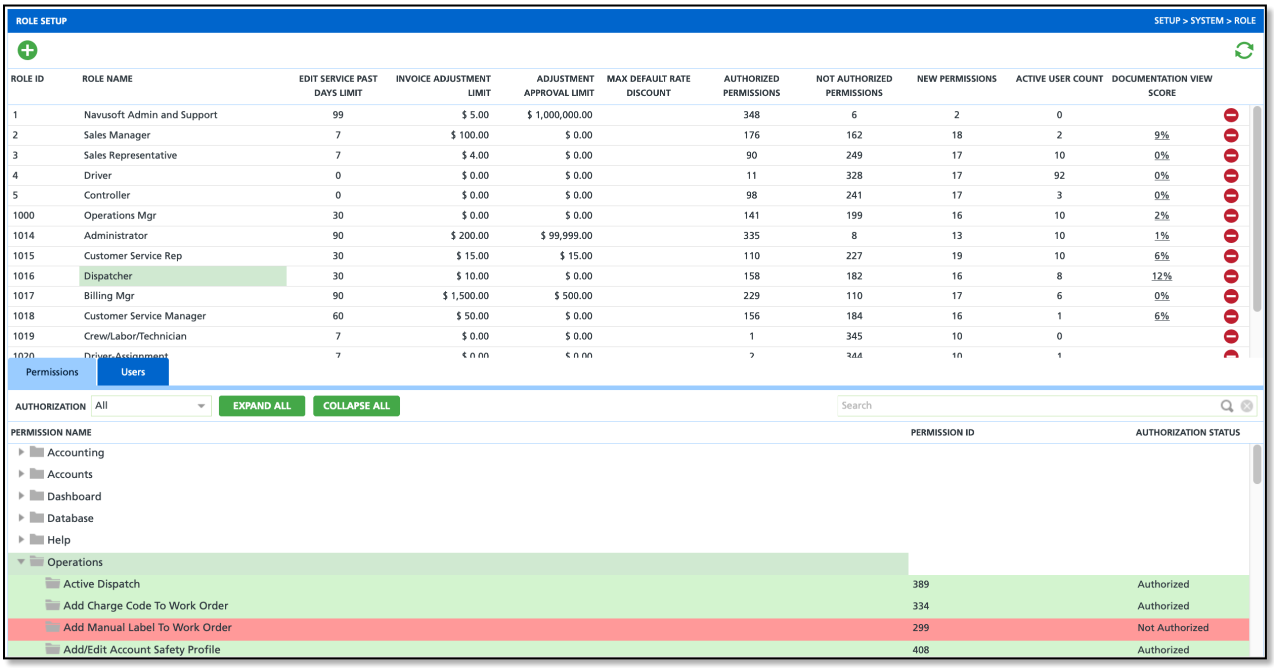
Role Setup

Last Modified on 03/13/2024 2:34 pm EDT

Pathway: *Setup > System > Role*

Roles in the Navusoft application serve as collections of permissions necessary for users to access and operate within the system. Navusoft offers a predefined set of roles that are readily available for assignment to user accounts. These roles, as established by Navusoft, can be modified, edited, or tailored to align with the specific requirements and preferences of individual companies. This customization feature empowers organizations to finely adjust access privileges based on the unique needs of their users and operational structure.



Permissions

The following permissions are required to add and edit Role Setup:

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

Field Descriptions

The following fields display on the Roles Setup screen. To edit a role, double-click within its row.

Field	Description
Role ID	The individual role's ID.
Role Name	The name of the role.
Edit Service Past Days Limit	Limits the number of days after a service has been completed the service record can be edited.
Invoice Adjustment Limit	Limits the amount a user assigned to the role can adjust an invoice by.

