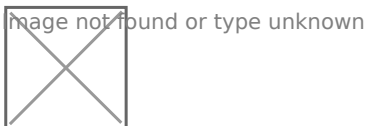


20.3 Roles

The **Roles** module is responsible for managing user permissions for different modules and sub-modules, as well as defining the level of access for each role. According to the established structure, different responsibilities have access to the system at varying degrees. The administrator can specify the permissions and authority depending on a certain role on this page. For instance, a predefined role designed for service providers has been set up so that any person assigned to that job will have access to the necessary features and tools for managing service delivery effectively. The roles can be sorted by the associated categories.

20.3.1 Navigation to Roles

- Open the sidebar and click on the **Settings** to expand.
- Now, click on the **User Information Management** and select **Roles**.



This redirects to the **Roles** page

Overview:

User can view the list of existing roles in the system.

- User can create a new role (refer to section 20.3.2 Create Role).
- User can Edit the role (refer to section 6.1 Edit Record) and Delete the role (refer to section 6.3 Delete Record).

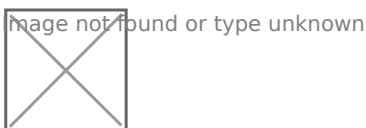


Figure 20- 4 List of Roles

20.3.2 Create Role

Create Role tool is used to add new Role. This tool is to be used when the list of predefined roles does not meet the requirements, or any new role needs to be defined.

- Click on the **“Create Role”** button.

Image not found or type unknown



Image not found or type unknown



Figure 20- 5 Create new Role

- Provide a suitable name for the new role.
- Then fill the required data, check the boxes of permissions to be provided to that role.
- There is a search field that can be used for efficient and easier navigation through the list of permissions.
- The user should always follow the **Zero Trust Policy** while assigning permissions to any particular role. The role should have only the permissions that are required by that role. No more, no less.
- Newly added Role will be added at the end of list in Role List.
- The input fields expand when the particular category is selected.
- Fill all the required data and click **Save** button.
- When the user assigns a role to the designated user, the system notifies the user with the pop-up message as:

Image not found or type unknown



- If the user attempts to assign a role to a user who already has the role assigned, the system notifies the user with an error message as:

Image not found or type unknown



Figure 20- 6 Name validation for role creation

Note:

- To create a new role, the user must follow the naming convention: User Type – Role Name.

- For example, creating a role as a municipality admin should follow this format:
Municipality – IT Admin.

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