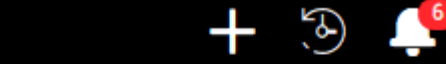


Roles

Security > Roles	
+ New	
Role Name	Active
q	(All)
SupperAdmin	☒
Sales Manager	☒
Team Leader	☒
Sales Engineer	☒
Shotec Secretary	☒
Purchasing Manager	☒
ShotecFinanceManager	☒
Section Head	☒
Admin	☒
Sevice Admin	☒
Principal Netzsch	☒
Principal Lewa	☒
Project Manager	☒
Owners	☒
Warehouse Keeper	☒
Accountant	☒
Assistant Sales Manager	☒
MrmBooking	☒
MrmSales	☒
Mazen_Almaddah	☒
Shorosh Test	☒
Junior Sales Engineer	☒
Count: 22	



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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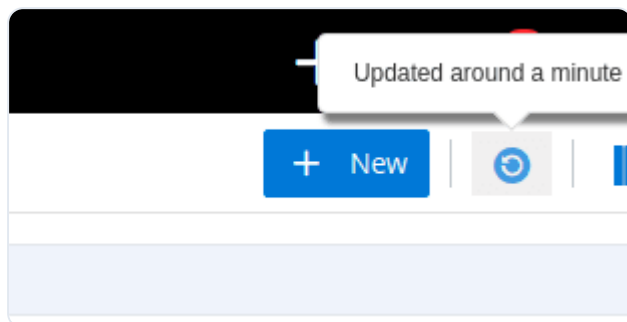
Security > Roles

Role Name	Active	
Q	(All)	Q
SupperAdmin	☒	Alaa ahmed, demo, Mazen Al Maddah, Mazen Al Maddah, Mazen A...
Sales Manager	☒	Mahmoud El Shahawy, Aymen Shohoud, Shahawy, Mohamed Elhaddad, M-Shorosh, d...
Team Leader	☒	Mahmoud Sabry, Mohamed Mamdouh, Mohamed Sabry, Mohamed Elhaddad, Simon ...
Sales Engineer	☒	A.Assem, A.Assem, Fatma Mohamed, Ibrahim Muhammed, Mahmoud Tarek, Abdelrah...
Shotec Secretary	☒	Asmaa Saeed, Mazen Al Maddah, Mazen Al Maddah
Purchasing Manager	☒	Mohamed Sabry, Mohamed-Sabry, A.Assem, Mohamed Elhaddad, Alaa ahmed, Mazen...
ShotecFinanceManager	☒	Mohamed zein, Zain, Mazen Al Maddah, Mazen Al Maddah, Pams User
Section Head	☒	Tawab Abd Elnaeem, Mahmoud Sabry, Mohamed Elhaddad, Tawab Abd Elnaeem, Asst...
Admin	☒	Mohamed Assem, Mohamed Elhaddad, Alaa ahmed, Mazen Al Maddah
Sevice Admin	☒	Omar Mohamed, Mazen Al Maddah, Mazen Al Maddah
Principal Netzs	☒	Mazen Al Maddah, Mazen Al Maddah
Principal Lewa	☒	Mazen Al Maddah, Mazen Al Maddah
Project Manager	☒	Sahar Mahmoud, Mohamed Sabry, Mohamed Elhaddad, Sahar Muhamoud, S.Hassan,...
Owners	☒	Mohamed Hassan, Mohamed Hassan, Mohamed Hassan, S-Bohnacker, Ragy Ali, Maze...
Warehouse Keeper	☒	Sahar Mahmoud, Mohamed Elhaddad, Alaa ahmed, Alaa ahmed, Youssef Salah, Maze...
Accountant	☒	Mohamed Assem, Mazen Al Maddah, Mazen Al Maddah, Mazen Al Maddah, Fatma2 M...
Assistant Sales Manager	☒	Mazen Al Maddah, Mazen Al Maddah
MrmBooking	☒	Mazen Al Maddah, Mazen Al Maddah
MrmSales	☒	Mazen Al Maddah, Mazen Al Maddah
Mazen_Almaddah	☒	Mazen Al Maddah, Mazen Al Maddah, Mazen Al Maddah, Mazen Al Maddah, Mazen AL...
Shorosh Test	☒	Mohamed-Shorosh, Mazen Al Maddah, Mazen Al Maddah, Mohamed-Shorosh
Junior Sales Engineer	☒	Mazen Al Maddah, Mazen Al Maddah, Said Hamza, Fatma2 Mohamed