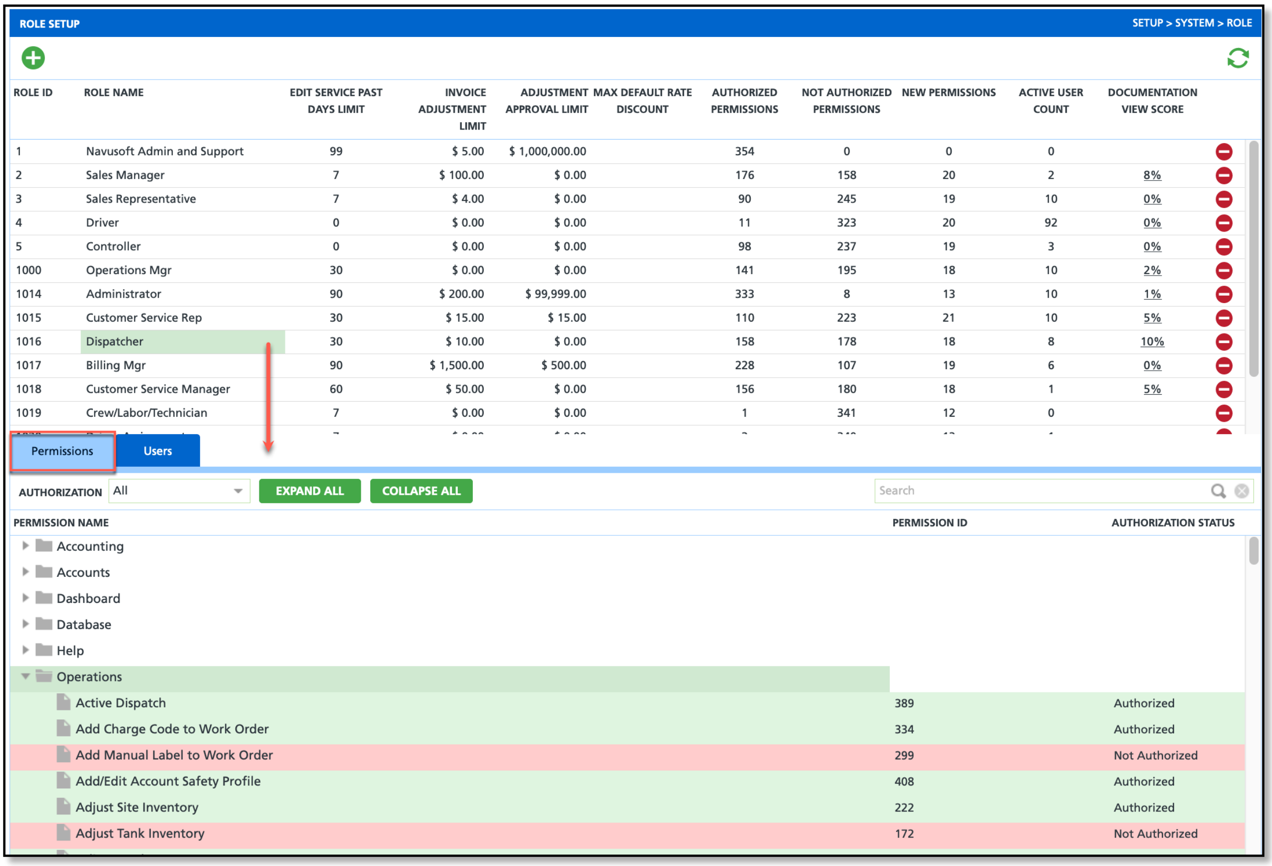
Adjustment Approval Limit	Limits the amount a user assigned to the role can approve invoice adjustments made by other users. Consider reserving this limit to only admin level roles.
Max Default Rate Discount	Limits the discount amount a user can apply if discounts are enabled on the service code.
Authorized Permissions	The total count of permissions the role includes. Any user assigned to the role will receive all the permissions it includes.
Not Authorized Permissions	The total count of permissions not included in the role.
New Permissions	The total count of permissions that are new to the application and should be reviewed for each role. New permissions must be manually added to a role.
Active User Count	The total count of user accounts that have an active account status AND are assigned to the role.
Documentation View Score	The measurement of documentation use among the users. Select the percentage value displayed to review who has accessed the documentation.

