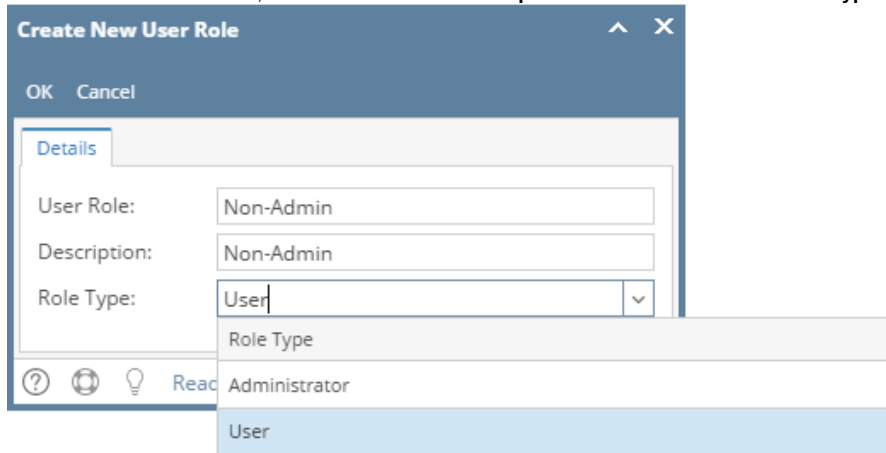


# How to Add User Role Type

Only **Admin** type users are allowed to have access to this screen. They have the ability to control and assign what permissions will be given to all the other users on each of the menus within the system.

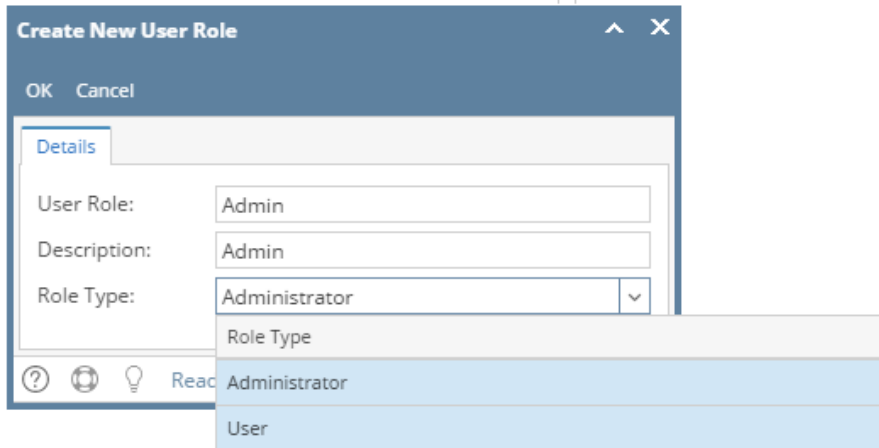
Here are the steps on How to Add different User Role types:

1. Log in as an **Admin user**
2. On user's menu panel, go to **System Manager** folder then click **User Roles**
3. Click the **New** action button to open a new record.
  - a. To create a **Non-admin** role, enter **User Role** and **Description** and select **User** on the **Role Type** drop down



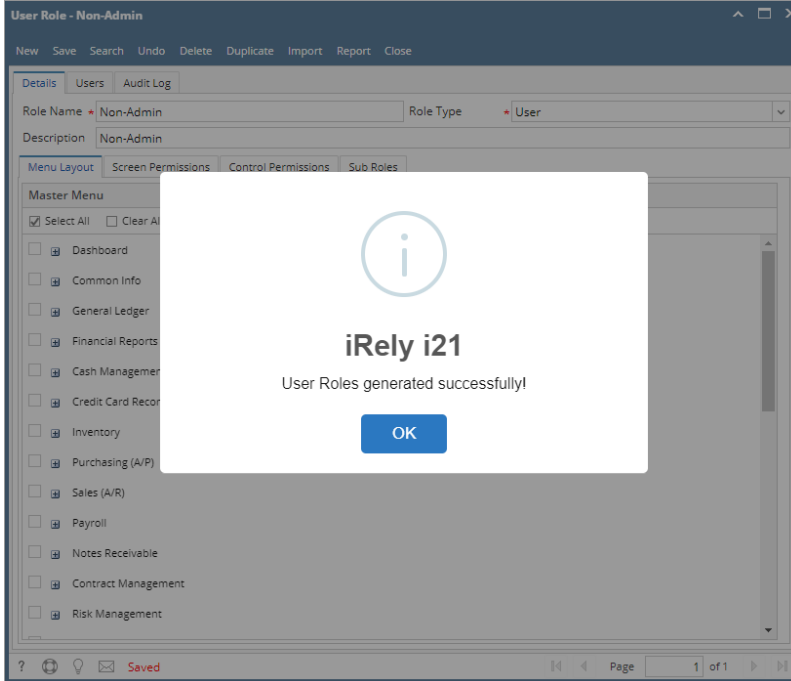
The screenshot shows the 'Create New User Role' dialog box with the 'Details' tab selected. The 'User Role' field contains 'Non-Admin', the 'Description' field contains 'Non-Admin', and the 'Role Type' dropdown menu is open, showing 'User' as the selected option. The dialog box has 'OK' and 'Cancel' buttons at the top left. At the bottom left, there are icons for help, refresh, and a lightbulb, followed by a 'React' button.

- b. To create an **Admin** role, enter **User Role** and **Description** and select **Administrator** on the **Role Type** drop down

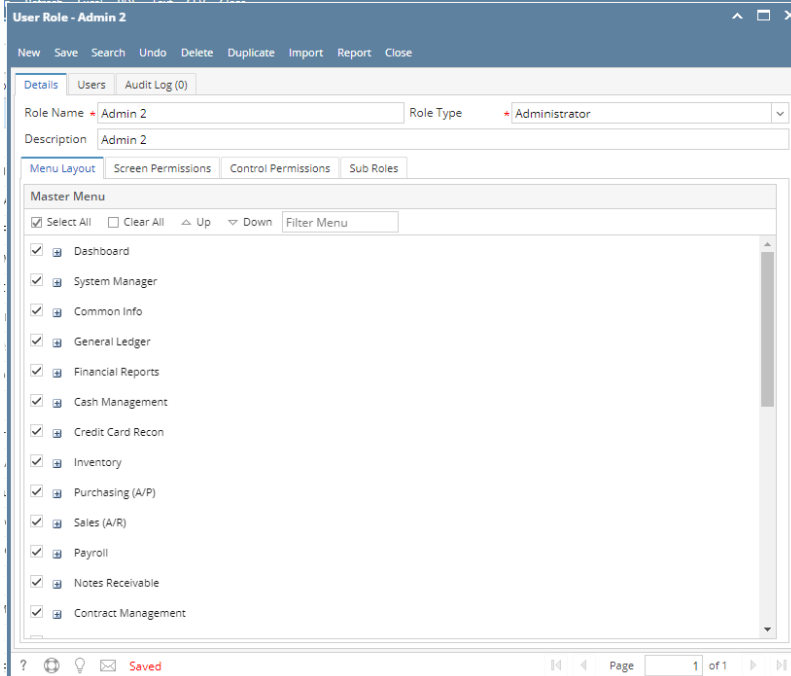


The screenshot shows the 'Create New User Role' dialog box with the 'Details' tab selected. The 'User Role' field contains 'Admin', the 'Description' field contains 'Admin', and the 'Role Type' dropdown menu is open, showing 'Administrator' as the selected option. The dialog box has 'OK' and 'Cancel' buttons at the top left. At the bottom left, there are icons for help, refresh, and a lightbulb, followed by a 'React' button.

