

User Roles

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[Relates to version](#)

Tags: 7.3

Users are assigned roles and the permissions those roles contain determine what the user can do in the system. Each role will have one or more permissions assigned to it.

You can create your own roles or select ones from the list of preconfigured roles that come with the system.

Add a new System/Custom role

1. Navigate to the **Roles** page and click either the **New System Role** or the **New Custom Role** menu item.
2. In the **Add System/Custom Role** popup, provide a name and description for the role and click **Save**.

Clone a role

1. Navigate to the **Roles** page, select the role you want to clone and click the **Clone** menu item.
2. In the **Clone Role** popup, provide a name, description and select *Custom* or *System* from the **Custom/System** dropdown.
3. Click **Clone**.

View permissions assigned to a role

To see which permissions are linked to a role:

1. Navigate to the **Roles** screen and click on the role.
2. Click the **Permissions** menu item to open the **Permission History** screen.
3. Scroll down the list of permissions and the ones highlighted in yellow are assigned to the role.
4. Click **Role Permission History** to see what permissions were assigned/unassigned to a role.

Assign Permissions to Role

Permission History

Unassign Role Permission History

Permission	Desc	Assigned
▶ Permission Category: Inventory Permissions		
☑ Permission Category: KPI Management		
KPI Definition Admin	Users with this permission can create/update KPI definitions	No
KPI Recording	Users with this permission can record KPI values	No
▶ Permission Category: Label Printing		
▶ Permission Category: Master Data Configuration		
▶ Permission Category: MESTEC Support		
▶ Permission Category: Other Permissions		
▼ Permission Category: Planning and Scheduling		
Job Notes - Read	Users with this permission can view job notes	Yes
Add/Edit Capacity Hours	Users with this permission can add/edit capacity hours	No
Add/Edit Capacity Scenarios	Users with this permission can add/edit capacity scenarios	No
Add/Edit Forecast Quantities	Users with this permission can add/edit forecast quantities	No
Add/Edit Forecast Scenarios	Users with this permission can add/edit forecast scenarios	No

5. Click **Role Permission History** to see what permissions were assigned/unassigned to a role.

Role Permission History

Action	Permission	Actioned By	Actioned
Assign	Append Task Qty	Shane Adams	17/04/2024 14:37:03
Assign	BoM Manager Edit BoM	Shane Adams	17/04/2024 14:37:03
Assign	Complete Material	Shane Adams	17/04/2024 14:37:03
Unassign	Assign / Unassign Material to a Works Order	Shane Adams	17/04/2024 14:37:19
Assign	Assign / Unassign Material to a Works Order	Shane Adams	17/04/2024 14:37:03

Assign/unassign permissions to a role

You can add permissions to a new role you created or to an existing role.

1. Navigate to the **Roles** screen and click on the role.
2. Click the **Permissions** menu item to open the **Permission History** screen. Permissions are listed beneath their relevant categories.

Assign Permissions to Role



Permission History

Role Permission History

Permission	Desc	Assigned
▼ Permission Category: Inventory Permissions		
Assign / Unassign Material to a Works Order	Users with this permission can assign and unassign material to a works order	Yes
Complete Material	Users with this permission can perform material completions	Yes
Create WIP Item	Users with this permission can create new items to be manufactured.	Yes
Material Item Notes - Administration	Users with this permission can create / edit / delete material item notes	Yes
Material item notes - Read	Users with this permission can view item notes	Yes
Material Item Update	Users with this permission can update various fields against material items.	Yes
Move Material	Users with this permission can move material from one location to another.	Yes
Receive Material	Users with this permission can receive material into stock (receipt at point of consumption and receipt of materials to warehouse)	Yes
Remove All Materials	Users with this permission can reverse consumption in Item BoM Manager	Yes
Remove Material	Users with this permission can reverse consumption on a works order	Yes
Split Material	Users with this permission can take a quantity from an existing material item and create new.	Yes
Stock Items / Stock Summary report	Users with this permission can access the stock items / stock summary reports	Yes
Use / Consume Material	Users with this permission can consume material to a works order	Yes
Append Task Qty	Users with this permission can append a qty to a batch to replace scrapped units	No
BoM Manager Edit BoM	Users with this permission can edit the BoM Slot in Item BoM Manager	No
Convert Material	Users with this permission can perform a material conversion	No

3. Select the permissions you require for the role (several can be selected at a time) and click the **Assign** button that appears.
4. The rows of the added permission will turn yellow, and the **Assigned** column will show Yes.
5. To remove a permission from a role, select the assigned permission and click **Unassign** that appears.

Clone a Permission

1. Navigate to the **Permissions** page, click the permission you want to clone and click the **Clone** menu item.
 2. In the **Clone Permission** popup, provide a name, description and select a category from the dropdown.
 3. Click **Clone**.
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