Tab Descriptions

Single-click on a role to open the Permissions and Users tab-set to add and edit the permissions and users of a role.

Permissions

Displays a list of all permissions that can be assigned to a role. Select a role to view the permission list.



Screen Descriptions

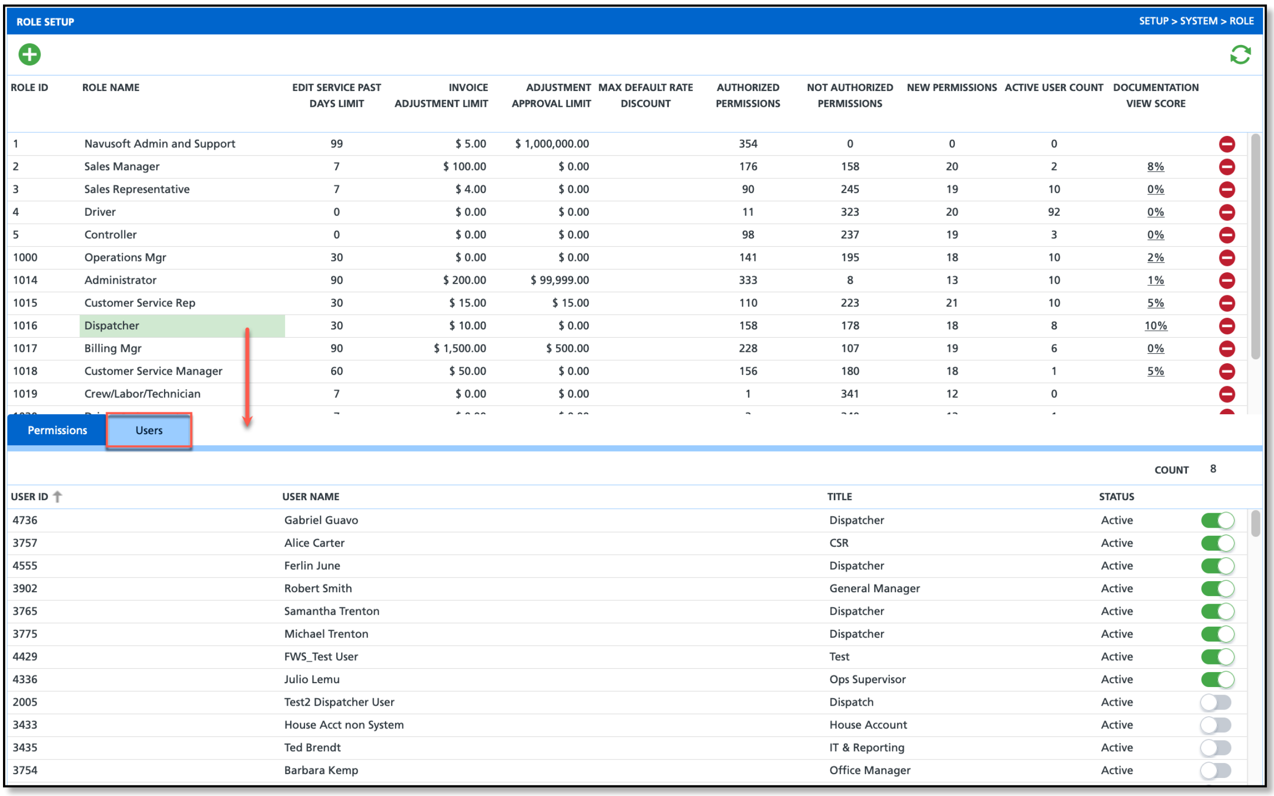
Field/Button	Description

Authorization	Filters permissions based on the Authorization Status (New, Authorized, Not Authorized).
Expand All/Collapse All	Option to expand or collapse the module list.
Permission Name / Permission ID	Displays the name and ID of the permission associated to the module.
Authorization Status	Displays the current authorization of the permission for the role. To change the status, click within the column and select the authorization status that applies. • **New:** Permission is related to a new enhancement and must be manually added to the role(s) it applies. • **Authorized:** Permission was applied to the role and any user assigned to the role will have the permission. • **Not Authorized:** Permission is not applied to the role. The background color shown on the screen for each permission indicates the authorization status associated with the role.