4. Click **OK** on **Create New User Role** screen. Click **OK** on the next message box to dismiss

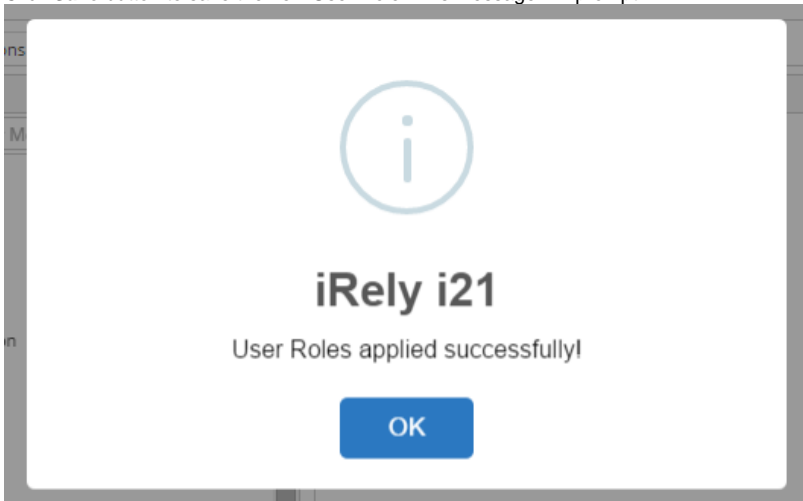


5. For **Admin User Role type**: All menus on the Menu Structure will automatically have a check mark and **System Manager** folder is displayed:



6. For **Non-Admin User Role type**: User should manually select the menus that needs to be applied. When you select/deselect the root folder, all its sub-menus will also be selected/deselected. Note that whatever menu you select on this screen will be accessible to the users with this role.  
**NOTE: Role Name and Description can accept up to 100 characters each.**

7. Click **Save** button to save the new User Role. This message will prompt.



Here are the steps on How to Add different User Role types:

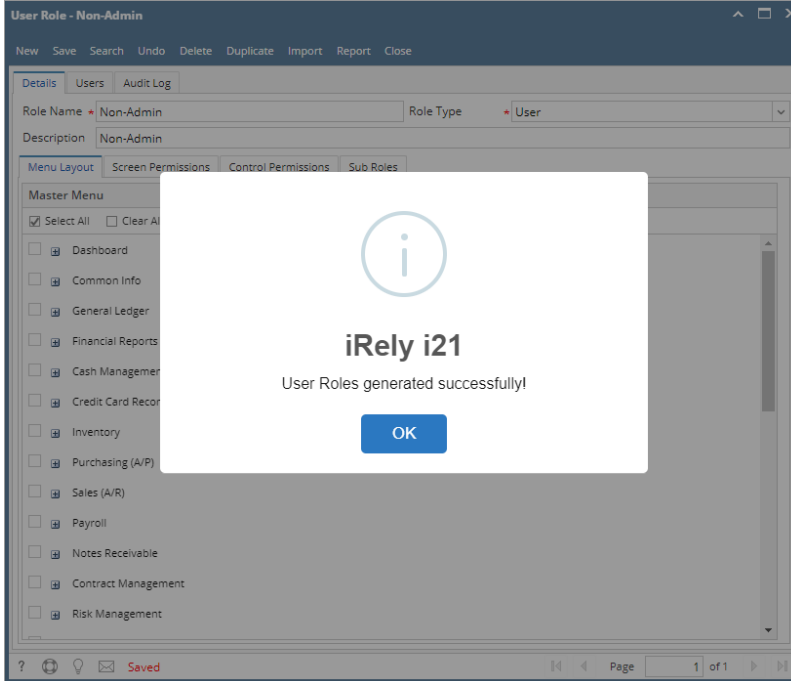
1. Log in as an **Admin user**
2. On user's menu panel, go to **System Manager** folder then click **User Roles**
3. Click the **New** action button to open a new record.
  - a. To create a **Non-admin** role, enter **User Role** and **Description** and select **User** on the **Role Type** drop down

A screenshot of the "Create New User Role" dialog box. The "Details" tab is active. The "User Role" field contains "Non-Admin", the "Description" field contains "Non-Admin", and the "Role Type" dropdown menu is open, showing "User" selected. The dialog box has "OK" and "Cancel" buttons at the top left. At the bottom left, there are icons for help, refresh, and a lightbulb, followed by a "Reactions" button.

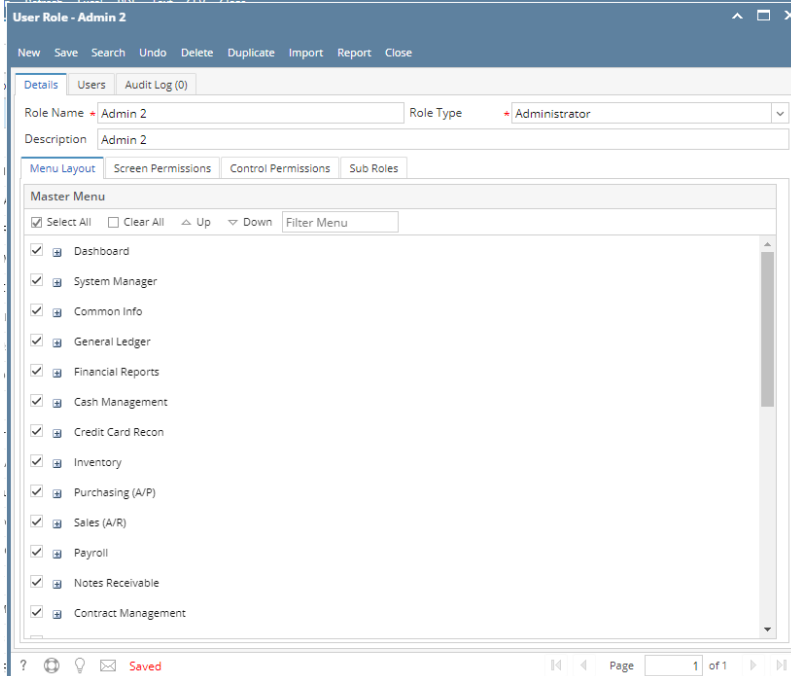
- b. To create an **Admin** role, enter **User Role** and **Description** and select **Administrator** on the **Role Type** drop down

A screenshot of the "Create New User Role" dialog box. The "Details" tab is active. The "User Role" field contains "Admin", the "Description" field contains "Admin", and the "Role Type" dropdown menu is open, showing "Administrator" selected. The dialog box has "OK" and "Cancel" buttons at the top left. At the bottom left, there are icons for help, refresh, and a lightbulb, followed by a "Reactions" button.

4. Click **OK** on **Create New User Role** screen. Click **OK** on the next message box to dismiss

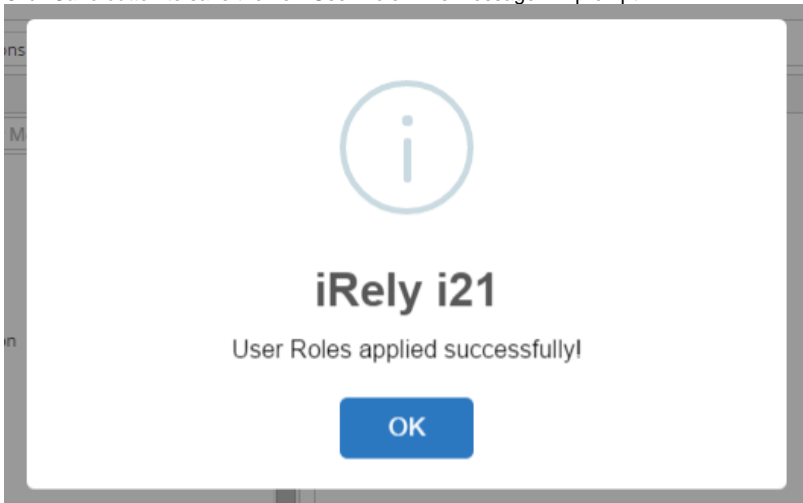


5. For **Admin User Role type**: All menus on the Menu Structure will automatically have a check mark and **System Manager** folder is displayed:



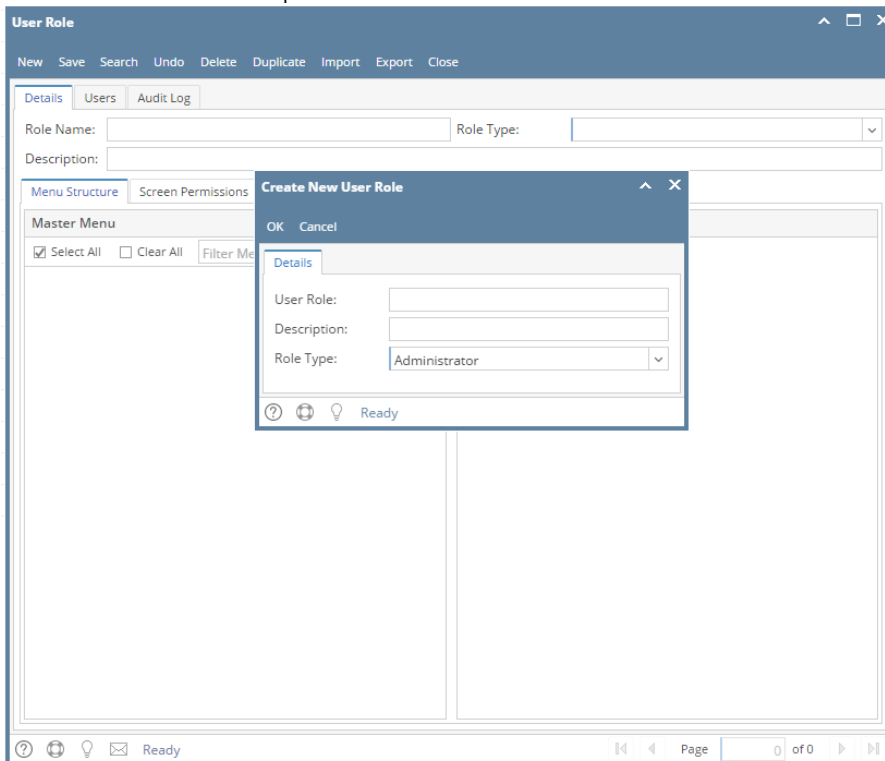
6. For **Non-Admin User Role type**: User should manually select the menus that needs to be applied. When you select/deselect the root folder, all its sub-menus will also be selected/deselected. Note that whatever menu you select on this screen will be accessible to the users with this role.  
**NOTE: Role Name and Description can accept up to 50 characters each.**

