Maintaining Users, Roles, and Permissions

Everyone that can log into Propello will have an assigned *user*. That user can be assigned to various *roles*. Those roles will have specific permissions to allow access to certain applications and restrict access from others.
We are going to offer some best practices for managing your users and roles. We will also move through the process to add a new role and to add a new user. Select an option to get started.

Topics

- Managing Users and Roles
- Adding a Role
- Adding a User
- Maintaining Users and Roles

Managing Users and Roles

Defining naming conventions and identifying the roles that will be needed, is a good way to approach security setup. Usernames should have a consistent format such as first initial followed by last name. Roles, which allow those users to access certain pages and functions, should be well planned.
Think about the various positions in your business. Are there management roles? Are there specific employees that will be allowed to create purchase orders? Maybe you will have lead cashiers or clerks who can perform functions beyond others running point of sale.
These are a few items to consider before you begin to add roles and users.

Adding a Role

After defining your roles, you will need to add them and identify the associated permissions.
Click the 'Admin' icon and select **Manage Roles**. All existing roles are displayed in the table.
To add a new role, click the 'Add' button.
In the **Add New Role** screen, enter the name of the new role in this field.
Check the boxes next to each permission to assign those permissions to the role.
You can select an application name from the 'Filter by Application' drop-down menu to isolate specific functional areas.
For example, if we choose 'Customer', only those permissions related to account activity are displayed.
Click Save when you are done. When a user is *assigned* this role, the selected permissions will be inherited.

Adding a User

Click the ‘Admin’ icon and select **Manage Users**. Any existing users are displayed in the table.
Tap the ‘Add New User’ button.
Enter the user’s first and last name along with all the required information. Required fields are noted with a red asterisk.
Using the naming convention you created, enter a unique username.
Add and then verify a strong password based on the criteria shown.
The user status is ‘Active’ by default.
Setting the ‘User Administrator’ toggle to on will allow them to create and edit user accounts.
The ‘System Administrator’ toggle will give this user access to all the functions found under the ‘Admin’ or gear icon.
Click **Save & Edit** to save changes and edit the user’s permissions.
Click **Save & Add More** to save changes and add another user.
Click the **Authentication** tab to make login and password-related changes.
The **Licenses** tab contains the available Propello licenses purchased. Work with your Customer Account Manager if other options are needed.
The **Roles** tab is where your user and their position in your business, come together. Associate one or more based on what actions you need this user to perform.
For example, your Customer Account Manager may need access to POS functions or other Accounting functions.
Save the changes and your user will be able to access only what you have determined they need to.

Maintaining Users and Roles

From ‘Manage Users’, you can search for a specific user with the name, email, or phone number.
The ‘Default Store’ and ‘Last Login Date’ drop-down menus allow you to narrow your search results.
Sort the table by ‘Active’, ‘In-Active’, or ‘Locked’ status.
The table displays basic information such as the ‘Default Store’, ‘Email ID’, and ‘Last Login Date’.
To select a user, check the box next to one.
You can export the data to an Excel sheet.
The **Edit** and **Copy User** buttons let you edit and copy respectively.
We will click the **Edit** icon.

In the **Account Information** tab, make the required changes.
In the **Licenses** tab, you can filter the licenses assigned to the user with the **All**, **Assigned**, **Not Assigned**, and **Not Available** tabs.
Make necessary changes using the checkbox.
In the **Roles** tab, select a store from the drop-down if applicable and search for any specific role in the search bar.
Check the box next to the role to assign it to the user or uncheck one to remove it. Remember to save any changes.
To delete users, check the adjacent checkbox.
Tap the **Actions** drop-down menu and select **Delete Users**. Select ‘Yes’ to delete.

You can easily edit any existing role from **Manage Roles**.

Select a role to edit by checking the adjacent box and click **Edit**.
In the **Edit Role** screen, search for permissions in the search bar.
The search results can be narrowed down using the **Filter by Application** drop-down menu. Select any permissions to add or remove from the role. Click **Save** and tap **Table View** to return to the Manage Roles screen.

To duplicate a user role, search the specific role in the search bar.
Select the role and click **Copy**.
Enter the new role name in *this* field and click **Save**.
To edit the role permissions, click the **Save & Edit** button instead.

You can delete a role that is no longer in use.
Click the **Actions** drop-down menu.
Select **Delete Role**.
Select **Yes** to delete.

Recap

As you can see, each user is given unique login credentials and their permissions are restricted to the roles assigned to them.
In this course, we described the best way to access users and roles. We also described how to add new roles and users, and the maintenance of users and roles.

About Epicor

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