How to create a User Name with a Custom Security Role

These all have varying level of Security Access, with **Administrators** having the most control, **Supervisors** in the middle, and **Employees** having least.

Security Roles are used to give an extra layer of flexibility ontop of the default Roles.

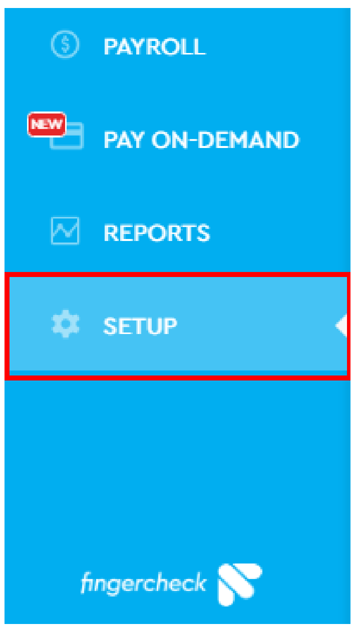
For example, you might want an **Employee** who can view other Employees via the **Employee Tab** or a **Supervisor** who can't see the **Time Sheet**.

This sort of control is useful, and for practice we'll use **Security Roles** to make a Supervisor who can't access the **Time Sheet**

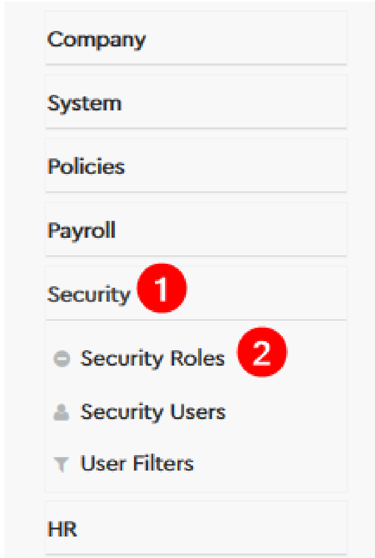
Step 1: Select Security Roles

Let's begin by going to the Security Roles Section.

To do this click on the Setup Tab.



Then click on the **Security Menu** and then click on **Security Menu** > **Security Roles**.



The **Security Roles** section displays various custom Roles that are available in the company's current system.

Step 2: Add a New Security Role

Let's make a new Security Role.

Click on the blue Add+ Button in the Top Right of the Screen.

From here you want to fill in the name of the Security Role in Role.

