How To...
Manage User Roles

Introduction to User Roles

The Key comes complete with an extensive number of permissions that can be applied to any user. The details of these permissions, and other settings that relate to user access to the Key, can be found in the 'How To Setup User Profiles Within The Key' guide.

In order to provide a better management of the user permissions, the concept of a user role is available within the Key. A user role is a collection of permissions that can then be assigned to an individual user in one go.

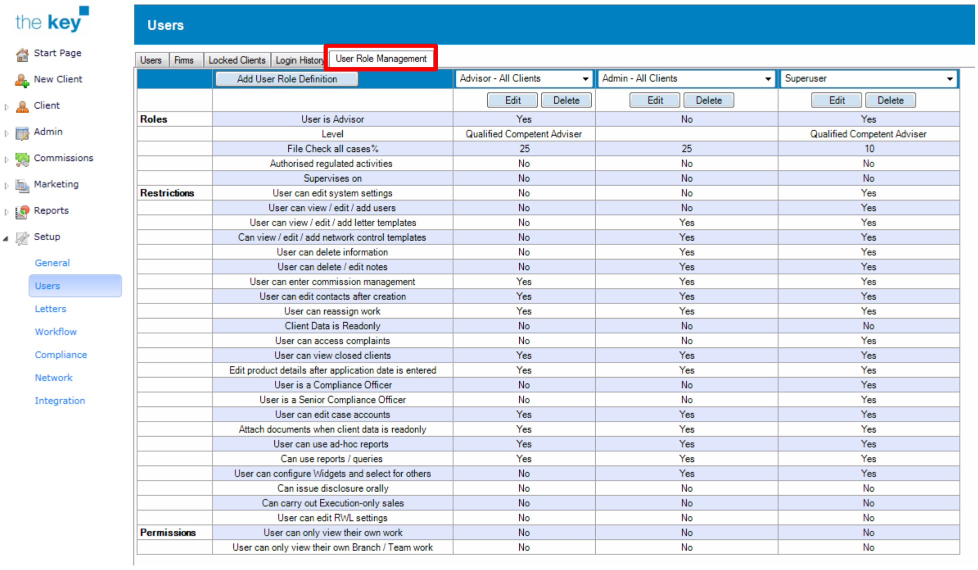
A further advantage to a user role is that if any change is made to the permissions that make up that role, they will be disseminated to all users with that role immediately, thereby removing the need to amend each individual user profile.

It should be noted that although user roles can be used, there is no requirement to do so, and permissions can be managed on a user-by-user basis as outlined in the guide mentioned above.

Viewing User Roles

The Key includes a set of user roles by default. These roles can be used, edited or deleted as required.

Existing user roles are displayed in the Setup>Users>User Role Management screen, as shown below:



		Advisor - All Clients	Admin - All Clients	Superuser
		Edit Delete	Edit Delete	Edit Delete
Roles	User is Advisor	Yes	No	Yes
	Level	Qualified Competent Adviser		Qualified Competent Adviser
	File Check all cases%	25	25	10
	Authorised regulated activities	No	No	No
	Supervises on	No	No	No
Restrictions	User can edit system settings	No	No	Yes
	User can view / edit / add users	No	No	Yes
	User can view / edit / add letter templates	No	Yes	Yes
	Can view / edit / add network control templates	No	Yes	Yes
	User can delete information	No	Yes	Yes
	User can delete / edit notes	No	Yes	Yes
	User can enter commission management	Yes	Yes	Yes
	User can edit contacts after creation	Yes	Yes	Yes
	User can reassign work	Yes	Yes	Yes
	Client Data is Readonly	No	No	No
	User can access complaints	No	No	Yes
	User can view closed clients	Yes	Yes	Yes
	Edit product details after application date is entered	Yes	Yes	Yes
	User is a Compliance Officer	No	No	Yes
	User is a Senior Compliance Officer	No	No	Yes
	User can edit case accounts	Yes	Yes	Yes
	Attach documents when client data is readonly	Yes	Yes	Yes
	User can use ad-hoc reports	Yes	Yes	Yes
	Can use reports / queries	Yes	Yes	Yes
	User can configure Widgets and select for others	No	Yes	Yes
	Can issue disclosure orally	No	No	No
	Can carry out Execution-only sales	No	No	No
	User can edit RWL settings	No	No	No
Permissions	User can only view their own work	No	No	No
	User can only view their own Branch / Team work	No	No	No

Figure 1: User Role Management Tab

This screen can show up to three different user roles. To select the user role to be displayed, click on the dropdown and select a role from the list.