Count: 22

Tickets

Roles — Security Section > Roles



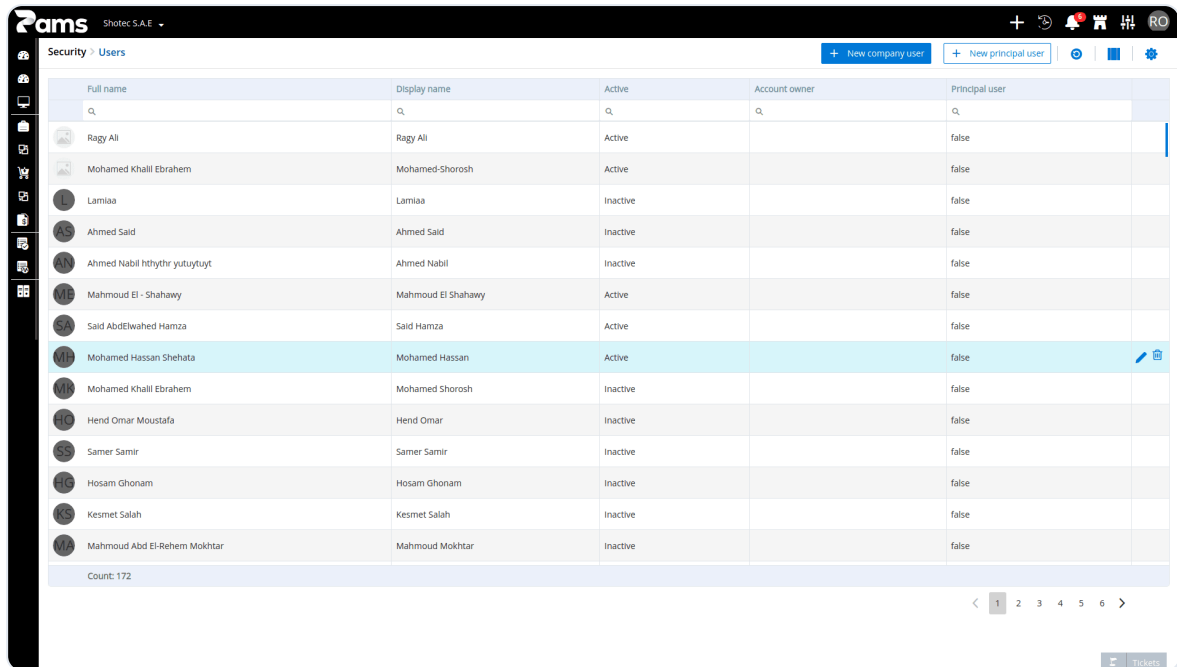
- Decide whether the standard display is sufficient.
 - To return to the standard display, select **Standard Layout**.
 - To create a separate display arrangement, select **Add Layout** and provide a **Layout name**.
 - To change the active layout, use **Columns Chooser** or **icn icn-settings**, then select **Update Current** to retain the changes.
 - If a layout is no longer needed, select **Delete Current**.
- 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.



The screenshot shows the 'Security > Users' page in the Pams application. The page has a dark sidebar on the left with various icons. The main content area displays a table of users. At the top right, there are buttons for '+ New company user' and '+ New principal user'. The table has five columns: 'Full name', 'Display name', 'Active', 'Account owner', and 'Principal user'. The 'Full name' and 'Display name' columns have search filters. The 'Active' column shows 'Active' or 'Inactive' status. The 'Account owner' and 'Principal user' columns show names or 'false'. The table is currently displaying 17 users, with the first 10 visible. The user 'Mohamed Hassan Shehata' is highlighted in blue. At the bottom of the table, it says 'Count: 172'. There is a pagination control at the bottom right showing page 1 of 6.

