Managing Roles and Permissions

Different people will be using your configurators, and they need to perform different tasks. You can use the security features to control what they can see, and what they can do.

Objectives

- Understanding Roles and Permissions
- Managing Roles and Permissions Topic 3

Understanding Roles and Permissions

Configurator security is designed to give the right users the right permissions. You're already familiar with Users. Each person or automated process that performs a transaction in the configurator system gets a User record. The security system also tracks Permissions. These are the various abilities you can grant your users. Abilities like adding attachments or comments, or viewing the public price of the product, or even the private cost of making it as well. Trying to join all the permissions to all the users is too complicated to manage. Instead, a set of Roles organizes the users and permissions. Think of a role as a collection of permissions that a specific job requires. For example, a salesperson role may have some permissions, while a sales manager role may have more powerful permissions. After you define a role, you can assign it to a user, and the user gets all the permissions associated with that role. You can add multiple roles to a single user. For example, one user could have both the sales manager role and the engineer role. Roles are additive, which means they only give a user more permissions. They don't take any permissions away. So, if the sales manager role is permitted to view discounts, and the engineer role is permitted to view cost, then any user who has both roles has both of those permissions.

Managing Roles and Permissions

You've learned the theory behind roles and permissions. Let's see it in practice. In the administrative interface, click Users and Roles and then Users. Find and open the user record. Then add or remove what's needed in the Roles field. To manage roles, click on Users and Roles then Roles. In the list of roles, you can Add, Clone, or Delete a role. To change a role's name or description, click the role name and edit it. After a role is created, you can assign permissions to it. All permission assignments are done on one list. Click Users and Roles and then Permissions to see that list. Browse the page until you see the permission you want to assign, and then just add the role to it. From time to time, you may need to audit the permissions of your configurator system. This same permissions list summarizes all the assignments between permissions and roles. You can easily confirm which roles have a certain permission.

Recap

The security model is simple to manage, but quite powerful. Permissions control what users can see, and what they can do. These permissions are grouped into Roles for easy assignment. Roles can be edited and their related permissions easily audited to provide control over configurator activity. Body Text

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