7. Click **Save** button to save the new User Role. This message will prompt.

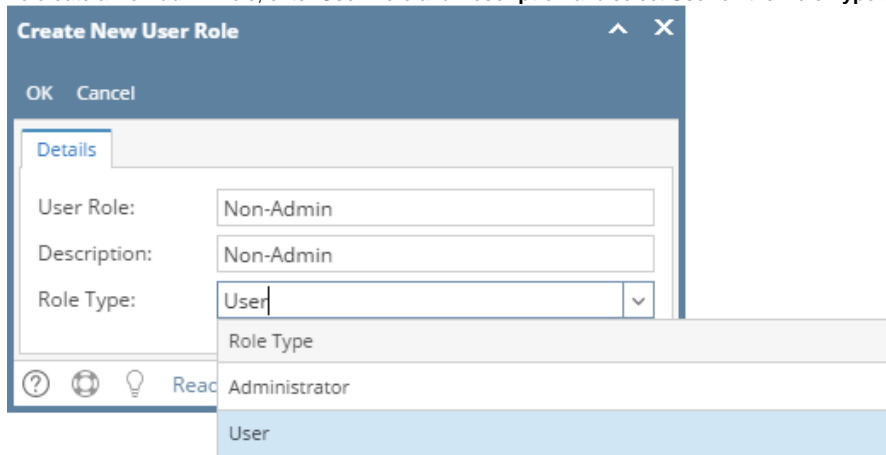


Here are the steps on How to Add different User Role types:

1. Log in as an **Admin user**
2. On user's menu panel, go to **System Manager** folder then click **User Roles**
3. Click the **New** action button to open a new record.



- a. To create a **Non-admin** role, enter **User Role** and **Description** and select **User** on the **Role Type** drop down



**Create New User Role**

OK Cancel

Details

User Role: Non-Admin

Description: Non-Admin

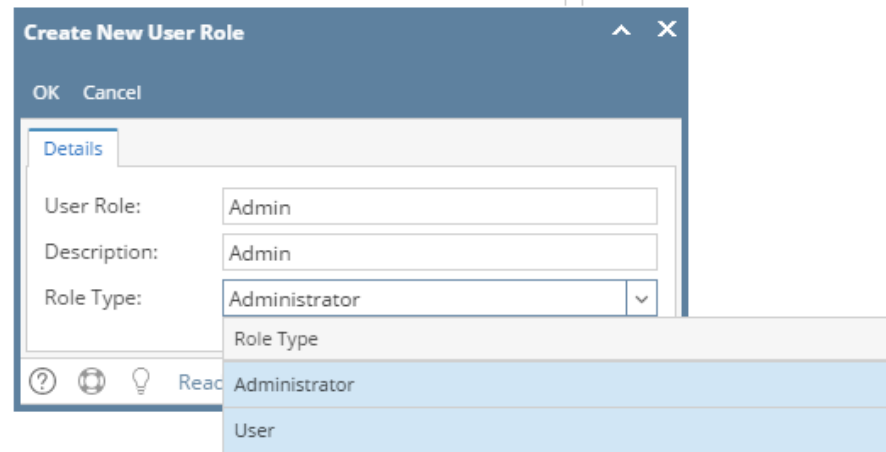
Role Type: User

Role Type

Administrator

User

- b. To create an **Admin** role, enter **User Role** and **Description** and select **Administrator** on the **Role Type** drop down



**Create New User Role**

OK Cancel

Details

User Role: Admin

Description: Admin

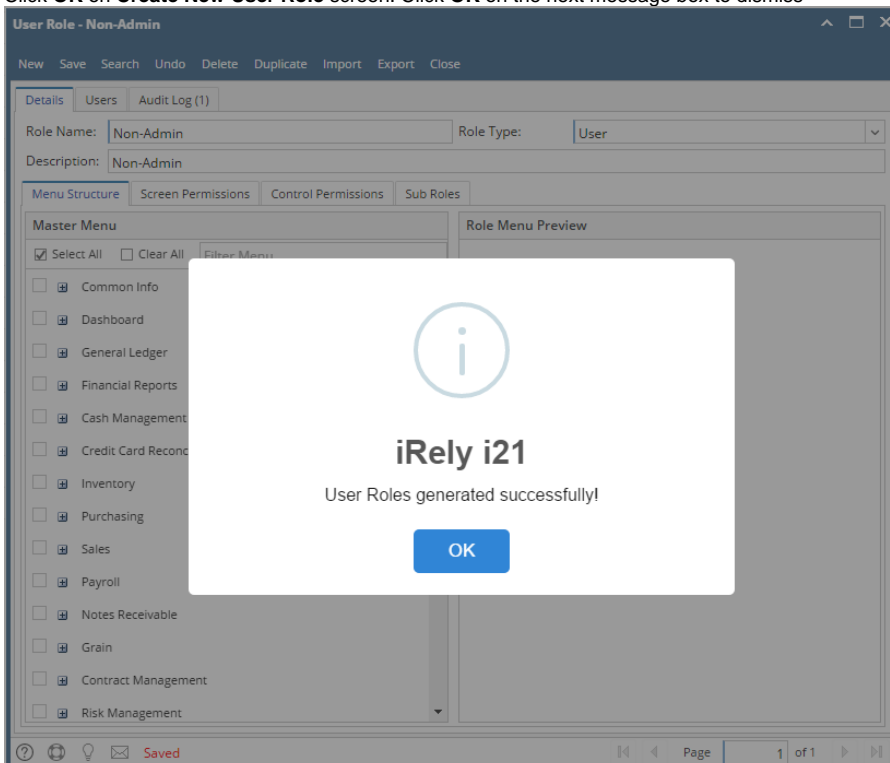
Role Type: Administrator

Role Type

Administrator

User

4. Click **OK** on **Create New User Role** screen. Click **OK** on the next message box to dismiss



**User Role - Non-Admin**

New Save Search Undo Delete Duplicate Import Export Close

Details Users Audit Log (1)

Role Name: Non-Admin Role Type: User

Description: Non-Admin

Menu Structure Screen Permissions Control Permissions Sub Roles

Master Menu

Select All Clear All Filter Menu

Common Info

Dashboard

General Ledger

Financial Reports

Cash Management

Credit Card Reconc

Inventory

Purchasing

Sales

Payroll

Notes Receivable

Grain

Contract Management

Risk Management

Role Menu Preview

iRely i21

User Roles generated successfully!

OK

Page 1 of 1

5. For Admin User Role type: All menus on the Menu Structure will automatically have a check mark and **System Manager** folder is displayed:

**User Role - ADMIN**

Role Name: ADMIN Role Type: Administrator

Description: Do not use in Production. For Demo Purposes Only.

**Menu Structure** | Screen Permissions | Control Permissions | Sub Roles

**Master Menu**

☒ Select All ☐ Clear All Filter Menu

- ☒ System Manager
- ☒ Common Info
- ☒ Dashboard
- ☒ General Ledger
- ☒ Financial Reports
- ☒ Cash Management
- ☒ Credit Card Reconciliation
- ☒ Inventory
- ☒ Purchasing
- ☒ Sales
- ☒ Payroll
- ☒ Notes Receivable
- ☒ Grain
- ☒ Contract Management

**Role Menu Preview**

- System Manager
  - Common Info
  - Dashboard
  - General Ledger
  - Financial Reports
  - Cash Management
  - Credit Card Reconciliation
  - Inventory
  - Purchasing
  - Sales
  - Payroll
  - Notes Receivable
  - Grain
  - Contract Management
  - Risk Management

6. For Non-Admin User Role type: User should manually select the menus that needs to be applied. When you select/deselect the root folder, all its sub-menus will also be selected/deselected. Note that whatever menu you select on this screen will be accessible to the users with this role.

