

# Permission Setup

Last Modified on 03/13/2024 2:37 pm EDT

**Pathway:** Setup > System > Permission

Within the Navusoft application, user accounts require specific permissions for daily operations. These permissions are not directly allocated to individual users; rather, they are assigned to roles linked to a user's account. For instance, accounting permissions might be assigned to a role named "Accounting" or "Accountant," and any user within that role will automatically receive the associated permissions. This role-based approach streamlines the management of permissions, making it more efficient and organized.

PERMISSION SETUP						SETUP > SYSTEM > PERMISSION
MODULE	<input type="text" value="Search"/> <span>Q</span> <span>X</span> <span>↻</span>					
PERMISSION ID	NAME	DESCRIPTION	MODULE	DOCUMENTATION TOPICS	DOCUMENTATION VIEW SCORE	
1	Log In to Navusoft Core		System	124	6%	
2	Add Prospect Accounts and Sites		Accounts	4	1%	
3	Edit Prospect Account		Accounts	1	6%	
4	Edit Prospect Site		Accounts	0		
5	View Account		Accounts	115	1%	
6	View Site		Accounts	40	2%	
7	Edit Account Status		Accounts	2	3%	
8	Edit Site Status		Accounts	1	3%	
9	Add Appointment		Accounts	1	2%	
10	Edit Appointment for Self		Accounts	0		
11	Delete Appointment for Self		Accounts	0		
12	Edit Appointment for Others		Accounts	0		
13	Delete Appointment for Others		Accounts	0		

  

ID	ROLE	ACTIVE USERS	ROLE NAME	AUTHORIZATION STATUS
1004	1	26	Navusoft Admin and Support	Authorized
1178	2	5	Sales Manager	Authorized
11792	3	17	Sales Representative	Authorized
5978	4	99	Driver	Not Authorized
2100	5	7	Controller	Authorized
1582	1000	20	Operations Mgr	Authorized
10209	1014	14	Administrator	Authorized
10631	1015	12	Customer Service Rep	Not Authorized

## Permissions

A user must have the following permissions to use the Permission Setup screen:

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

## Field Descriptions

Field	Description
Permission ID	The ID associated with the permission.
Name	The name of the permission and in some instances indicates the level of access the permission provides.
Description	Brief description about what user rights the permission carries.

<b>Module</b>	The module the permission is associated to. Permissions can be filtered by module using the Module drop down selection box in the upper left corner of the Permission Setup screen.
<b>Documentation Topics</b>	Displays the total count of documentation articles related to the permission. This includes Help documentation and Release Notes.
<b>Documentation View Score</b>	Shows a computed percentage value that represents the proportion of documents viewed.

## Role Permission (Tab)

While it may not be mandatory to conduct regular reviews of Role Permissions, it is recommended to periodically reassess them. This becomes particularly important when new tools and features are introduced or when operational changes occur. Periodic reassessment ensures that Role Permissions remain aligned with the evolving needs and dynamics of your internal operations, contributing to the overall security and efficiency of your team and the application.



When a permission is selected, the Role Permission tab displays and lists all roles permissions can be assigned to. Roles are added and removed in *Setup > System > Role*.

PERMISSION SETUP						SETUP > SYSTEM > PERMISSION	
MODULE	System		Search				
PERMISSION ID	NAME	DESCRIPTION	MODULE	DOCUMENTATION TOPICS	DOCUMENTATION VIEW SCORE		
1	Log In to Navusoft Core		System	124	6%		
368	Chat with Employees in my De...		System	1	0%		
369	Chat with Employees in Other ...		System	0			
370	Chat with Drivers		System	0			
371	Chat with Sales Reps		System	0			
<div style="border: 1px solid red; padding: 2px; display: inline-block;">Role Permission</div>							
ID	ROLE	ACTIVE USERS	ROLE NAME	AUTHORIZATION STATUS			
1000	1	26	Navusoft Admin and Support	Authorized			
1174	2	5	Sales Manager	Authorized			
11788	3	17	Sales Representative	Authorized			
5974	4	99	Driver	New			
2096	5	7	Controller	Authorized			
1578	1000	20	Operations Mgr	Authorized			
10205	1014	14	Administrator	Authorized			
10627	1015	12	Customer Service Rep	Authorized			
11018	1016	10	Dispatcher	Authorized			
11430	1017	8	Billing Mgr	Authorized			
12212	1018	3	Customer Service Manager	Authorized			
13173	1019	2	Crew/Labor/Technician	Not Authorized			
13519	1020	5	Driver-Assignment	Not Authorized			

### Descriptions

Field	Description
ID	External ID field.

<b>Role</b>	Displays the role's ID.
<b>Active Users</b>	Displays the total count of active user accounts assigned to the role. If a permission is added to the role, all user accounts linked to the role will inherit the permission. <i>Select the underlined numeric value to display a list of users.</i>
<b>Role Name</b>	Displays the name of the role.
<b>Authorization Status</b>	Indicates which roles the permission is authorized or not authorized in. This is also indicated by the red and green background color. <ul style="list-style-type: none"> <li>• New: Indicates recently released permissions awaiting authorization status from a system administrator, highlighted with a white background color.</li> <li>• Authorized: Shows a green background color to indicate that the role does include the permission.</li> <li>• Not Authorized: Shows a red background color to indicate that the role does not include the permission.</li> </ul>

### Add/Remove Roles From a Permission

1. Select the permission from the Permission list at the top.
2. Review the roles in the Role Permission tab. Click the Authorization Status column in a role to see the status options in the drop down menu.
  - Select the authorization status that applies.
3. Click away to save, and the system will display a popup message confirming the successful saving of the role permission.

### Review Active Users

1. Select the permission from the Permission list at the top.
2. Select the value displayed in the Active Users column of the Role Permission grid to display a list of users.
  - This is a read-only list. To remove or add users to a role, navigate to *Setup > System > Role* and update users from the Users tab.

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### Related Articles

[User Security Basics](#)

[User Accounts](#)

[Role Setup](#)

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