Roles

With the Roles feature, you determine what you want employees to access in your Magaya system and what you want to restrict. There are a lot of options that are easy to set up.

Roles Overview

With the Roles feature, the system administrator can grant or restrict access for an employee (or a group) to different actions in the system. A role can be an action such as giving an employee:

- Access to the company financial reports
- The ability for an employee to assign tracking for your customers
- The ability to process liquidations
- Access to the accounting configuration or other options in the Maintenance > Configuration menu

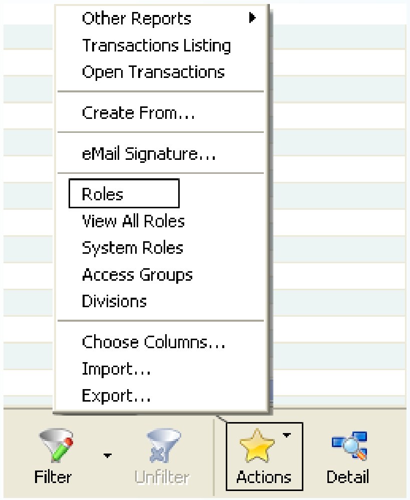
The roles work with the Permissions in the following way: A role that is denied supersedes any other permission an employee might have. For example, if an employee has permission to do one task but the Role you assign restricts the task, then the employee does not have access to that task.

Only a person with administrative rights can set roles.

Add a Role to an Employee

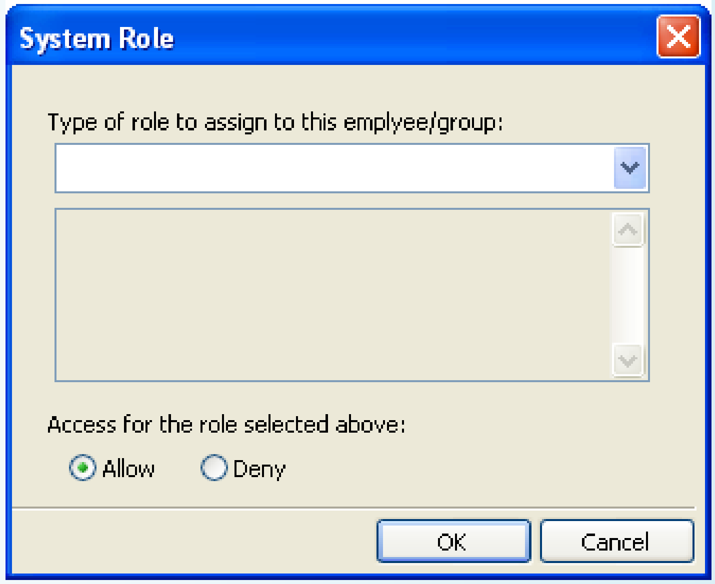
To add a role to an employee's profile in your Magaya system:

1) Go to Maintenance > Employees
2) Select the Employee's name to highlight it.
3) Click the Actions button and select "Roles". (Alternative: Right-click on the employee's name and select "Roles" from the pop-up menu.)

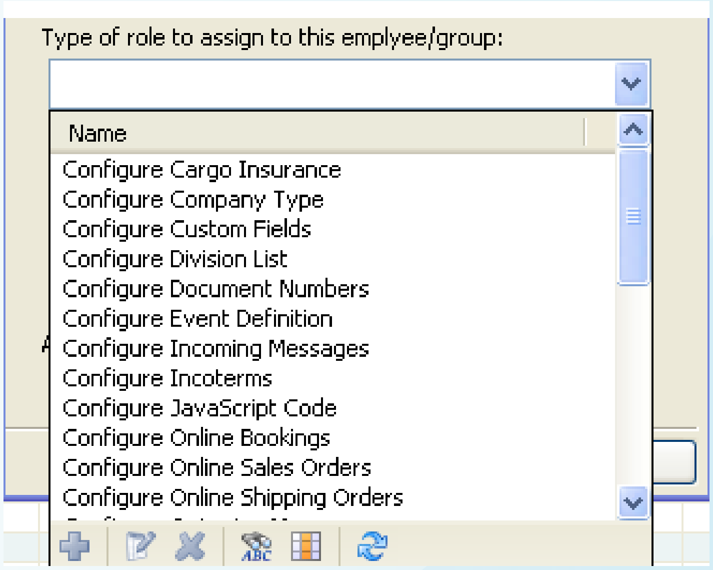


A list opens.

4) Click the Add button in the list. A dialog box opens:



Click the dropdown menu to select a role to assign to this employee (or group). There are many default roles such as those shown in this screenshot:



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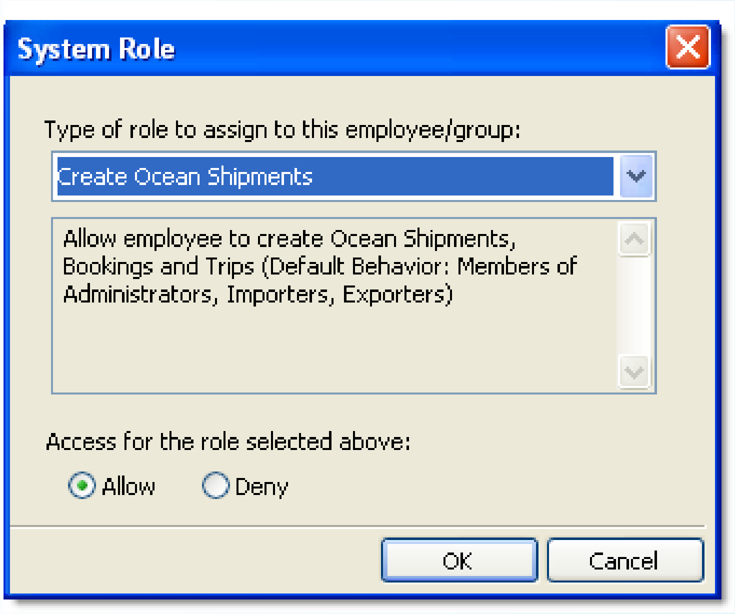
When you select a role, a definition of that role appears:



5) Click “Allow” or “Deny”, and click “OK” to save.
The newly assigned role appears in the list for that employee.

More About Roles

The Actions button has other roles options such as:

- System Roles: Select this option to view the list of roles that are available in the system. To find a role, click on the Filter button and select the Standard Filter.
- View All Roles: Select this option to see all the roles that an employee has. You must click on an employee’s name; otherwise the option is grayed out.

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