Role Example

Admin Examples · https://learn.logisense.com/docs/613089976/

Summary

Roles are assigned one or more role groups to determine the permissions that a role is granted. Once roles are set up they can be assigned to users in order to impart the needed permissions to that user.

In this example we will create a role called ‘Billing’ that will use the permissions we set for the ‘BillingGroup’ Role Group in the Role Group Example.

For additional details on the fields presented on the roles screen see the Roles Screen screen help article.

Prerequisites

- Role groups must be setup in order to assign permissions to roles

Process

1. Log into the LogiSense Billing application
2. Click on the **Setup** menu then **Users & Accounts**
3. Click on **Users**
4. Click on **Roles** in the upper right
5. Perform the following steps to create a new Billing role and assign it to the ‘BillingGroup’ Role Group
    1. Under the **Roles** section click the icon to load the **Add Role** screen
    2. Enter 'Billing' as the **Name**
    3. Click the drop down arrow to show the **Role Groups**

4. Select ‘BillingGroup’ from the list
5. Click on the **+ Add** button
6. Click on the **Save** button

Next Steps

- Configuring system users. See the User Example guide for a sample user configuration