

## Known Issue: Role Assignment for “User” object.

**Subject:** - User wants to access another role.

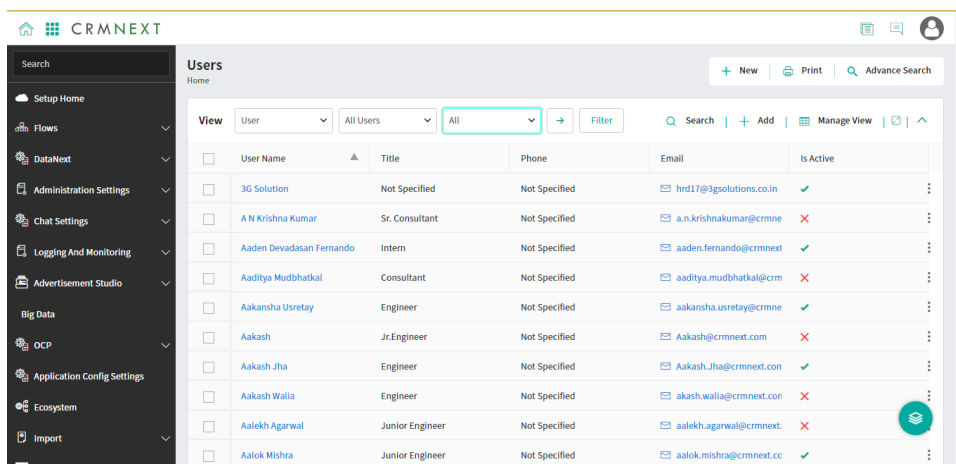
**Issue Details:** - Request has been logged by user for Configuration- change role to Mgr. product Development.

### Resolution Steps: -

We provide a role to the user.

Please follow the steps below: -

Step 1: Go to the user object and search for the user.



View	User Name	Title	Phone	Email	Is Active
<input type="checkbox"/>	3G Solution	Not Specified	Not Specified	hrd17@3gsolutions.co.in	✓
<input type="checkbox"/>	A N Krishna Kumar	Sr. Consultant	Not Specified	a.n.krishnakumar@crmne	✗
<input type="checkbox"/>	Aaden Devadasan Fernando	Intern	Not Specified	aaden.fernando@crmnext	✓
<input type="checkbox"/>	Aaditya Mudbhalkar	Consultant	Not Specified	aaditya.mudbhalkar@crm	✗
<input type="checkbox"/>	Aakash Usretay	Engineer	Not Specified	aakash.usretay@crmne	✓
<input type="checkbox"/>	Aakash	Jr.Engineer	Not Specified	Aakash@crmnext.com	✗
<input type="checkbox"/>	Aakash Jha	Engineer	Not Specified	Aakash.jha@crmnext.com	✓
<input type="checkbox"/>	Aakash Walla	Engineer	Not Specified	akash.walla@crmnext.com	✗
<input type="checkbox"/>	Aalekh Agarwal	Junior Engineer	Not Specified	aalekh.agarwal@crmnext.	✗
<input type="checkbox"/>	Aalok Mishra	Junior Engineer	Not Specified	aalok.mishra@crmnext.cc	✓

Users

Home

+ New

Print

Advance Search

View

User

All Users

All

Filter

Search

Add

Manage View

<input type="checkbox"/>	User Name	Title	Phone	Email	Is Active	
<input type="checkbox"/>	Mr. Naveen Kumar	Team Lead	Not Specified	Naveen.k.verma@crmnex	✓	
<input type="checkbox"/>	Naveen kumar Galipelli	Associate Lead Consultant	Not Specified	naveen.galipelli@crmnex	✗	
<input type="checkbox"/>	Naveen Kumar Singh	Graduate Engineer Trainee	Not Specified	naveen.singh@crmnex.cc	✓	

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0 1 2 3 4 5 6 7 8 9

Showing 1-3 Records

User Delete Log

Mass Update

Mass Update

Travel Import

Exit Import

Import Promotion Data

## Step 2: Open that Particular user.

Employee

Home > Detail

Geography Mapping

Geography Mapping

Manage Team

Id 00003299	Name Naveen Kumar Singh	Mobile + 844 860 8269	Sub Group PDG	Grade E1
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BASIC

TRAVEL DESK

EXIT

HEALTH INSURANCE

TAG

OTHERS

HISTORY

SALES/KAM SPECIFIC DETAILS

Key Information

Id

00003299

Name

Naveen Kumar Singh

Short Name

Naveen Kumar Singh

Login ID

naveen.singh@crmnex.com

Email ID

naveen.singh@crmnex.com

Mobile

+ 844 860 8269

Title

Graduate Engineer Trainee

Group

Product

Band

1

Location

Noida

Reports To

Avinash Gaur

Employee Experience (At the time of joining)

0.0

Employee date of joining

02-08-2021

Active

✓

Email Client User

✗

Disable Login Access

✗

Mobile User

✗

Employee Code

ST357/21

Category\_prj

Not Specified

Sub Group

PDG

Grade

E1

Default Territory

Not Specified

Is Offline User

✗

## Step 3: Click on the Edit button.

Employee

Home > Detail > Edit

BASIC

USER SCOPE

ACCESS PERMISSION

TRAVEL DESK

EXIT

HEALTH INSURANCE

TAG

OTHERS

SALES/KAM SPECIFIC DETAILS

User Type

Employee

Name

Naveen

Kumar

Singh

Short Name

Naveen Kumar Singh

Active

✓

LoginID

naveen.singh@crmnex.com

Disable Login Access

Email ID

naveen.singh@crmnex.com

Email Client User

Mobile

+ 844 860 8269

Mobile User

Title

Graduate Engineer Trainee

Employee Code

ST357/21

Group

Product

Sub Group

PDG

Default Territory

Save

Cancel

**Step 4:** Look for Access Permission and Add the role, as mentioned in case.

The screenshot shows the 'Employee' management interface with the 'ACCESS PERMISSION' tab selected. The interface includes a breadcrumb trail (Home > Detail > Edit) and a top navigation bar with tabs: BASIC, USER SCOPE, ACCESS PERMISSION (active), TRAVEL DESK, EXIT, HEALTH INSURANCE, TAG, OTHERS, and SALES/KAM SPECIFIC DETAILS. Below the tabs is a search bar labeled 'Roles' and a list of roles on the left: Admin, Admin Next, Administrator, Advisor, AM Solution Delivery, API Automation, Asst. Managers (Sales), Auditor, Build Master, Business Administrator, and CEO. On the right, there is a box containing 'DataNext Eng Development' and 'Engr Product Development'. Arrows indicate the ability to move roles between the two boxes. At the bottom, there are 'Save' and 'Cancel' buttons. A note at the bottom states: 'You can drag the options in the right box up and down through mouse.'

**Step 5:** Click the save button.

**Note: Please refer to the case Case id: - 00354385 for more information.**