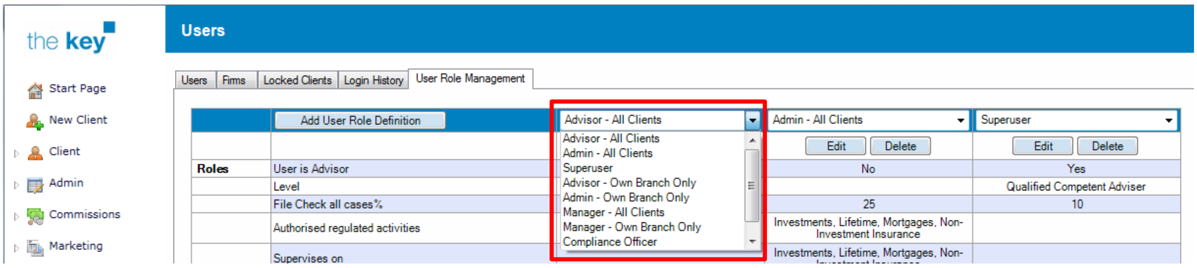


Figure 2: Selecting a Different User Role

Underneath the role is a summary of all the permissions available, and the current setting for that role. These permissions are divided into three sections:

- Roles
    - Advisor status, file check level etc.
- Restrictions
    - The main access restrictions for different areas of the Key
- Permissions
    - Branch/Team access permissions

Details of all of these settings can be found in the 'How To Setup User Profiles Within The Key' guide.

Creating a New User Role

A new role is created by first clicking on the 'Add User Role Definition' button.

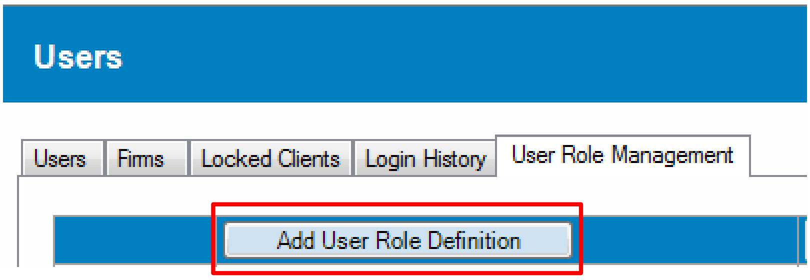


Figure 3: Add User Role Button

Selecting this button will launch a screen to manage the details of the user role.

