Roles Screen

Admin - Configuration · https://learn.logisense.com/docs/330958174/

Last verified with: 10.8.6.0

Roles are configured in Setup / Users & Accounts / Users / Roles

Overview

Roles define the permissions that users receive in LogiSense Billing. A role is built by assigning one or more role groups, and those role groups collectively determine what the role is allowed to access.

Once a role has been created, it can be assigned to users on the Users screen. If multiple role groups attached to the same role grant different access levels, the effective permissions are determined by the combined permissions of those role groups.

The system also includes core roles that are provided by default. These core roles are reserved and cannot be modified or deleted.

Note: In the event role groups assigned to a role have opposing settings (one role group grants read rights to a screen and another does not grant read rights to the screen) the role group that enables the permission will take precedence.

Prerequisites

Role groups must already be configured before they can be assigned to a role.

Roles Panel

The Roles panel on the left lists the configured roles. Select a role to view or edit its details in the panel on the right.

Actions

Icon	Description
	Deletes the role if not in use
	Adds a new role

Edit Role Panel

The Edit Role panel displays the details for the selected role.

Fields

- **Name**: Identifies the role.
- **Type**: Determines whether the role is used for **Application** access or **API** access. The role groups assigned to the role must match this type.
- **SCIM Role**: Indicates that the role is managed through SCIM-based provisioning. These roles are typically created through identity-provider integration and have more limited direct maintenance on this screen.

Role Groups Tab

The **Role Groups** tab is used to assign or remove role groups for the selected role.

Use the **Role Groups** selection field to choose one or more available role groups, then click **Add** to attach them to the role. Only role groups that match the selected role type are available for selection.

The list on this tab shows the role groups currently assigned to the role. Removing a role group from the list removes its permissions from the role.

References Tab

The **References** tab shows where the selected role is being used elsewhere in the system. This is helpful when reviewing the impact of a change or determining whether the role can be deleted.

Guides

Adding Roles

1. In the **Roles** panel, click **Add**.
2. Enter the **Name** for the new role.
3. Select the **Type**.
4. Open the **Role Groups** tab.
5. Select one or more role groups and click **Add**.
6. Click **Save**.

Editing Roles

1. In the **Roles** panel, select the role you want to update.
2. Update the **Name**, if needed.
3. Open the **Role Groups** tab to add or remove role groups.
4. Click **Save**.

Deleting Roles

1. In the **Roles** panel, select the role you want to delete.
2. Review the **References** tab to confirm the role is not in use.
3. Click **Delete**.
4. In the confirmation dialog, click **Yes**.