

How to Create Roles

Role Update

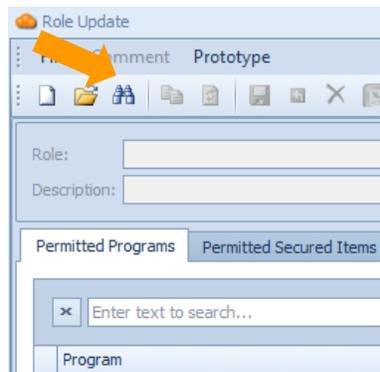
Roles are useful when trying to allow or limit access of certain users to certain features of the system. For example, accounts personnel would probably have no need to have access to the manufacturing area of the program and vice versa.

Once a Role is created, it can be assigned to a user in User Update.

It is advised that this functionality only be used after the user has a firm grasp on the different features that the system offers.

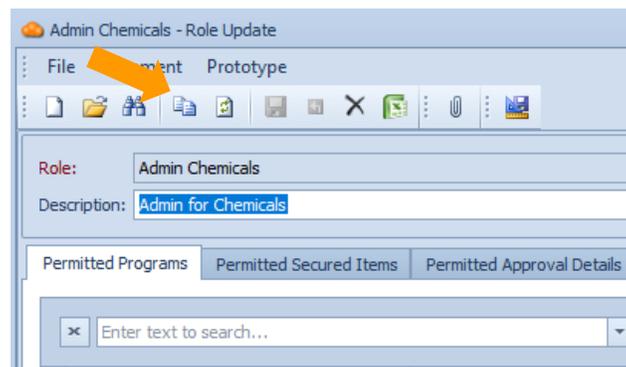
To create a new role, go to *Administration >> Role Update*

Select Find



Select "Admin for Chemicals". Note this is the default admin role.

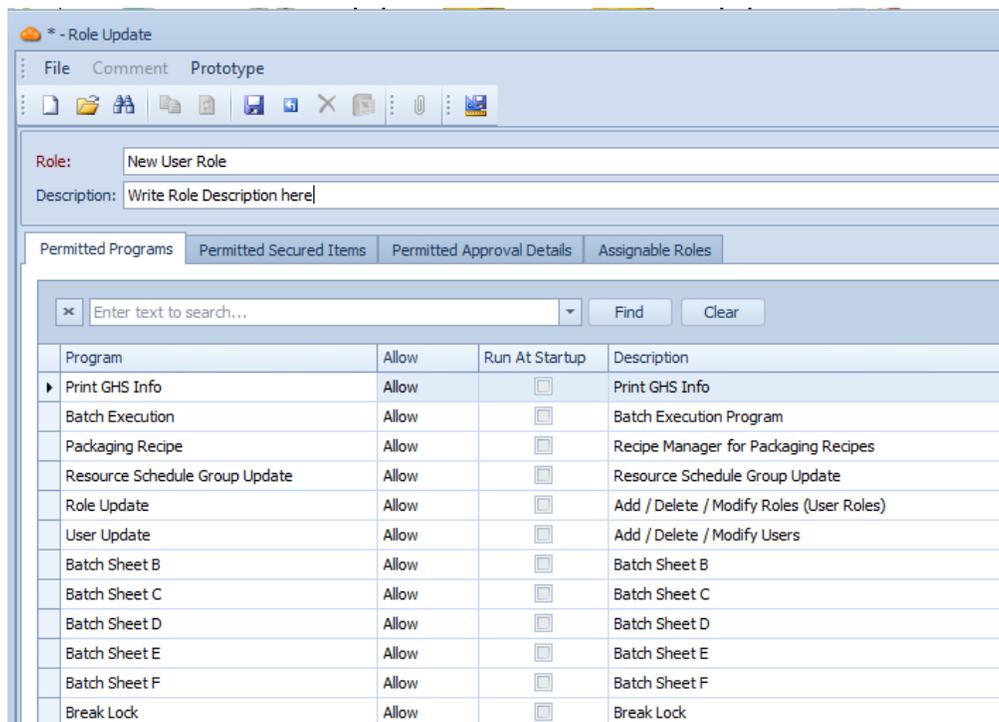
Click the "Clone" button.



This creates a copy of the role. Enter the role name in the **Role** field and write a short description in the **Description** field.

