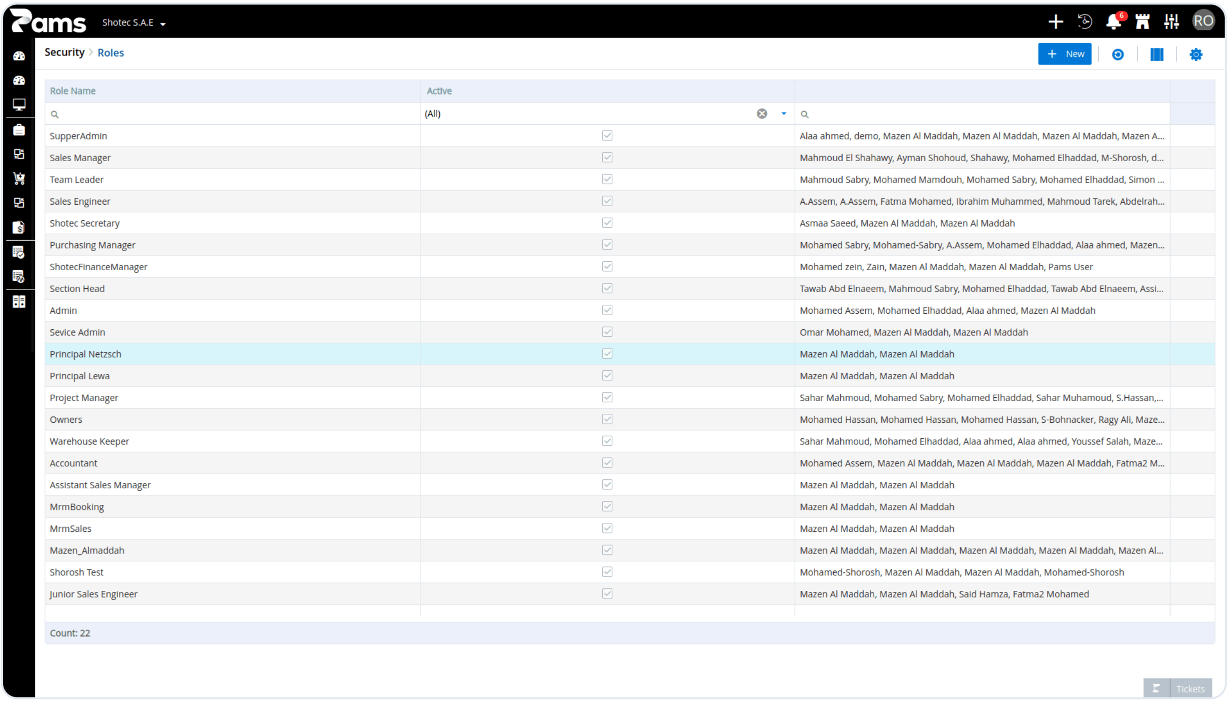
Roles

July 29, 2026

Roles

Applications › Security Section › Roles



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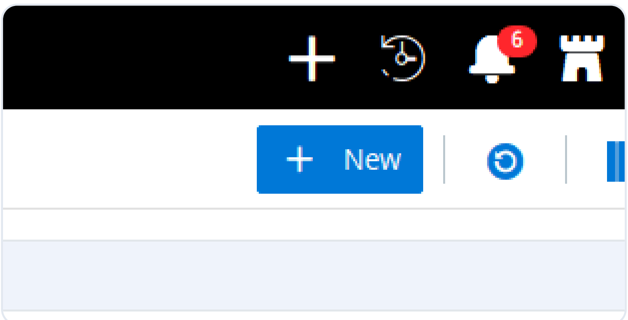


Overview

Roles are used to maintain the role records available in the Security Section. Use this page when you need to review existing roles, create a new role, locate a role by name, or remove a role that is no longer required. Sales representatives, account managers, project managers, purchasing officers, warehouse managers, and finance officers may use roles to identify the role records relevant to their work area.