Users

Displays a list of all active and inactive user accounts that can be added or removed from each role. Select a role to view the list of user accounts.

> **Best practice tip:** consider removing inactive user accounts from all Roles they are assigned to prevent security breaches.

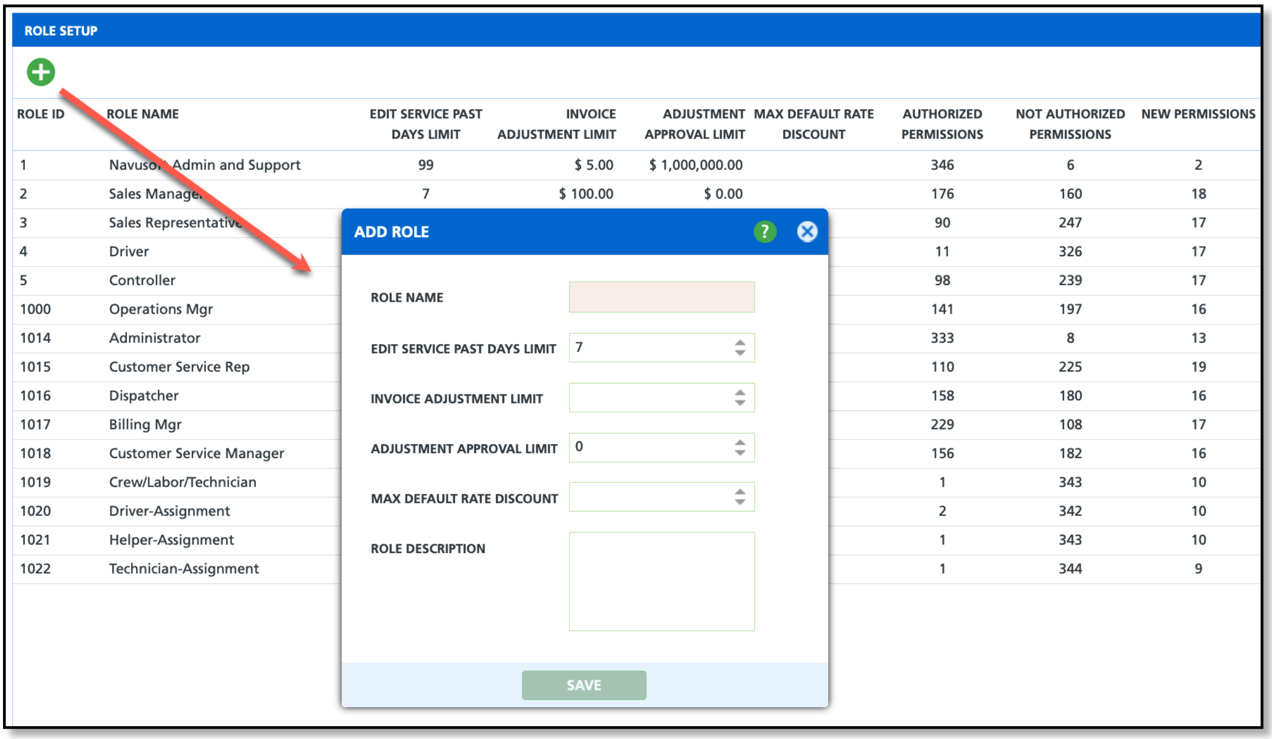


Screen Descriptions

Field	Description
User ID / User Name	Identification fields to identify the user account.
Title	Displays the role of the user, identified in their user profile.
Status	Indicates the current status of the user account (displays either 'Active' or 'Inactive').
Add/Remove Toggles	Use the toggle button associated with the user to either add or remove a user from an account.

