Role Group Example

Admin Examples · https://learn.logisense.com/docs/609485123/

Summary

Role Groups allow you to define specific screen permissions that can be configured on roles in the LogiSense Billing application. For instance, you can setup a role group that can access specific account menu screens and another role group that can access certain setup menu screens and assign both role groups to a role. The role (e.g. ‘finance’) is then configured on a user to define that user’s permissions.

In this example we are going to create a ‘Billing’ group that will only have access to the billing options on accounts. This may be useful for users/groups that only need to initiate billing for an account and do not need access to the various other configuration options.

For additional details on the fields presented on the role groups screen see the Role Groups Screen screen help article.

Prerequisites

- Role groups can be setup as needed, there are no prerequisite configuration steps

Process

1. Log into the LogiSense Billing application
2. Click on the **Setup** menu then **Users & Accounts**
3. Click on **Users**
4. Click on **Role Groups**
5. Click on the icon to add a new role group
6. First enter ‘BillingGroup’ as the name then:

1. under the **Menus** section click **No Permission** beside **Account** until it shows as **Unrestricted**
2. next click **Full Permission** beside **Overview** until it changes to **Read Only**
3. follow the same steps to set **Profile** and **Communication** to **Read Only**
4. click on **Full Permission** beside **New** until it changes to **No Permission**
5. click on **Billing** and leave as **Full Permission**. On the **Screens** section you can see that this user will have full access to all billing screens

7. Click on **Save** to save the role group

Next Steps

- Once role groups are setup the permissions granted by the groups can be assigned to roles. See the Role Example article for details