Settings

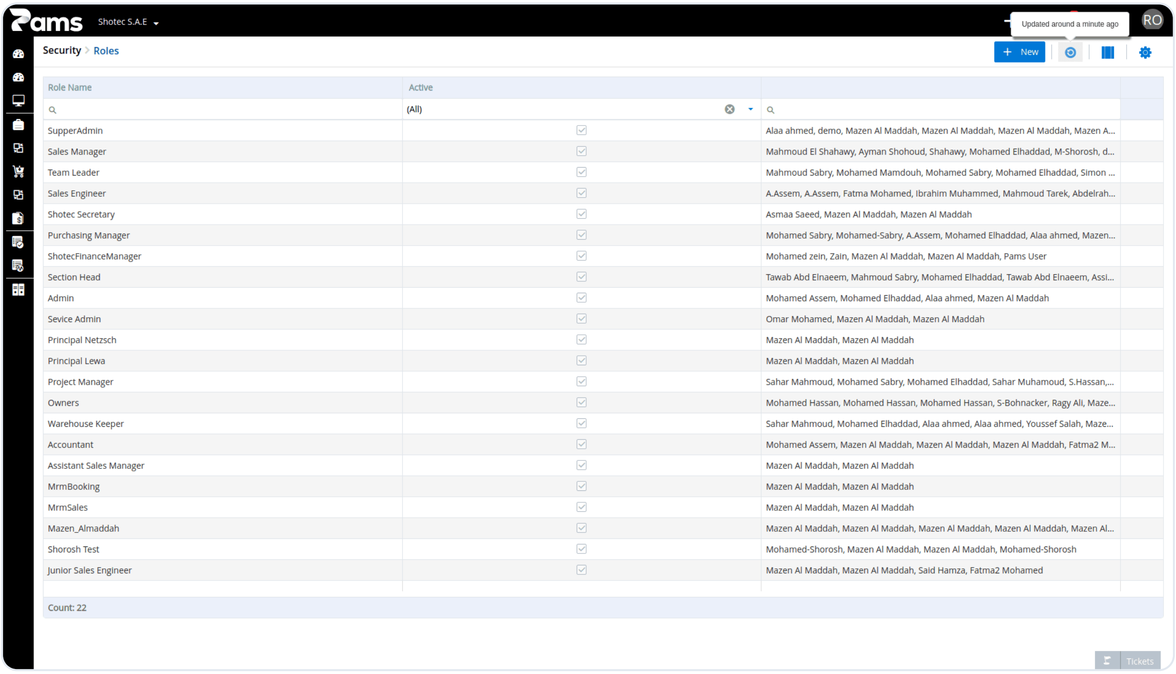
Before maintaining role records, set up the list view so that you can locate and review records efficiently. The Roles screen provides layout controls for selecting and maintaining the current display layout.

Control	Purpose
Layout name	Identifies the current layout.
Select...	Opens the available selection control.
Standard Layout	Selects the standard layout.
Add Layout	Adds a layout.
Save	Saves the layout or current changes.
Update Current	Updates the current layout.
Delete Current	Deletes the current layout.
Columns Chooser	Opens the control for choosing displayed columns.
icn icn-settings	Opens layout or display settings.

> **Note:** Use a recognisable **Layout name** when maintaining more than one layout. This helps you distinguish a standard display from a display created for a particular review task.