**User Role - Non-Admin**

Role Name: Non-Admin Role Type: User

Description: Non-Admin

**Menu Structure** | Screen Permissions | Control Permissions | Sub Roles

**Master Menu**

☒ Select All ☐ Clear All Filter Menu

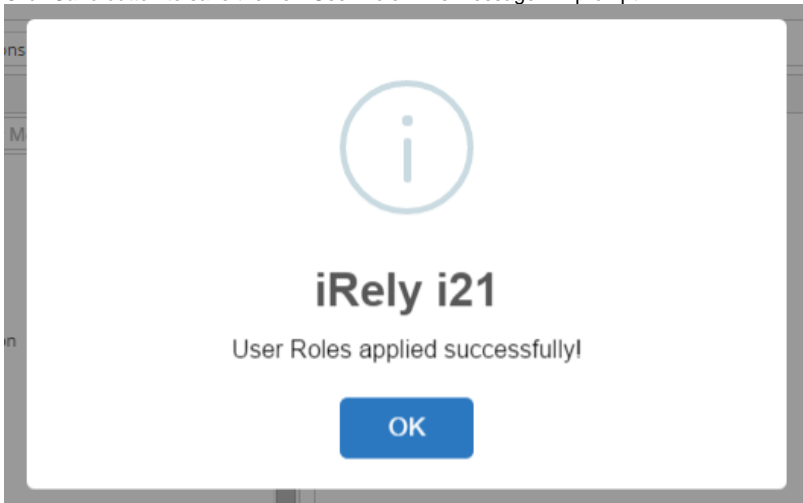
- ☒ Common Info
- ☒ Dashboard
- ☒ General Ledger
- ☒ Financial Reports
- ☒ Cash Management
- ☐ Credit Card Reconciliation
- ☒ Inventory
- ☒ Purchasing
- ☒ Sales
- ☐ Payroll
- ☐ Notes Receivable
- ☐ Grain
- ☐ Contract Management
- ☐ Risk Management

**Role Menu Preview**

- Common Info
  - Dashboard
  - General Ledger
  - Financial Reports
  - Cash Management
  - Inventory
  - Purchasing
  - Sales

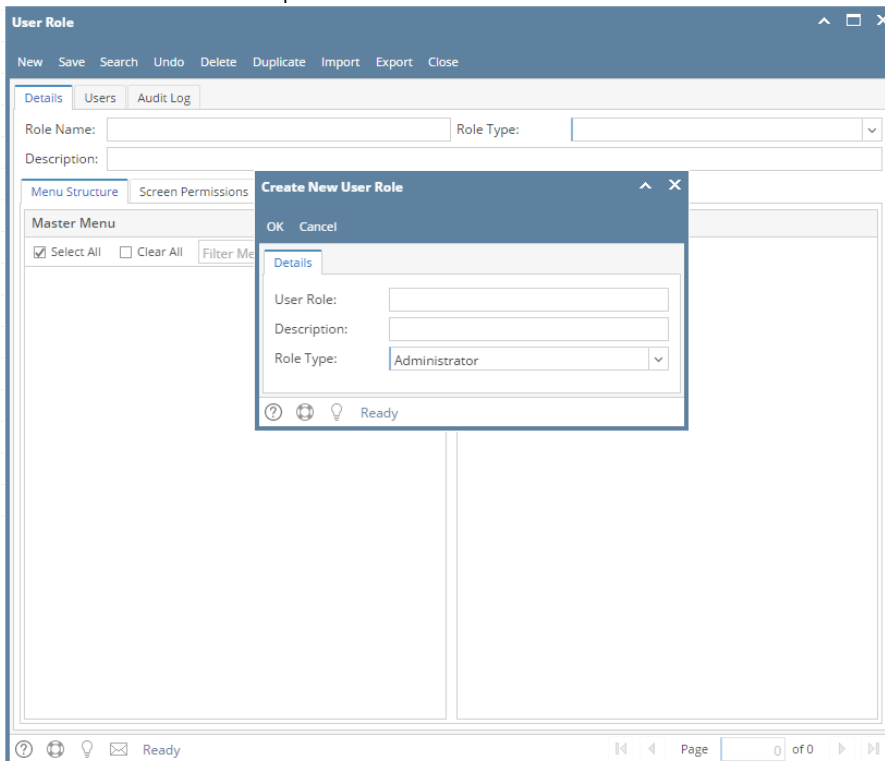
NOTE: **Role Name** and **Description** can accept up to 50 characters each.

7. Click **Save** button to save the new User Role. This message will prompt.



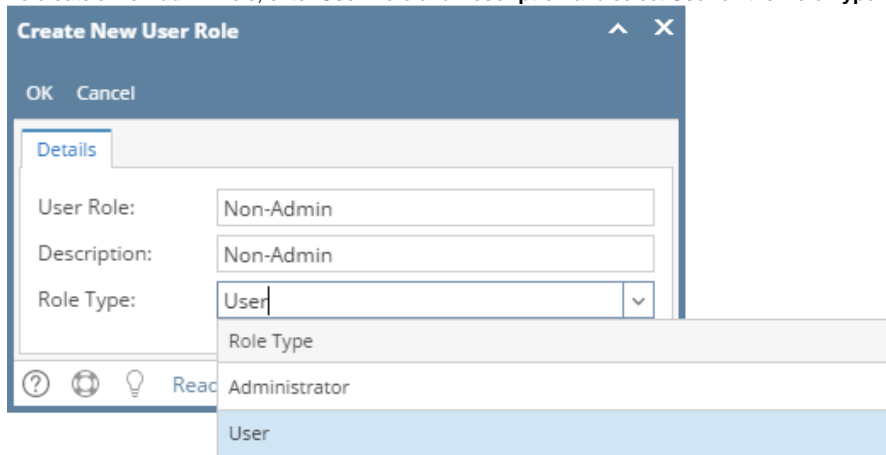
Here are the steps on How to Add different User Role types:

1. Log in as an **Admin user**
2. On user's menu panel, go to **System Manager** folder then click **User Roles**
3. Click the **New** action button to open a new record.





- a. To create a **Non-admin** role, enter **User Role** and **Description** and select **User** on the **Role Type** drop down



**Create New User Role**

OK Cancel

**Details**

User Role: Non-Admin

Description: Non-Admin

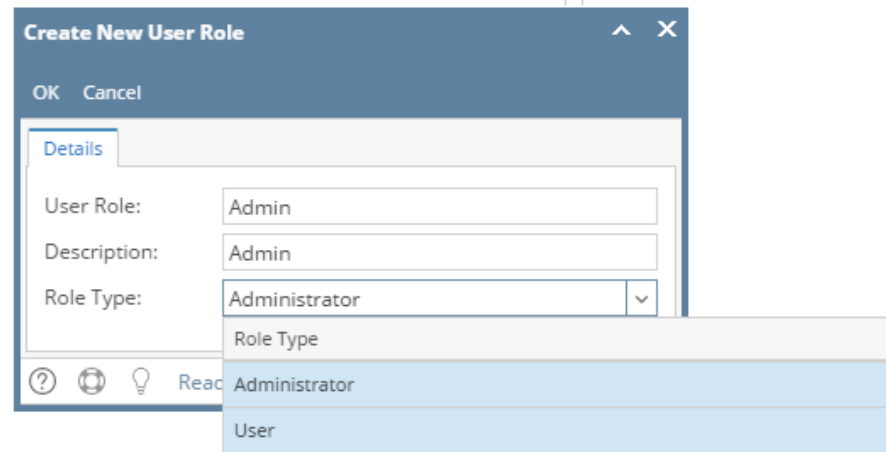
Role Type: User

Role Type

Administrator

User

- b. To create an **Admin** role, enter **User Role** and **Description** and select **Administrator** on the **Role Type** drop down