Add a New Role

To add a new role, select the green plus icon in the upper left corner of the Role Setup screen to display the Add Role editor.



Field Descriptions

Field	Description
Role Name	Identifies the role.
Edit Service Past Days Limit	Limits the number of days after a service has been completed that the service record can be edited.
Invoice Adjustment Limit	Limits the amount a user assigned to the role can adjust an invoice by.
Adjustment Approval Limit	Limits the amount a user assigned to the role can approve invoice adjustments made by other users in the *Invoice Adjustment - Pending Approval and History* screen in the Accounting module. Consider restricting this limit to roles with admin-level privileges.
Max Default Rate Discount	Limits the discount amount a user can apply if discounts are enabled on the service code.
Role Description	Option to include a note regarding the role such as who it specifically applies to. Descriptions display upon hovering your mouse over the name of the role.

Add Role

1. Select the green add icon to open the 'Add Role' popup window.
2. Enter a **Role Name**. This is the only required field to add a new role.
3. Adjust the **Edit Service Past Days Limit** to fit within the requirements of the role *(Optional)*.
4. Adjust the **Invoice Adjustment Limit** to fit within the requirements of the role *(Optional)*.
5. Adjust the **Adjustment Approval Limit** to fit within the requirements of the role *(Optional)*.
6. Adjust the **Max Default Rate Discount** to fit within the requirements of the role *(Optional)*.
7. Enter a **RoleDescription** (optional). Anything entered here will display when hovering the cursor over the name of the role.
8. Click **Save** when finished.

Delete a Role

If a role is no longer needed, the option to delete is available. When a role is deleted, the role and any permission it granted is removed from all user accounts linked to it.

> Before deleting a role, consider reviewing the Active User Count, Users and Authorized permissions the role included.

ROLE SETUP   SETUP > SYSTEM > ROLE

ROLE ID	ROLE NAME	EDIT SERVICE PAST DAYS LIMIT	INVOICE ADJUSTMENT LIMIT	ADJUSTMENT APPROVAL LIMIT	MAX DEFAULT RATE DISCOUNT	AUTHORIZED PERMISSIONS	NOT AUTHORIZED PERMISSIONS	NEW PERMISSIONS	ACTIVE USER COUNT	DOCUMENTATION VIEW SCORE
1	Navusoft Admin and Support	99	$ 5.00	$ 1,000,000.00		346	6	2	0	
2	Sales Manager	7	$ 100.00	$ 0.00		176	160	18	2	9%
3	Sales Representative	7	$ 4.00	$ 0.00		90	247	17	10	0%
4	Driver	0	$ 0.00	$ 0.00		11	326	17	92	0%
5	Controller	0	$ 0.00	$ 0.00		98	239	17	3	0%
1000	Operations Mgr	30	$ 0.00	$ 0.00		141	197	16	10	2%
1014	Administrator	90	$ 200.00	$ 99,999.00		333	8	13	10	1%
1015	Customer Service Rep	30	$ 15.00	$ 15.00		110	225	19	10	5%
1016	Dispatcher	30	$ 10.00	$ 0.00		158	180	16	8	11%
1017	Billing Mgr	90	$ 1,500.00	$ 500.00		229	108	17	6	0%
1018	Customer Service Manager	60	$ 50.00	$ 0.00		156	182	16	1	5%
1019	Crew/Labor/Technician	7	$ 0.00	$ 0.00		1	343	10	0	
1020	Driver-Assignment	7	$ 0.00	$ 0.00		2	342	10	1	
1021	Helper-Assignment	7	$ 0.00	$ 0.00		1	343	10	0	
1022	Technician-Assignment	7	$ 0.00	$ 0.00		1	344	9	0	

Related Articles

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