To prepare the Roles list:

1. Open **Security Section** > **Roles**.



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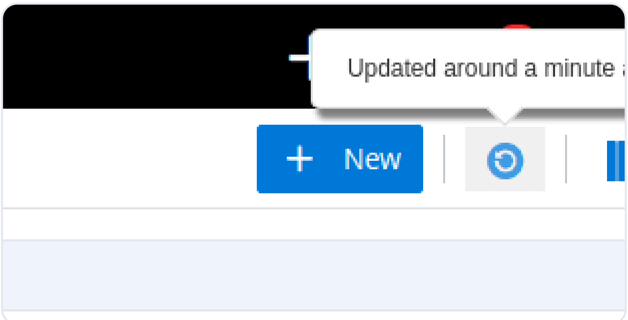
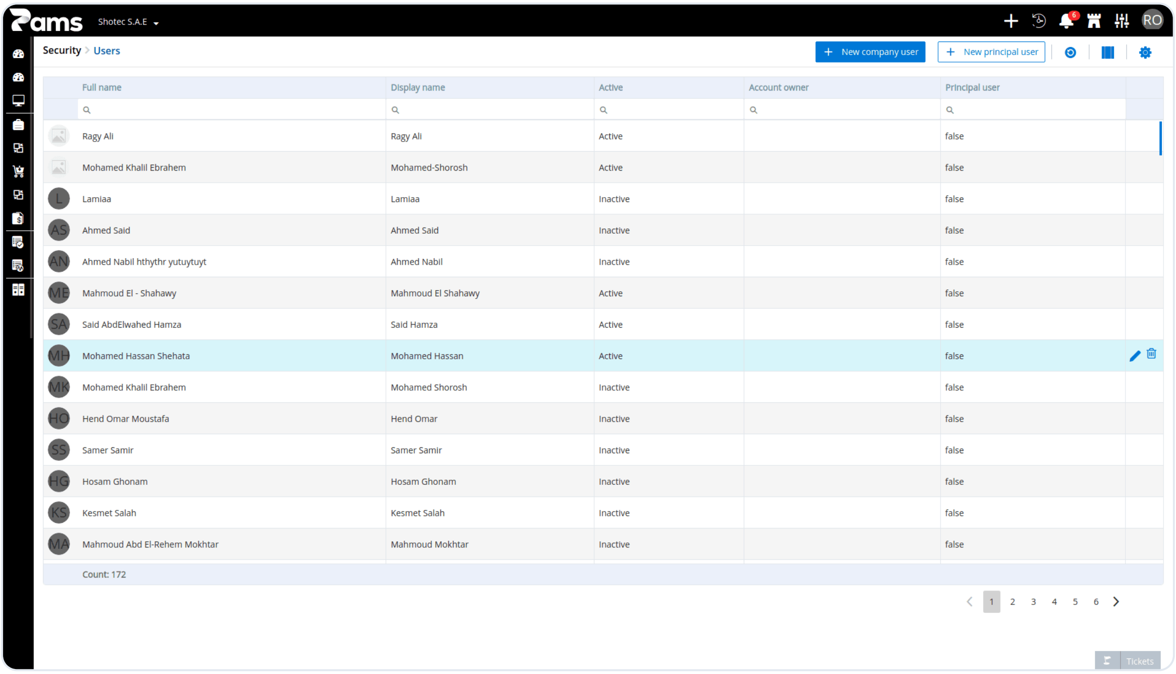


2. Decide whether the standard display is sufficient.
   - To return to the standard display, select **Standard Layout**.
   - To create a separate display arrangement, select **Add Layout** and provide a **Layout name**.
   - To change the active layout, use **Columns Chooser** or **icn icn-settings**, then select **Update Current** to retain the changes.
   - If a layout is no longer needed, select **Delete Current**.
3. Use **Cancel** if you decide not to retain the layout action currently in progress. Use **Save** only when you intend to keep the current change.

Workflow

Locate an existing role or create a new one

1. On the Roles screen, decide whether the role already exists.
    - To find an existing record, enter a value in **Search** and use the available **Select...** or **Select** controls to narrow or choose records.
    - Review the **Role Name** and **Active** information shown in the list before creating a replacement role.