**Create New User Role**

OK Cancel

**Details**

User Role: Admin

Description: Admin

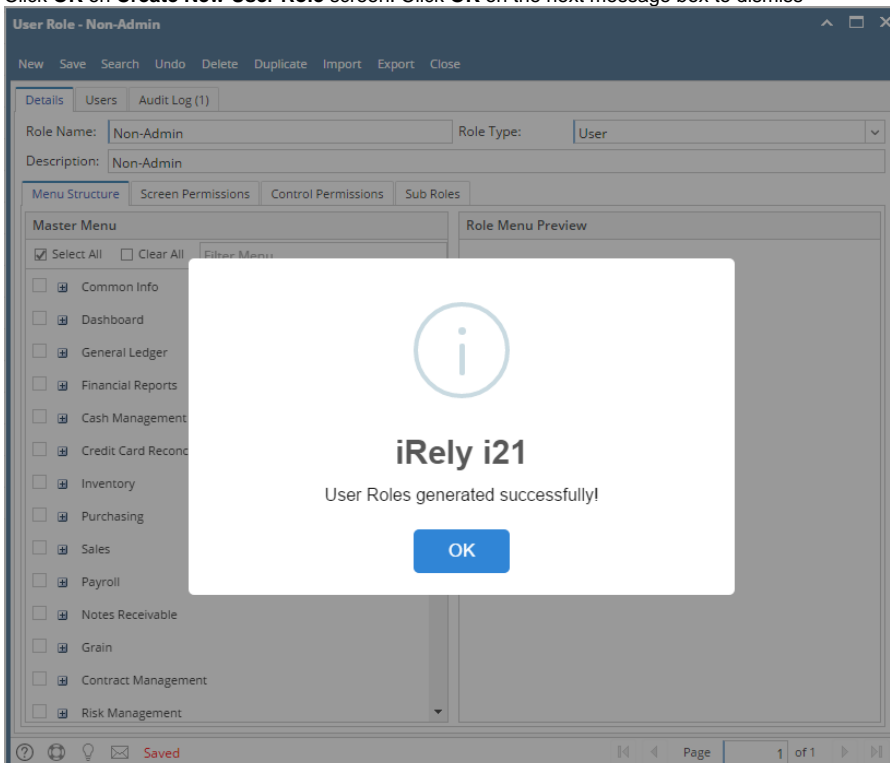
Role Type: Administrator

Role Type

Administrator

User

4. Click **OK** on **Create New User Role** screen. Click **OK** on the next message box to dismiss



**User Role - Non-Admin**

New Save Search Undo Delete Duplicate Import Export Close

**Details** Users Audit Log (1)

Role Name: Non-Admin Role Type: User

Description: Non-Admin

**Menu Structure** Screen Permissions Control Permissions Sub Roles

**Master Menu**

☒ Select All ☐ Clear All Filter Menu

☐ Common Info

☐ Dashboard

☐ General Ledger

☐ Financial Reports

☐ Cash Management

☐ Credit Card Reconc

☐ Inventory

☐ Purchasing

☐ Sales

☐ Payroll

☐ Notes Receivable

☐ Grain

☐ Contract Management

☐ Risk Management

**Role Menu Preview**

**iRely i21**

User Roles generated successfully!

OK

Page 1 of 1

5. For Admin User Role type: All menus on the Menu Structure will automatically have a check mark and **System Manager** folder is displayed:

**User Role - ADMIN**

Role Name: ADMIN Role Type: Administrator

Description: Do not use in Production. For Demo Purposes Only.

**Menu Structure** | Screen Permissions | Control Permissions | Sub Roles

**Master Menu**

☒ Select All ☐ Clear All Filter Menu

- ☒ System Manager
- ☒ Common Info
- ☒ Dashboard
- ☒ General Ledger
- ☒ Financial Reports
- ☒ Cash Management
- ☒ Credit Card Reconciliation
- ☒ Inventory
- ☒ Purchasing
- ☒ Sales
- ☒ Payroll
- ☒ Notes Receivable
- ☒ Grain
- ☒ Contract Management

**Role Menu Preview**

- System Manager
  - Common Info
  - Dashboard
  - General Ledger
  - Financial Reports
  - Cash Management
  - Credit Card Reconciliation
  - Inventory
  - Purchasing
  - Sales
  - Payroll
  - Notes Receivable
  - Grain
  - Contract Management
  - Risk Management

Ready Page 1 of 1

6. For Non-Admin User Role type: User should manually select the menus that needs to be applied. When you select/deselect the root folder, all its sub-menus will also be selected/deselected. Note that whatever menu you select on this screen will be accessible to the users with this role.

**User Role - Non-Admin**

Role Name: Non-Admin Role Type: User

Description: Non-Admin

**Menu Structure** | Screen Permissions | Control Permissions | Sub Roles

**Master Menu**

☒ Select All ☐ Clear All Filter Menu

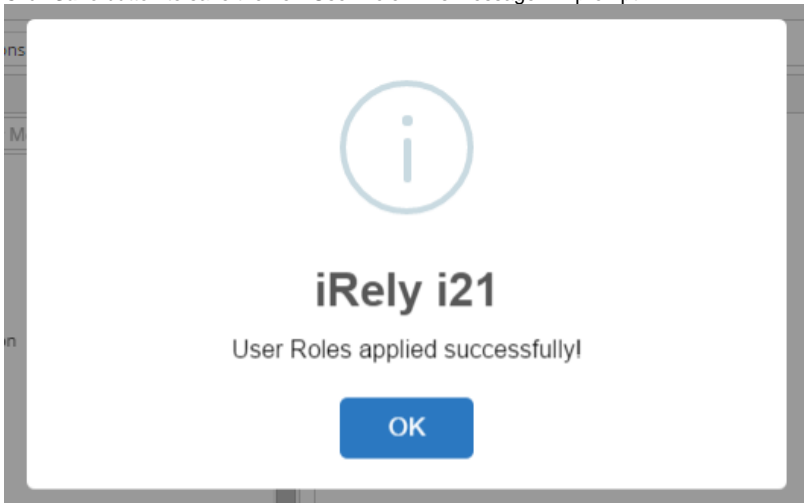
- ☒ Common Info
- ☒ Dashboard
- ☒ General Ledger
- ☒ Financial Reports
- ☒ Cash Management
- ☐ Credit Card Reconciliation
- ☒ Inventory
- ☒ Purchasing
- ☒ Sales
- ☐ Payroll
- ☐ Notes Receivable
- ☐ Grain
- ☐ Contract Management
- ☐ Risk Management

**Role Menu Preview**

- Common Info
  - Dashboard
  - General Ledger
  - Financial Reports
  - Cash Management
  - Inventory
  - Purchasing
  - Sales

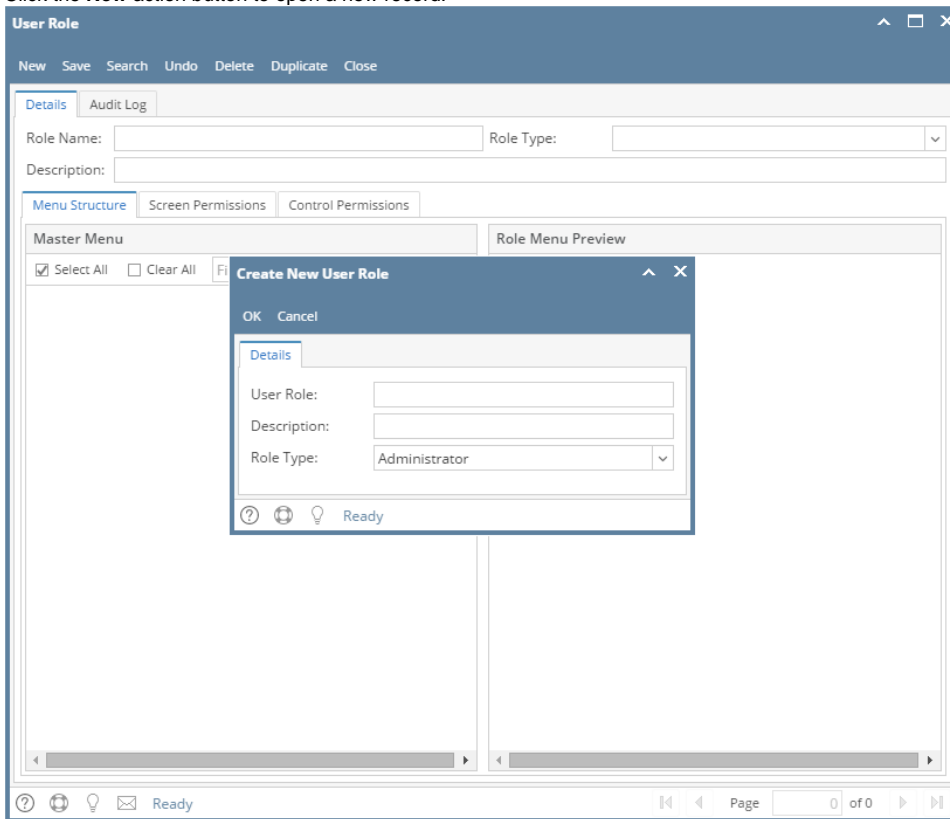
Edited Page 1 of 1

7. Click **Save** button to save the new User Role. This message will prompt.

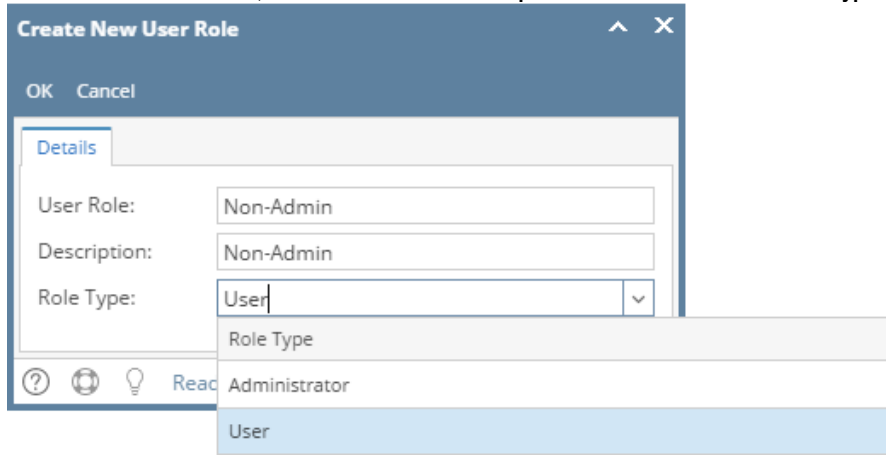


Here are the steps on How to Add different User Role types:

1. Log in as an **Admin user**
2. On user's menu panel, go to **System Manager** folder then click **User Roles**
3. Click the **New** action button to open a new record.



