

# User Security Basics

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**Pathway:** [Setup](#) > [System](#) > [Role; Division; User](#)



This page is intended for System Administrators and anyone who creates/maintains user accounts in their Navusoft application.

This article provides an overview of the four key elements related to user security in Navusoft: Users, Permissions, Roles and Divisions. User security is critical to the operations of any business and should be maintained on a regular basis. When proper user security processes and protocols are in place, errors and costly mistakes are avoided and outside threats minimized.



User security protocols should consider the following:

- Level of access new or untrained staff should have.
- Level of access users should have based on their role and any responsibilities outside of their role.
- Process for inactivating a user account.
- Process for employees changing roles and how that affects their user account permissions.

## Permissions

A user must have the following permissions to view and make changes in any of the user security screens:

Permission ID	Permission Name
95	Setup Main Menu
120	Setup \ System and Security

## Users

**Setup** > **System** > **User**

When a person is added to the system, they are added as a user and have a user account. The specific permissions, or user rights, granted to their user account depend on their role within the organization. These permissions allow them to access different areas within the Navusoft application, enabling them to fulfill their job responsibilities.

Each user account is unique and users will not see tools they do not have access to.

USER SETUP														SETUP > SYSTEM > USER			
ID	STATUS	FIRST NAME	LAST NAME	EMAIL	PHONE	OFFICE PHONE	TITLE	DEPARTMENT	MANAGER	SALES GOAL TYPE	EXTERNAL ID	EXTERNAL USER ID	DEFAULT APP COLOR	DEFAULT HOME PAGE	ONLINE IMAGE	AUTOMATIC COUNTERSI...	SIGNATURE IMAGE
3	Active	Michael	Smith	michaels...			Tech Guy	Admin		Revenue			Dark Gray	Dashboard		No	
4	Active	Nikita	Ray	nikita@Fa...						Revenue			Dark Gray	Recent A...		No	
5	Active	Aliena	Springer	aliens@F...			Admin-NS	Admin	Henry Daye	Revenue			Blue	Recent A...		No	
6	Active	CT	ct@FakeEma...	ct@FakeE...			Admin - NS	Admin		Revenue			Dark Gray	Recent A...		No	
7	Active	Matthew	VanMeter	matthew...			Admin - NS	Admin		Revenue	99999		Dark Green	Recent A...		No	
8	Active	Dereck	Jones	dereck@F...			Terminated-NS	Admin	Henry Daye	Revenue			Blue	Recent A...		No	
9	Active	Brad	Peterson	brads@Fa...			NS Admin	Admin	Alek Orloff	Revenue			Dark Gray	Recent A...		No	
11	Active	Chris	Fairber	cFairber@...				Sales		Revenue			Dark Gray	Recent A...		No	
12	Active	Holley	Patterson	holley@F...			Director of I...			Revenue			Dark Gray	Recent A...		No	
13	Active	Dave	Roberts	davep@F...			Support Ana...			Revenue			Dark Gray	Recent A...		No	
22	Active	Isabel	Navarro	isabeln@...			Intern			Revenue			Blue	Recent A...		No	

## Related Articles:

[User Accounts](#)

# Permissions

[Setup > System > Permission](#)

All modules and tools in Navusoft are protected by Permissions. Permissions act as gatekeepers to restrict what tools a user can see and at what level they can interact. In some cases, users may minimally have view-only permissions to a tool. It is up to a system administrator to determine the permissions a user is assigned based on the responsibilities of their role.

PERMISSION SETUP						SETUP > SYSTEM > PERMISSION	
MODULE	NAME	DESCRIPTION	MODULE	DOCUMENTATION TOPICS	DOCUMENTATION VIEW SCORE		
83	View Period Closing		Accounting	2	4%		
84	Close an Accounting Period		Accounting	2	0%		
85	Reopen an Accounting Period		Accounting	0			
109	View Billing		Accounting	52	4%		
110	Add Billing Batch		Accounting	5	6%		
111	Post Billing Batch		Accounting	3	8%		
112	View/Add Vendor/Rebate Payment		Accounting	0			
113	Post Vendor/Rebate Payment		Accounting	0			
114	GL Transaction Processing		Accounting	6	1%		
115	Add GL Transaction Batch		Accounting	5	1%		
116	Post GL Transaction Batch		Accounting	6	2%		
117	AR Payment Batch		Accounting	20	3%		
140	Reverse an Invoice		Accounting	1	0%		
175	Void Vendor/Rebate Payment		Accounting	0			
<b>Role Permission</b>							
ID	ROLE	ACTIVE USERS	ROLE NAME	AUTHORIZATION STATUS			
1082	1	26	Navusoft Admin and Support	Authorized			
1256	2	6	Sales Manager	Not Authorized			
12009	3	17	Sales Representative	Not Authorized			
6056	4	99	Driver	Not Authorized			
2178	5	7	Controller	Authorized			
1660	1000	19	Operations Mgr	Not Authorized			