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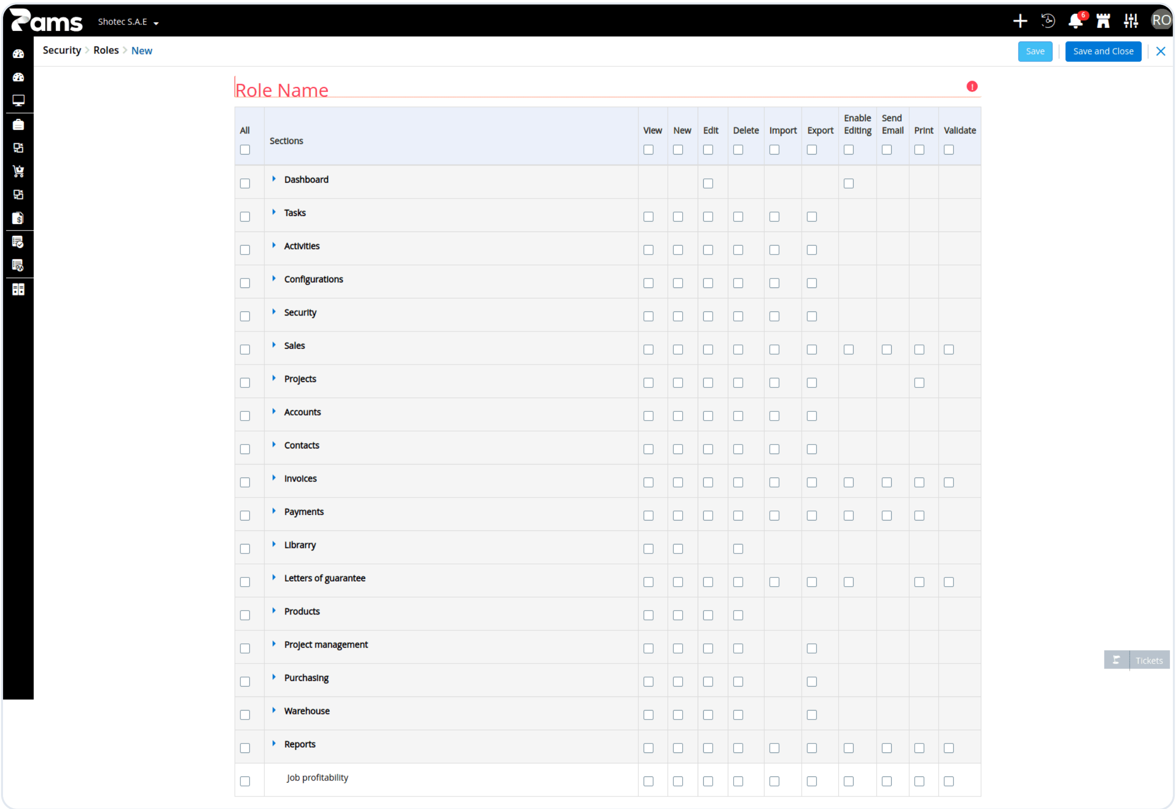
2. If the required role does not exist, select **New**.
3. In the new Roles record, enter the role identifier in **Role Name**. Use a clear, business-specific name that users can recognise, such as a role for Sales, PM, Purchasing, Warehouse, or Finance work.



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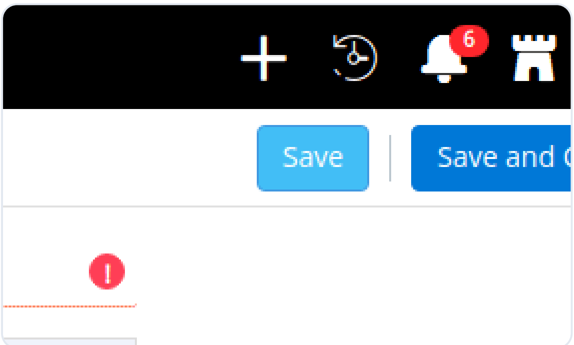
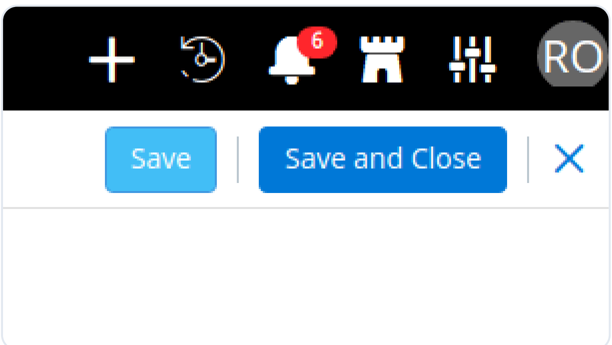