- a. To create a **Non-admin** role, enter **User Role** and **Description** and select **User** on the **Role Type** drop down



**Create New User Role**

OK Cancel

Details

User Role: Non-Admin

Description: Non-Admin

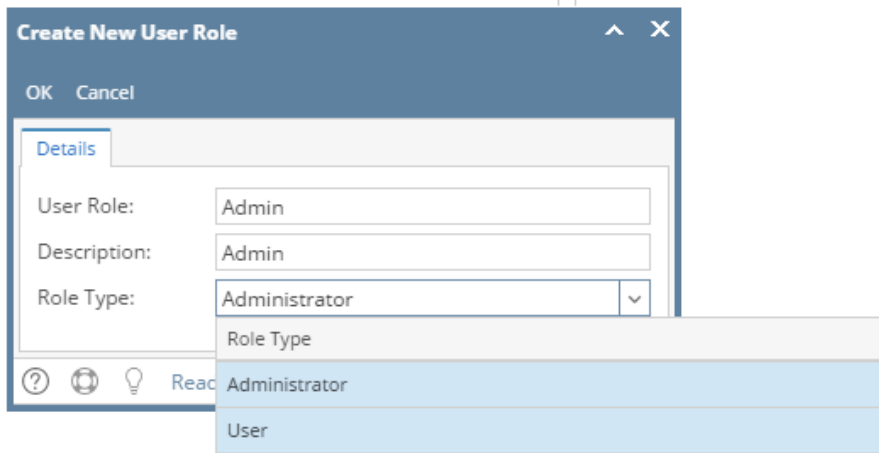
Role Type: User

Role Type

Administrator

User

- b. To create an **Admin** role, enter **User Role** and **Description** and select **Administrator** on the **Role Type** drop down



**Create New User Role**

OK Cancel

Details

User Role: Admin

Description: Admin

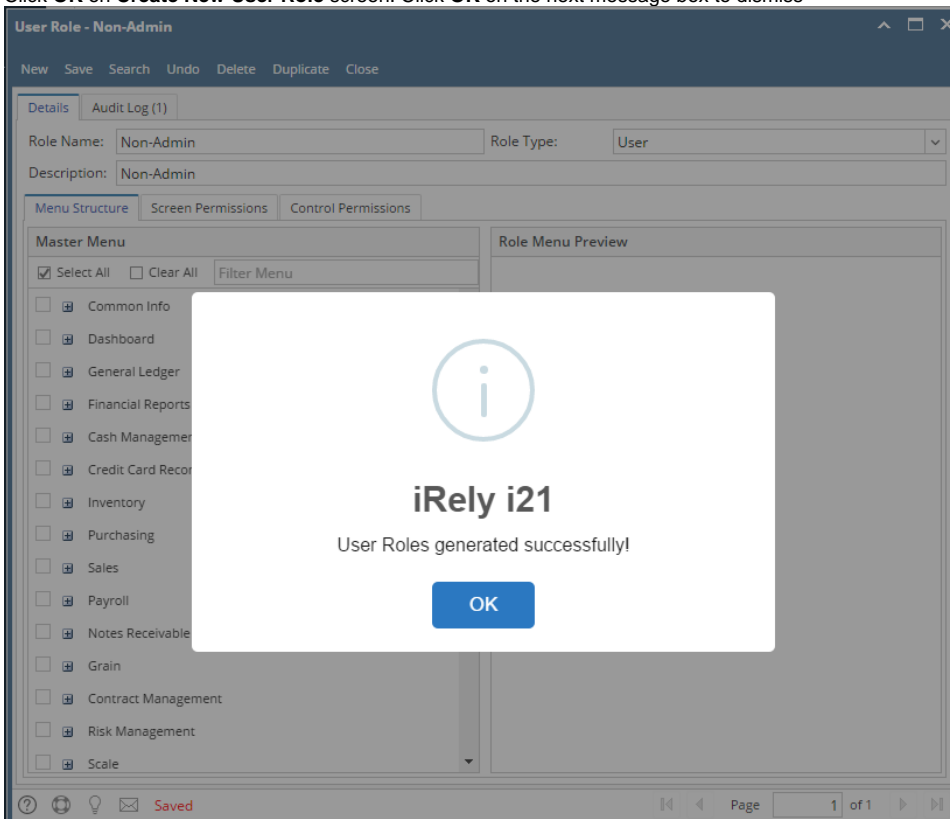
Role Type: Administrator

Role Type

Administrator

User

4. Click **OK** on **Create New User Role** screen. Click **OK** on the next message box to dismiss



**User Role - Non-Admin**

New Save Search Undo Delete Duplicate Close

Details Audit Log (1)

Role Name: Non-Admin Role Type: User

Description: Non-Admin

Menu Structure Screen Permissions Control Permissions

Master Menu

☒ Select All ☐ Clear All Filter Menu

☐ Common Info

☐ Dashboard

☐ General Ledger

☐ Financial Reports

☐ Cash Management

☐ Credit Card Record

☐ Inventory

☐ Purchasing

☐ Sales

☐ Payroll

☐ Notes Receivable

☐ Grain

☐ Contract Management

☐ Risk Management

☐ Scale

Role Menu Preview

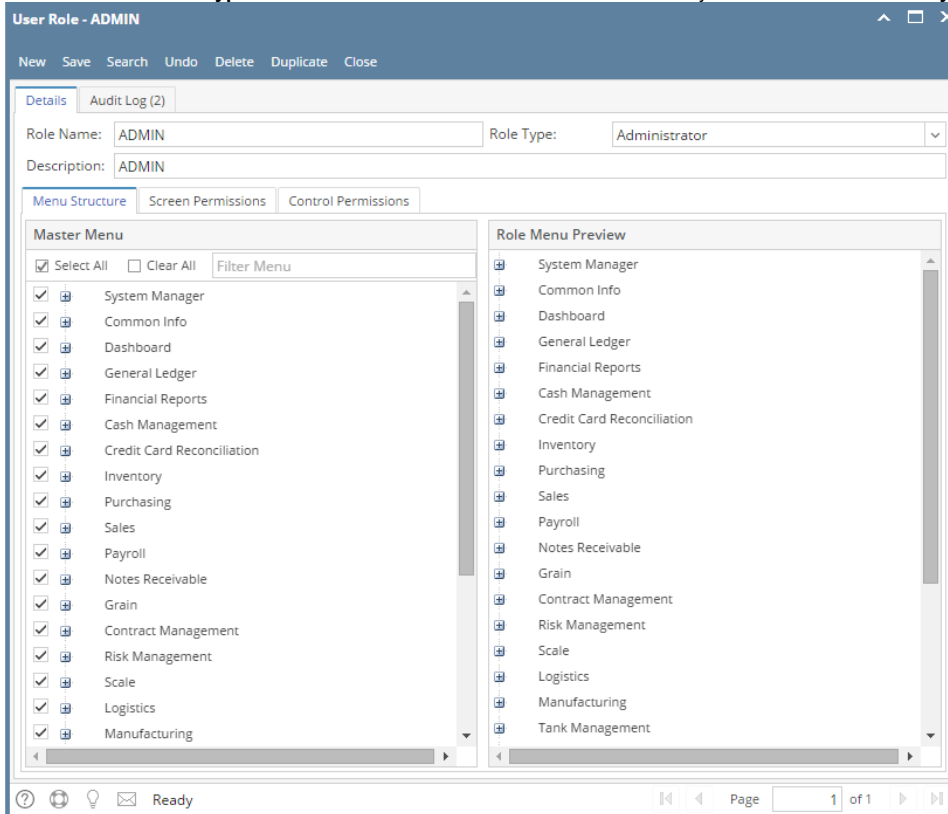
**iRely i21**

User Roles generated successfully!