Full name	Display name	Active	Account owner	Principal user
Ragy Ali	Ragy Ali	Active		false
Mohamed Khalil Ebrahim	Mohamed-Shorosh	Active		false
Lamiaa	Lamiaa	Inactive		false
Ahmed Said	Ahmed Said	Inactive		false
Ahmed Nabil Ithiyth yutuyt	Ahmed Nabil	Inactive		false
Mahmoud El - Shahawy	Mahmoud El Shahawy	Active		false
Said Abdelwahed Hamza	Said Hamza	Active		false
Mohamed Hassan Shehata	Mohamed Hassan	Active		false
Mohamed Khalil Ebrahim	Mohamed Shorosh	Inactive		false
Hend Omar Moustafa	Hend Omar	Inactive		false
Samer Samir	Samer Samir	Inactive		false
Hosam Ghonam	Hosam Ghonam	Inactive		false
Kesmet Salah	Kesmet Salah	Inactive		false
Mahmoud Abd El-Rehem Mokhtar	Mahmoud Mokhtar	Inactive		false

Roles — Security Section > Roles

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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Security > Roles > New

Save Save and Close X

Role Name

All

Sections

View

New

Edit

Delete

Import

Export

Enable Editing

Send Email

Print

Validate

☐	Dashboard	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
☐	Tasks	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
☐	Activities	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
☐	Configurations	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
☐	Security	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
☐	Sales	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
☐	Projects	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
☐	Accounts	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
☐	Contacts	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
☐	Invoices	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
☐	Payments	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
☐	Library	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
☐	Letters of guarantee	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
☐	Products	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
☐	Project management	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
☐	Purchasing	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
☐	Warehouse	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
☐	Reports	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
☐	Job profitability	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

Tickets

Roles — Security Section > Roles > Roles

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Save

Save and Close

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Save

Save and Close

X

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

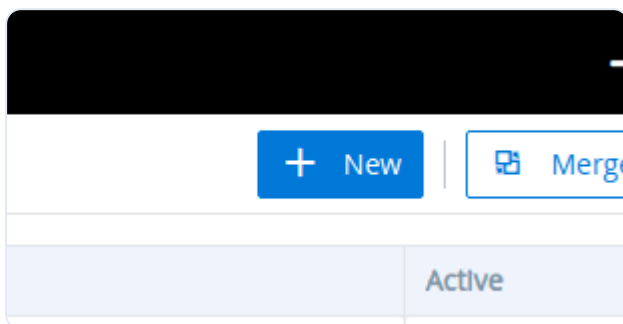
5. Return to **Security Section > Roles** and use **Search** to locate the role by its **Role Name**.
6. Decide whether to retain or remove the role.
 - Retain the record when it remains relevant to your business operations.
 - To remove a record, use **Select** to identify the applicable record and 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

Team	Leader	Members	Department	Target	Active
AFTER SALES	Tawab Abd Elnaeem	Kareem Moustafa, Ahmed Aly, Mahmoud...	Sales	0.00 €	☒
Electromechanical	Amr Nagy	Assia Elyaznasni, Asmaa Assem, Mahmo...	Sales	0.00 €	☒
Static and Heat Transfer	Simon Shorosh	Simon Shorosh, Mohamed Ismail, Yehia ...	Sales	0.00 €	☒
Rotating Equipment 2	Amr Nagy	Ahmed Raafat, Amr Nagy, Hassan Afifi, O...	Sales	0.00 €	☒
PD	Ragy Ali	Mohamed Mamdouh, Ibrahim Muhammm...	Sales	0.00 €	☒

Roles — Security Section > Roles



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](#)