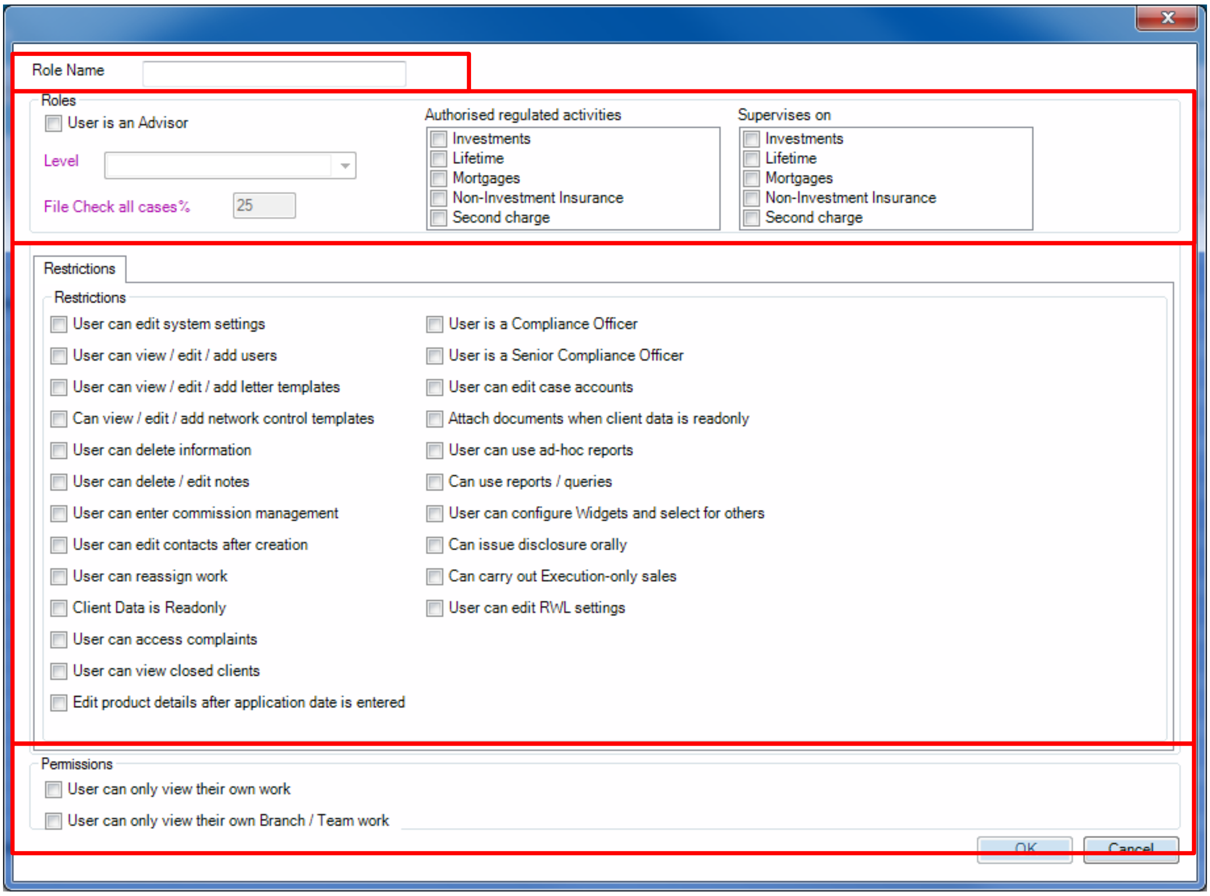


Figure 4: User Role Details

Add a name for the role, and then confirm the details for this new role including the user status, restrictions and permissions. Once complete, click on the 'OK' button to save the new role.

Editing a User Role

To edit a role, select it from one of the dropdowns available in the Setup>Users>User Role Management screen, and click on the 'Edit' button.

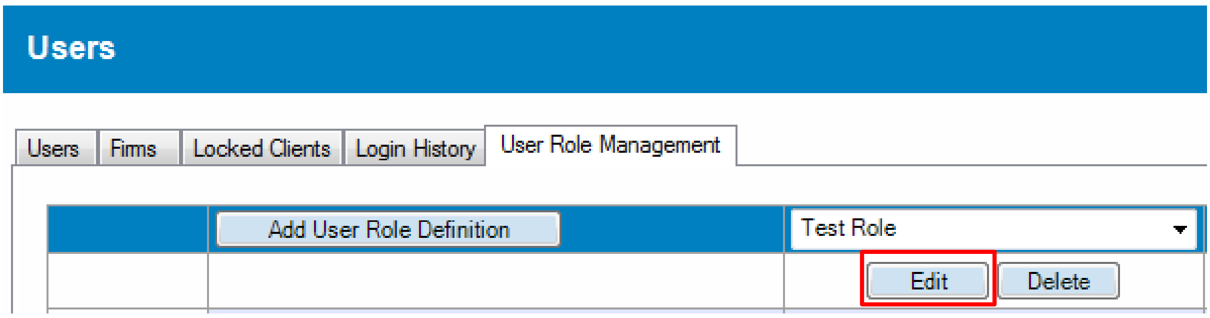


Figure 5: Editing a User Role

This will open the details screen for the selected user role, as shown in figure 4. Once changes have been made to these details, click 'OK' to confirm the changes and update the user role.

Deleting a User Role

To delete a role, select it from one of the dropdowns available in the Setup>Users>User Role Management screen, and click on the 'Delete' button.