4. Decide how to finish the new record.

- Select **Save** when you want to save the role and continue working in the record.
- Select **Save and Close** when the role is complete and you want to return to the Roles list.
- Use **Attach** when you need to use the attachment control available on the record.
- Use **Tickets** when you need the ticket control available from the record.
- Select **Ok** to confirm the applicable action.

> **Tip:** Create one clearly named role rather than several similarly named records. Distinct role names make searching and selection more reliable.

Review, retain, or delete a role

5. Return to **Security Section** > **Roles** and use **Search** to locate the role by its **Role Name**.

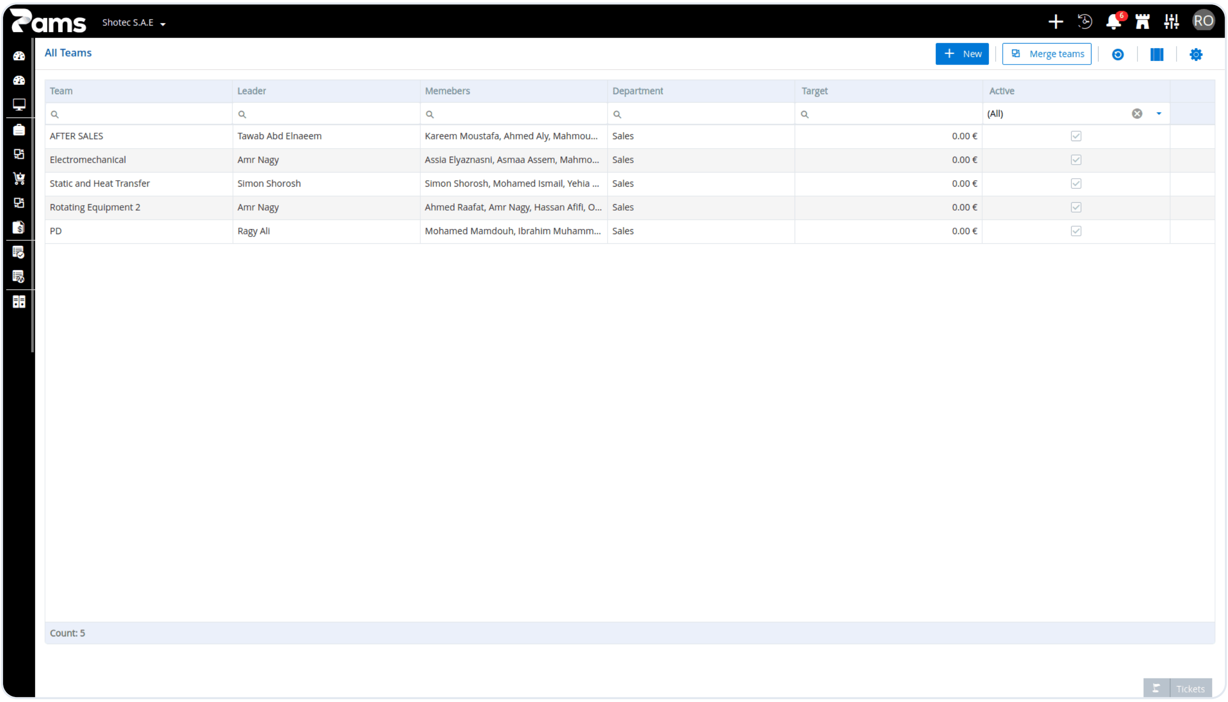
6. Decide whether to retain or remove the role.