## Assigning Permissions

Permissions can not be assigned individually to a user account and are instead assigned to a 'Role' that includes a grouping of other permissions.

## Permissions for New Tools

Permissions are not automatically granted when new tools are released. A system administrator must review and authorize the permission first and assign it to the role it best applies.

## Related Articles:

[Permission Setup](#)

# Roles

[Setup > System > Roles](#)

Users may only access the tools in their Navusoft application by Permissions. Assigning permissions on an individual basis can create discrepancies for maintaining user security. Instead, permissions are assigned to a *Role*. Roles are groupings of many permissions assigned to user accounts that include many of the permissions a user needs to perform the duties of their job. Using Roles to assign permissions allows a system administrator to add or remove a permission in one location vs modifying multiple user accounts.

Users can be assigned one to many roles depending on their job duties.

The screenshot displays the 'USER SETUP' interface. At the top, there's a search bar and a 'HIDE INACTIVE' checkbox. Below is a table of users with columns: ID, STATUS, FIRST NAME, LAST NAME, EMAIL, PHONE, OFFICE PHONE, TITLE, DEPARTMENT, MANAGER, SALES GOAL TYPE, EXTERNAL ID, EXTERNAL USER ID, DEFAULT APP COLOR, DEFAULT HOME PAGE, ONLINE IMAGE, AUTOMATIC COUNTERS, and SIGNATURE IMAGE. A red arrow points to the 'OFFICE PHONE' column. Below the user list, there are tabs for 'Roles', 'Divisions', 'Commission Plan', and 'Capabilities'. The 'Roles' tab is active, showing a list of roles with columns for ROLE ID, ROLE NAME, and a toggle switch for each role.

ID	STATUS	FIRST NAME	LAST NAME	EMAIL	PHONE	OFFICE PHONE	TITLE	DEPARTMENT	MANAGER	SALES GOAL TYPE	EXTERNAL ID	EXTERNAL USER ID	DEFAULT APP COLOR	DEFAULT HOME PAGE	ONLINE IMAGE	AUTOMATIC COUNTERS...	SIGNATURE IMAGE
3	Active	Michael	Smith	michaels...			Tech Guy	Admin		Revenue			Dark Gray	Dashboard		No	
4	Active	Nikita	Ray	nikita@Fa...						Revenue			Dark Gray	Recent Ac...		No	
5	Active	Allena	Springer	allena@F...			Admin-NS	Admin	Henry Daye	Revenue			Blue	Recent Ac...		No	
6	Active	CT		ct@FakeEma...			Admin - NS	Admin		Revenue			Dark Gray	Recent Ac...		No	
7	Active	Matthew	VanMeter	matthew...			Admin - NS	Admin		Revenue	99999		Dark Green	Recent Ac...		No	
8	Active	Dereck	Jones	dereck@F...			Terminated-NS	Admin	Henry Daye	Revenue			Blue	Recent Ac...		No	
9	Active	Brad	Peterson	brads@Fa...			NS Admin	Admin	Alek Orloff	Revenue			Dark Gray	Recent Ac...		No	
11	Active	Chris	Fairber	cfairber@...				Sales		Revenue			Dark Gray	Recent Ac...		No	
12	Active	Holley	Patterson	holley@F...			Director of I...			Revenue			Dark Gray			No	
13	Active	Dave	Roberts	davep@F...			Support Ana...			Revenue			Dark Gray			No	
22	Active	Isabel	Navarro	isabeln@F...			Intern			Revenue			Blue	Recent Ac...		No	
27	Active	Emilia	Nateras	emilia@E...	28131		Admin-NS	Admin	Alek Orloff	Revenue			Blue	Recent Ac...		No	