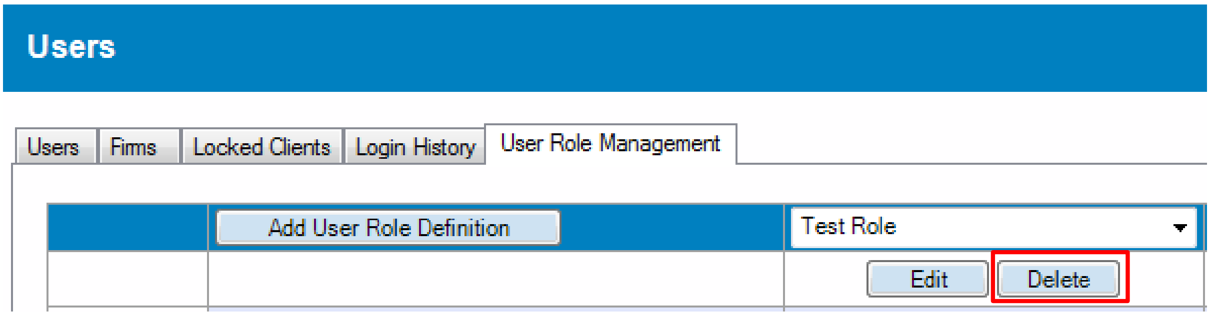


Figure 6: Deleting a User Role

Selecting 'Delete' for a user role will open a prompt to confirm that the user role is to be deleted. Clicking 'Yes' will remove the user role.

Note that it is not possible to delete a user role if any user has that role assigned. In these cases, a prompt will be displayed to confirm this.

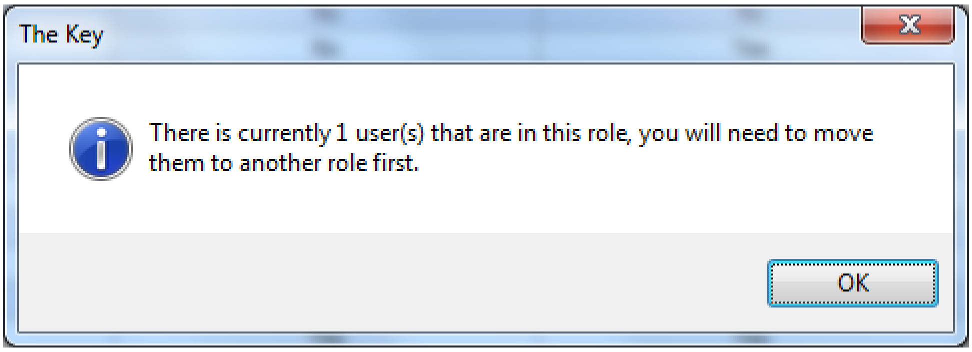


Figure 7: Deleting a User Role When It Is Still Assigned To a User

The Setup>Users>Users tab shows the role assigned to each user.

Allocating a User Role to a User

The user role option appears when opening an individual User Details window from Setup>Users.