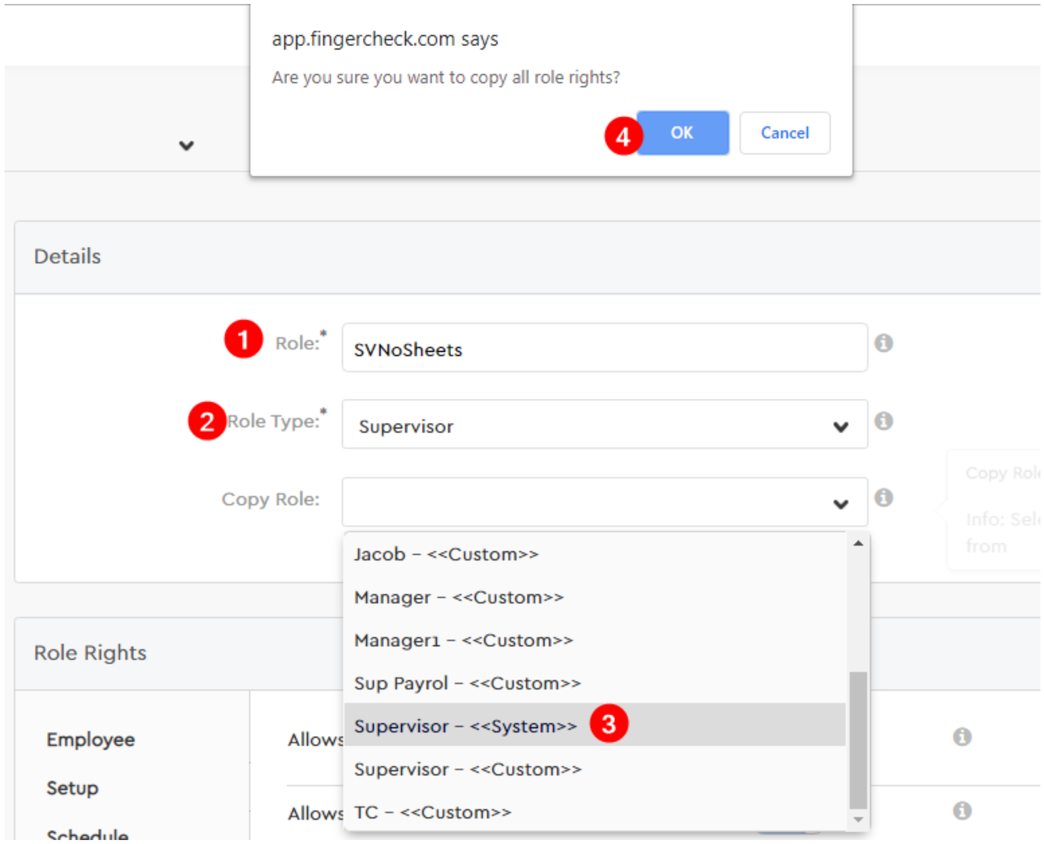
Then set the Role Type to Supervisor

Now we could fill in the Role Rights for this Security Role by manually going through each Role Right individual. But there is a useful function called Copy Role.

Copy Role allows you to select a role to use as a template. It will take all of the Role Rights from that role, and copy them over to this current one.

This helps speed up the Role creation process quite a bit.

In our case we want to pick Supervisor - <<System>> and set it to Fill in the details for this Role



Step 3: Customize the Security Role

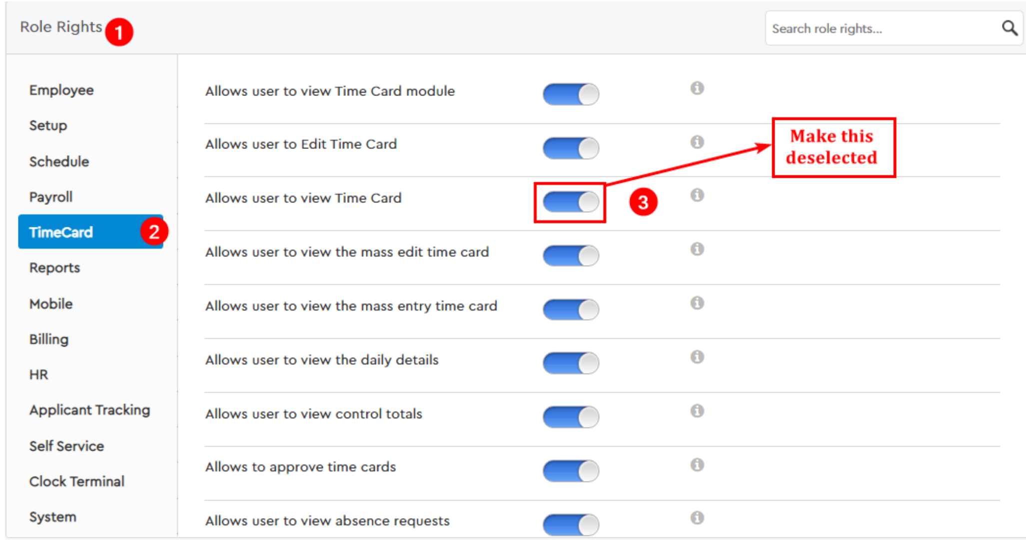
Lots of options are available for customization here.

But for this example we only want to remove the ability to view time sheets.

To do this:

Go to Role Rights > TimeCard

Click on "Allows user to view Time Card" so that it's deselected (Gray Color)



Scroll to the bottom of the screen and click the Save Button in the bottom right

Now it's set!

Step 4: Add the Security Role to an Employee

1. Now the last step is to add this role to a user!
2. Click on Security Menu > Security Users
3. Search for the Employee's Name
4. Go to the bottom of the screen and click the Add button to add a new Role to that Employee
5. Division can remain default
6. Set Role to the Role we just created
7. Click Apply
8. Click Save at the bottom of the screen
9. Then you're done! You've created a custom role to allow that user to not be able to view the Time Sheet

There's a lot you can do with User Roles, this just scratches the surface.

In future lessons we'll dig more deeply into the capabilities of this great feature!

See you then!