Permitted Programs

In this tab you can set different permission levels for each program for this user. A program is any system function that can either be launched from the main menu or a context menu. Example: Purchase Orders, Print Container Label



Program	Allow	Run At Startup	Description
▶ Print GHS Info	Allow	<input type="checkbox"/>	Print GHS Info
Batch Execution	Allow	<input type="checkbox"/>	Batch Execution Program
Packaging Recipe	Allow	<input type="checkbox"/>	Recipe Manager for Packaging Recipes
Resource Schedule Group Update	Allow	<input type="checkbox"/>	Resource Schedule Group Update
Role Update	Allow	<input type="checkbox"/>	Add / Delete / Modify Roles (User Roles)
User Update	Allow	<input type="checkbox"/>	Add / Delete / Modify Users
Batch Sheet B	Allow	<input type="checkbox"/>	Batch Sheet B
Batch Sheet C	Allow	<input type="checkbox"/>	Batch Sheet C
Batch Sheet D	Allow	<input type="checkbox"/>	Batch Sheet D
Batch Sheet E	Allow	<input type="checkbox"/>	Batch Sheet E
Batch Sheet F	Allow	<input type="checkbox"/>	Batch Sheet F
Break Lock	Allow	<input type="checkbox"/>	Break Lock

Permission Level Description:

Allow: Lets the user access the full functionality of that program.

Read Only: Lets the user view the program and the details of any data stored, but not edit it.

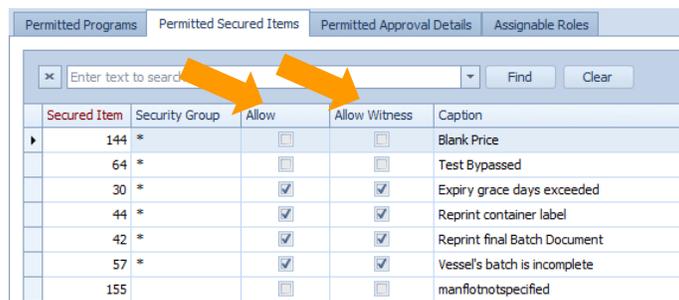
(Blank): Hides the program from the user and prevents them from accessing it. To do this, click on the **Allow** area and click **Backspace** on your keyboard. This should result in an empty field.

It is important to note that if you remove a program from the role assigned to your own user account, you cannot put it back.

Permitted Secured Items

This tab displays the secured items that are available for use. User access to the different secured items can be configured by checking or unchecking them in the **Allow** column. The **Allow Witness** column determines if the user can be an applicable witness to the specific secured item.

Secured Items define security requirements for actions and events that take place within Mar-Kov. Actions are things that a user can do such as "Save", while events are system-generated conditions, such as "yield is out of tolerance". **Secured items** can require permission to be performed by a user, and can also require a Signature, a Witness Signature, or Reason.



Secured Item	Security Group	Allow	Allow Witness	Caption
144 *		<input type="checkbox"/>	<input type="checkbox"/>	Blank Price
64 *		<input type="checkbox"/>	<input type="checkbox"/>	Test Bypassed
30 *		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Expiry grace days exceeded
44 *		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Reprint container label
42 *		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Reprint final Batch Document
57 *		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Vessel's batch is incomplete
155		<input type="checkbox"/>	<input type="checkbox"/>	manflotnotspecified

Permitted Approval Details

This tab defines which Approval Details may be approved or rejected by users with this role. **Approvals** are requirements for a user signature, allowing that particular user to approve particular actions, such as publishing a recipe or releasing an order.



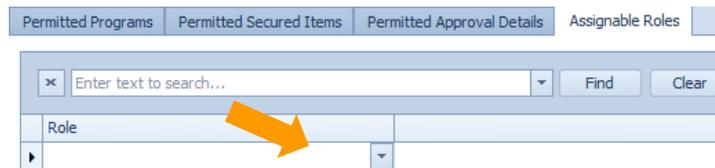
Approval Code	Security Group	Description	Allow
Release Order	OTC	Warehouse	<input checked="" type="checkbox"/>
Release Order	OTC	Production	<input type="checkbox"/>
Release Order	OTC	Final approval	<input type="checkbox"/>

Checking or unchecking the **Allow** field grants them approval.

Assignable Roles

The *Assignable Roles* tab describes which roles this new role is able to give. This feature is useful if the role being created has some administrative responsibility and would need to create roles themselves.

This can be achieved by clicking the dropdown menu and selecting the appropriate role. Clicking on the empty space below adds another assignable role.



Role
<input type="text"/>

Note that to assign the newly created role to a user, you must then *Update* your own role (most likely Admin), and add the newly created role in this tab.

Save your progress by clicking the save button or **Ctrl + S** on your keyboard.

After these steps are completed, you are now able to assign the newly created role to a user. For more information about updating a User's Roles, please refer to the Role Update section.