The "Introduction & Manage Roles" lesson teaches users how to set up roles and permissions in a system to control access. Different types of roles have varying permissions, which determine access to records and parts of the system. For example, an "accountant" role may have full access to transactions, reports, lists, and specific setup options. Users can customize existing roles or create new ones, and assign them to employees. This ensures that employees only access what they need, improving system security.

Introduction & Managing Roles

* In this lesson, you will learn how to set up roles and permissions to control access to different parts of a system
* **Setup > Users and Roles > Manage Roles**
* Different roles have different permissions, which determine access to certain records
* Permissions include view, edit, create, or full access to various parts of the system
* **Accountant** role may have full access to transactions, reports, lists, and setup related to accounting

Customizing Permissions

* **Customize** next to the role you want to modify
* This will create a copy of the role with the exact permissions, which you can then edit
* **Accountant** role
* After saving the new role, you can view and edit it further

Assigning Roles to Employees

* **Edit**
* **AccessGive Access** dropdown menu
* Employees can have multiple roles, which will expand their abilities and access within the system

Note:

* Be sure to review and adjust permissions based on the specific needs and responsibilities of each role and employee

Managing Users and Roles

* It is possible to manage users and their roles in a system.
* The "Manage Users" feature allows you to view and edit the permissions of different users.
* A user's login audit trail can be viewed to see the times and locations of their logins.
* The "Show Role Differences" feature allows for a comparison of the permissions between different roles.

Permissions

* Permissions determine the level of access that a user has to different parts of the software.
* There are different types of permissions, such as view, edit, create, and full.
* Assigning roles with appropriate permissions to employees helps ensure that they only have access to the parts of the software that are applicable to them.
* This can improve the user experience and maintain the privacy of information within the system.

Audit Process

* Comparing roles side by side can help with the audit process by clearly showing the differences in permissions between them.

Summary

* Managing users and roles, viewing login audit trails, and comparing role differences are all important aspects of managing a system and ensuring that users have the appropriate level of access to the software.

Note:

* The user in this scenario is unable to perform certain actions due to exceeding their access points, and would need to contact their account manager to manage users.