    - Retain the record when it remains relevant to your business operations.
    - To remove a record, use **Select** to identify the applicable record and select **Delete**.
    - Do not use **Delete** merely to correct a display layout; use **Delete Current** only for the current layout.

7. Use **icn-update** when you need the update action available from the Roles screen. Review the selected record and layout before saving further changes.

> **Warning:** The screen provides separate deletion actions for role records and layouts. Confirm whether you are using **Delete** or **Delete Current** before proceeding.

Teams



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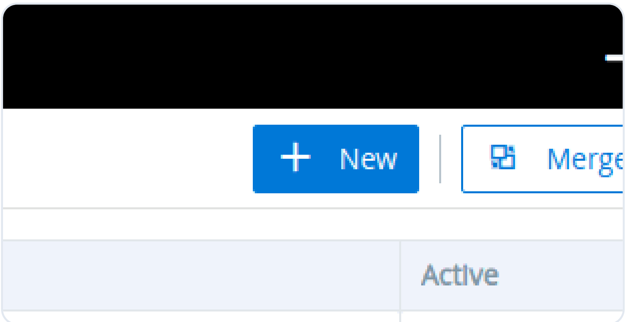

The **teams** tab presents role information in the team view of the Roles screen. Use this tab when reviewing role records in relation to teams and when comparing the displayed role names with the available team-oriented records.

The screen provides application-area controls such as **Dashboard**, **Reports**, **My Desk**, **Sales**, **PM**, **Purchasing**, **Warehouse**, **Finance**, **Tasks**, **Activities**, and **Data**. These controls are available while working in the Roles area. No control is provided in the available screen information for moving a record into or out of the **teams** tab.

Users

The **users** tab presents role information in the user view of the Roles screen. Use it to review the role records shown for users and to locate entries using **Search**, **Select...**, or **Select** where required.

Review the listed **Role Name** and **Active** information before making a decision to create or delete a role. No control is provided in the available screen information for moving a record into or out of the **users** tab.

Examples

A purchasing officer needs a role record named `Purchasing Coordinator`.

1. Open **Security Section** > **Roles**.
2. Enter `Purchasing Coordinator` in **Search** to confirm that the role does not already appear in the Roles list.
3. Select **New**.
4. Enter `Purchasing Coordinator` in **Role Name**.
5. Select **Save and Close** to save the completed role and return to the Roles screen.
6. Enter `Purchasing Coordinator` in **Search** and verify that the new role is visible in the list.
7. Open the **teams** tab or **users** tab as appropriate to review the role in the available team or user view.

Tips

> **Tip:** Use **Standard Layout** when you need to return to the default display before reviewing role records.

> **Note:** Use **Columns Chooser** only when the currently displayed columns do not provide the information you need for the review.

> **Warning:** Use **Save and Close** only after entering the intended **Role Name**. If you need to continue reviewing the new record, use **Save** instead.

Troubleshooting

Symptom	Likely cause	Fix
The required role is not visible in the list.	The list is not filtered to the required record, or the current	Use **Search** with the role name. If necessary, select **Standard Layout** or

Symptom	Likely cause	Fix
	layout does not show the expected information.	use **Columns Chooser** to review the display.
A new role record remains open after saving.	**Save** was selected instead of **Save and Close**.	Select **Save and Close** when the role entry is complete and you want to return to the list.
The wrong display arrangement is shown.	A non-standard layout is active.	Select **Standard Layout**, or select the appropriate **Layout name** and use **Update Current** if the current layout should be retained.
A role or layout is about to be removed.	The deletion action may not match the intended item.	Confirm whether you need **Delete** for the selected record or **Delete Current** for the current layout before proceeding.

Related pages

- Security Section — Overview
- Teams
- Security Section — Learning Path
- Users