  

ROLE ID	ROLE NAME	
1018	Customer Service Manager	<input type="checkbox"/>
1000	Operations Mgr	<input type="checkbox"/>
3	Sales Representative	<input type="checkbox"/>
2	Sales Manager	<input type="checkbox"/>
1022	Technician-Assignment	<input type="checkbox"/>
1021	Helper-Assignment	<input type="checkbox"/>
1019	CrewLabor/Technician	<input type="checkbox"/>
1017	Billing Mgr	<input type="checkbox"/>
1016	Dispatcher	<input type="checkbox"/>
1015	Customer Service Rep	<input type="checkbox"/>
1014	Administrator	<input type="checkbox"/>
5	Controller	<input type="checkbox"/>
1020	Driver-Assignment	<input type="checkbox"/>
4	Driver	<input type="checkbox"/>

## Pre-Built Roles

Navusoft offers a pre-built list of Roles, which includes the necessary permissions that users working within those roles may require. It is important to review the permissions associated with each role and make any necessary modifications before assigning them to user accounts. If there is a need for new roles that are not already provided, they should be created accordingly.

## Related Articles:

[Role Setup](#)

# Divisions

[Setup > System > Division](#)

Divisions refer to various operational locations, regions, or municipalities associated with a company. Normally, an employee is associated with a single division. However, within the Navusoft application, users can be assigned to

one or multiple divisions depending on the extent of their job responsibilities.

USER SETUP																	SETUP > SYSTEM > USER	
ID ↑	STATUS	FIRST NAME	LAST NAME	EMAIL	PHONE	OFFICE PHONE	TITLE	DEPARTMENT	MANAGER	SALES GOAL TYPE	EXTERNAL ID	EXTERNAL USER ID	DEFAULT APP COLOR	DEFAULT HOME PAGE	ONLINE IMAGE	AUTOMATIC COUNTERSI...	SIGNATURE IMAGE	
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5	Active	Aliena	Springer	aliena@F...			Admin-NS	Admin	Henry Daye	Revenue			Blue	Recent A...		No		
6	Active	CT	ct@FakeEma...	ct@FakeE...			Admin - NS	Admin		Revenue			Dark Gray	Recent A...		No		
7	Active	Matthew	VanMeter	matthew...			Admin - NS	Admin		Revenue	99999		Dark Green	Recent A...		No		
8	Active	Dereck	Jones	dereck@F...			Terminated-NS	Admin	Henry Daye	Revenue			Blue	Recent A...		No		
9	Active	Brad	Peterson	brads@Fa...			NS Admin	Admin	Alek Orloff	Revenue			Dark Gray	Recent A...		No		
11	Active	Chris	Fairber	cFairber@...				Sales		Revenue			Dark Gray	Recent A...		No		
12	Active	Holley	Patterson	holley@F...			Director of I...			Revenue			Dark Gray			No		
13	Active	Dave	Roberts	davep@F...			Support Ana...			Revenue			Dark Gray			No		
22	Active	Isabel	Navarro	isabeln@...			Intern			Revenue			Blue	Recent A...		No		
23	Active	Emilia	Nataron	emilia@E...	78121		Admin-NS	Admin	Alek Orloff	Revenue			Blue	Recent A...		No		

  

DIVISION ID	DIVISION NAME	MAX DEFAULT RATE DISCOUNT	
1001	QAWASTE		<input checked="" type="checkbox"/>
1002	CORPUS		<input checked="" type="checkbox"/>
1003	DAYTON		<input checked="" type="checkbox"/>
1004	HOUSTON	10%	<input checked="" type="checkbox"/>
1005	HILLSBORO		<input checked="" type="checkbox"/>
1006	HEARNE		<input type="checkbox"/>

## Recommended Best Practices

### All Users

- Consider logging off or locking your workstation whenever you leave it unattended.
- Never provide your password to another user who may not have the same permissions as you.

### Administrative Users

- Review and assign only the roles/permissions a user needs to perform the duties of their job.
- Disable user accounts for employees who have left.
- Review permissions for employees who are changing roles in the company.