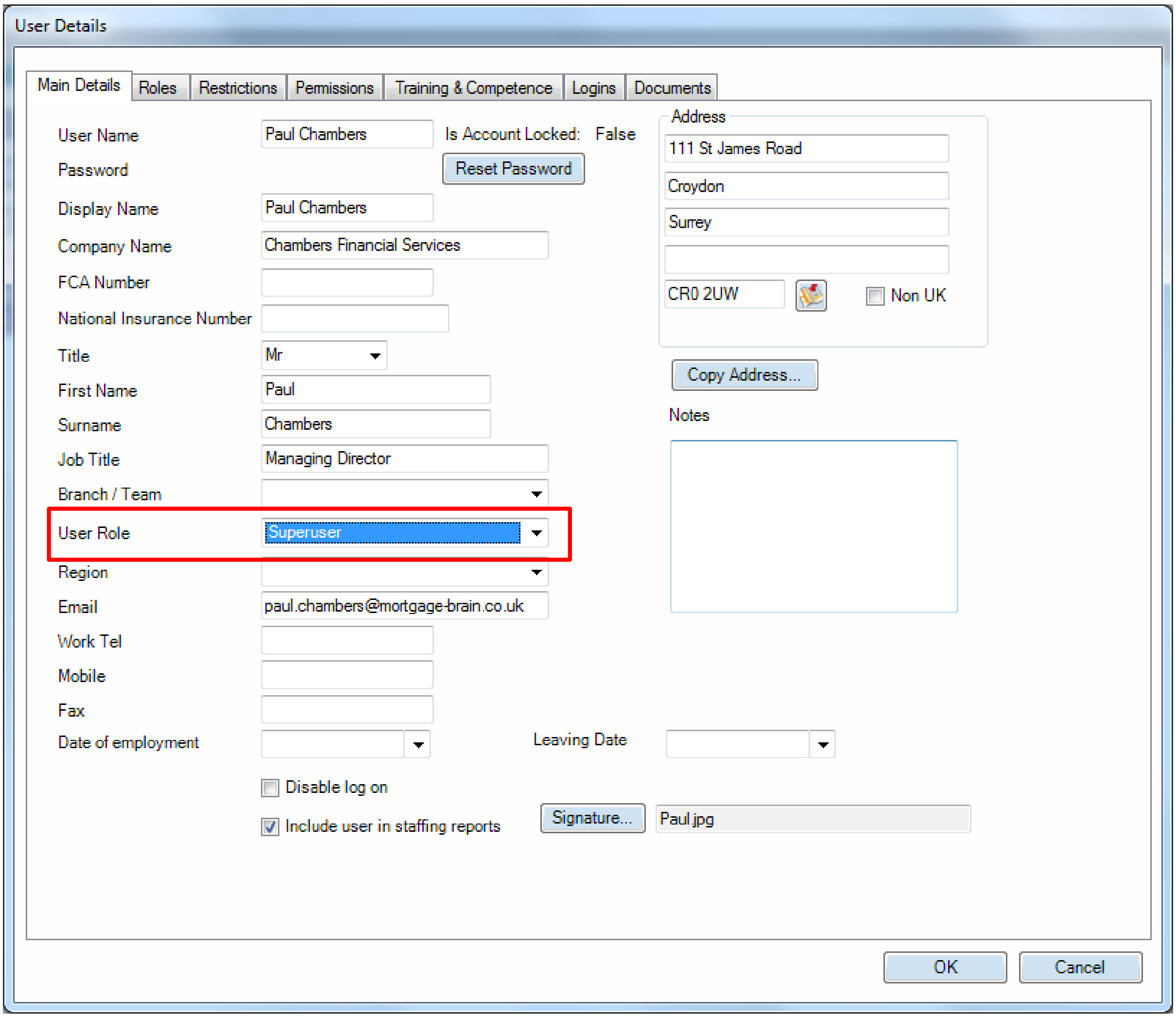


Figure 8: User Details and User Role

The user role to be applied, if any, can be selected from the dropdown highlighted in figure 8. This will override any existing user permissions. User roles can be applied to new users as they are added, or to any existing users.

Custom User Roles

Users are not restricted to only those sets of permissions that are contained within a user role. Individual users can have their own set of permissions if that is required by the business. In these cases, the permissions can be amended within the various tabs of the 'User Details' screen, as outlined in the 'How To Setup User Profiles Within The Key' guide.

In order to identify those users with a bespoke set of permissions, they are allocated a user role status of 'Custom'. This is displayed not only within their specific User Details screen, but also on the summary list of all users.

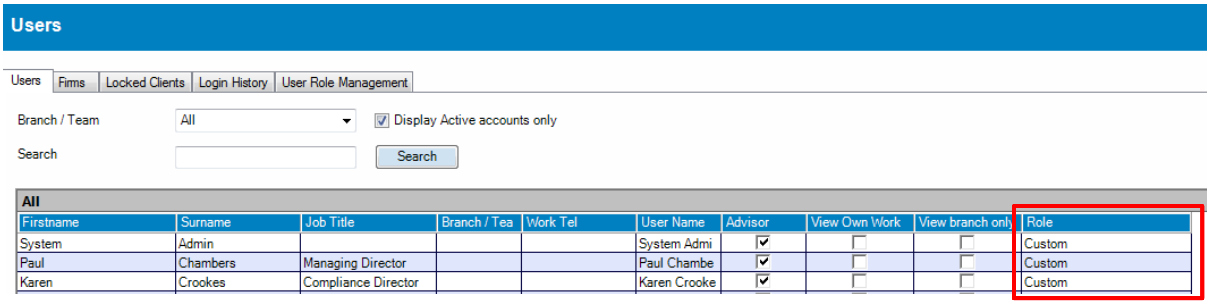


Figure 9: Summary User List Showing User Role

This column will also display any specific user roles allocated to a user.

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