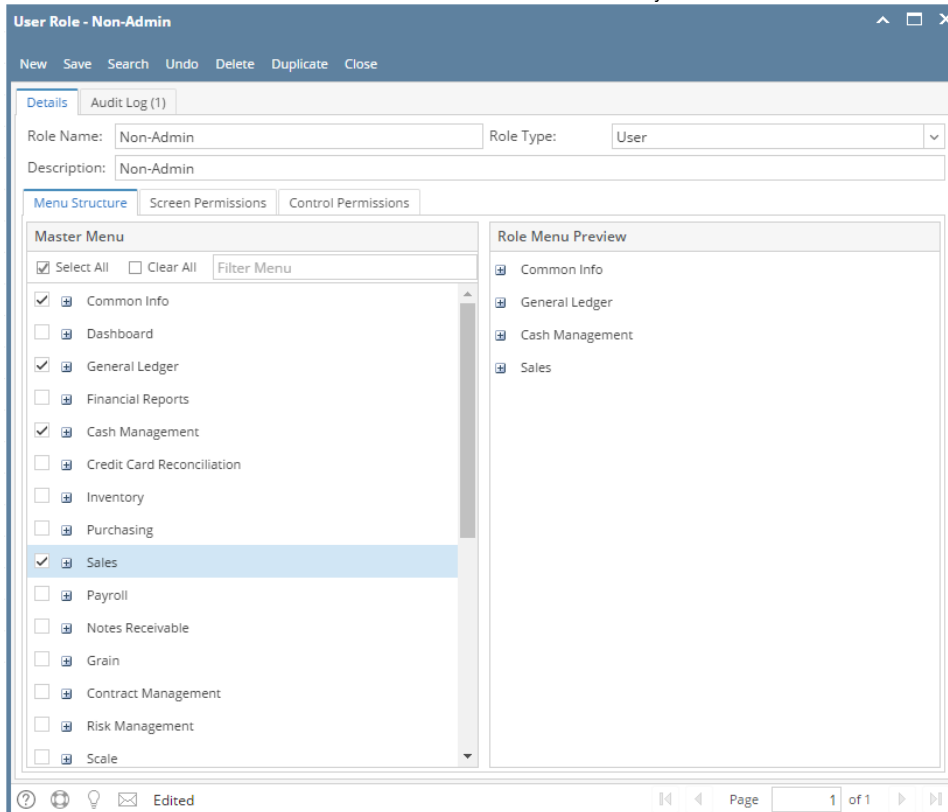
OK

Page 1 of 1

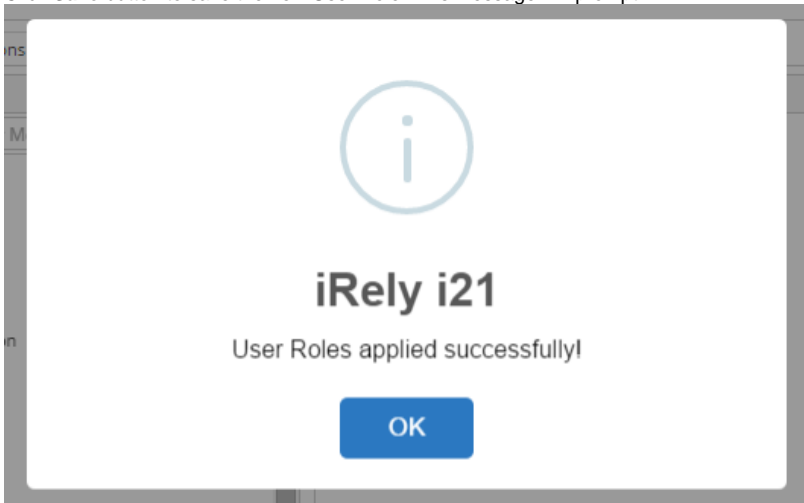
5. For Admin User Role type: All menus on the Menu Structure will automatically have a check mark and **System Manager** folder is displayed:



6. For Non-Admin User Role type: User should manually select the menus that needs to be applied. When you select/deselect the root folder, all its sub-menus will also be selected/deselected. Note that whatever menu you select on this screen will be accessible to the users with this role.

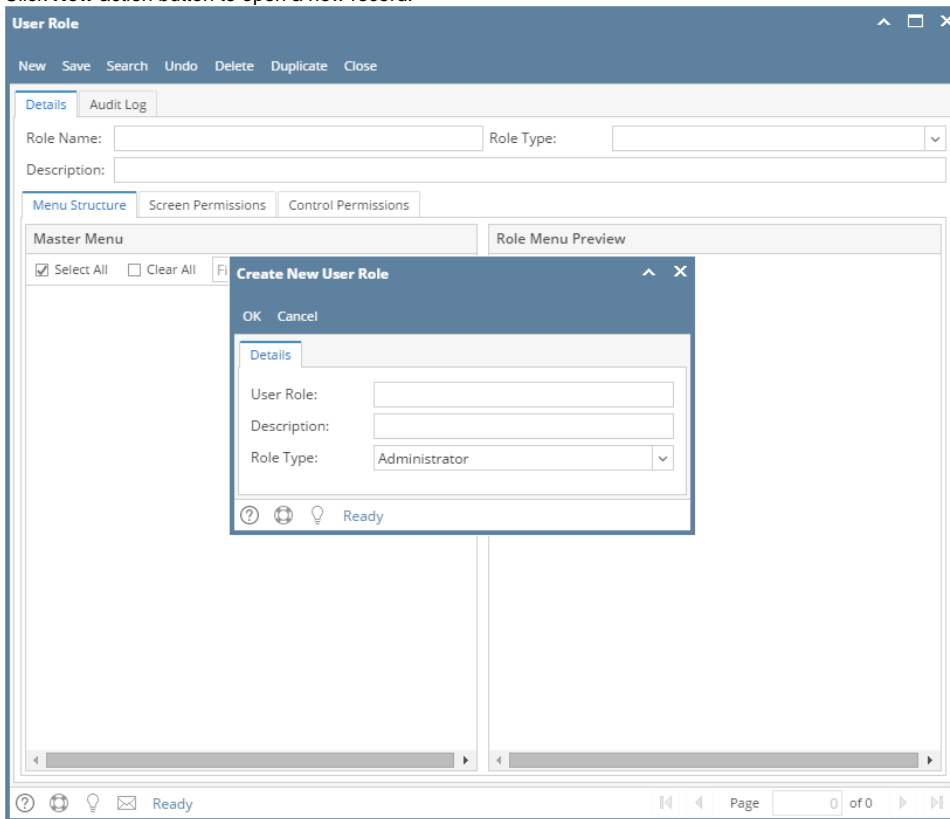


7. Click **Save** button to save the new User Role. This message will prompt.



Here are the steps on How to Add different User Role types:

1. Log in as **Admin user**
2. On user's menu panel, go to **System Manager** folder then click **User Roles**
3. Click **New** action button to open a new record.



- a. To create a **Non-admin** role, enter **User Role** and **Description** and select **User** on the **Role Type** drop down

**Create New User Role**

OK Cancel

**Details**

User Role: Non-Admin

Description: Non-Admin

Role Type: User

Role Type

Administrator

User

Contact

- b. To create an **Admin** role, enter **User Role** and **Description** and select **Administrator** on the **Role Type** drop down

**Create New User Role**

OK Cancel

**Details**

User Role: Admin

Description: Admin

Role Type: Administrator

Role Type

Administrator

User

Contact

- c. To create a **Contact** role, enter **User Role** and **Description** and select **Contact** on the **Role Type** drop down

**Create New User Role**

OK Cancel

**Details**

User Role: Contact

Description: Contact

Role Type: Contact

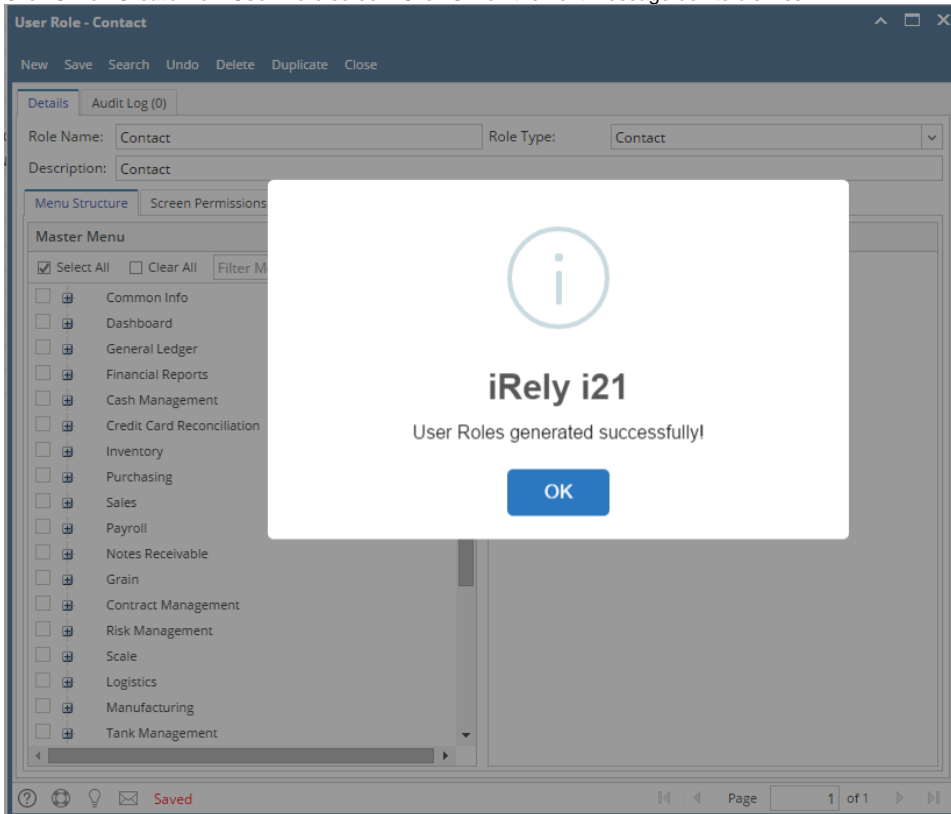
Role Type

Administrator

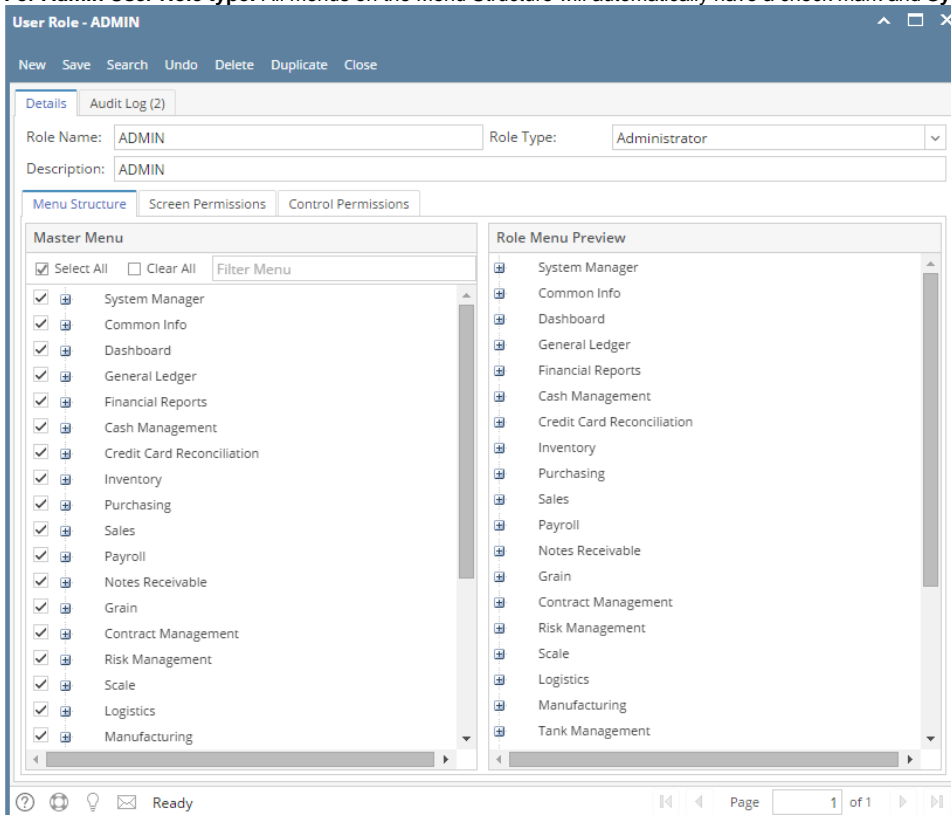
User

Contact

4. Click **OK** on **Create New User Role** screen. Click **OK** on the next message box to dismiss



5. For **Admin User Role type**: All menus on the Menu Structure will automatically have a check mark and **System Manager** folder is displayed:

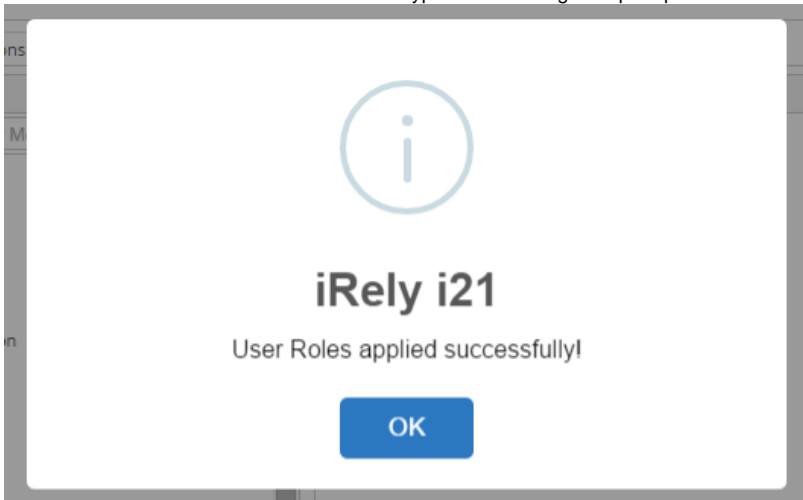




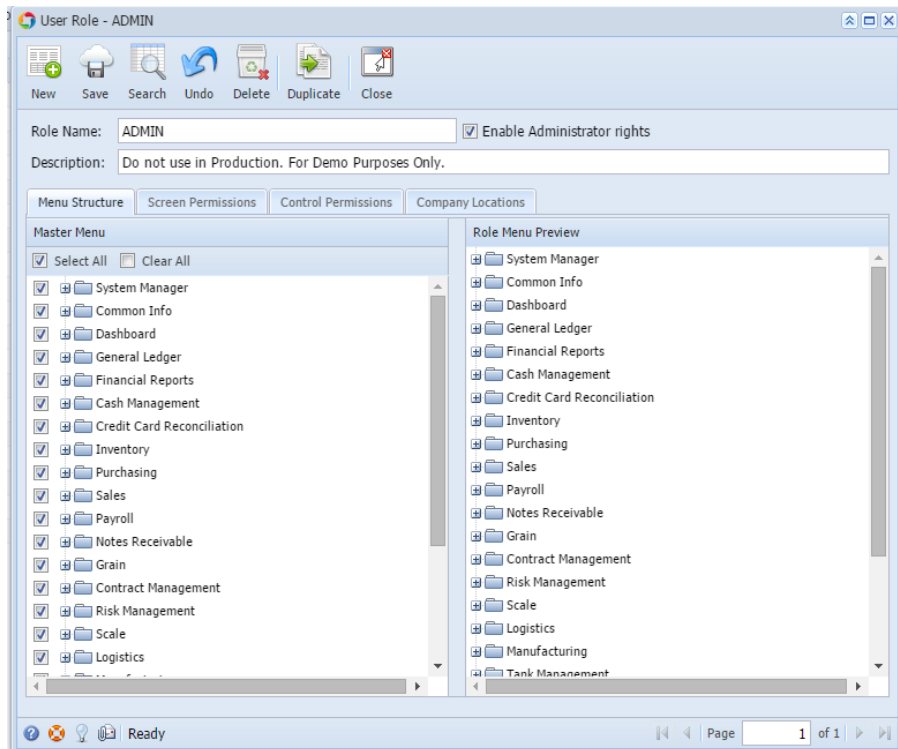
6. **For Non-Admin and Contact User Role type:** User should manually select the menus that needs to be applied. When you select/deselect the root folder, all its sub-menus will also be selected/deselected. Note that whatever menu you select on this screen will be accessible to the users with this role.

The screenshot shows the 'User Role - Contact' configuration window. The 'Menu Structure' tab is active, displaying a list of menu items under 'Master Menu'. The 'Sales' menu item is selected. The 'Role Menu Preview' on the right shows the selected menu items: 'Common Info', 'Dashboard', 'General Ledger', 'Purchasing', and 'Sales'. The bottom status bar indicates 'Edited' and 'Page 1 of 1'.

7. Click **Save** button to save the new User Role type. This message will prompt.

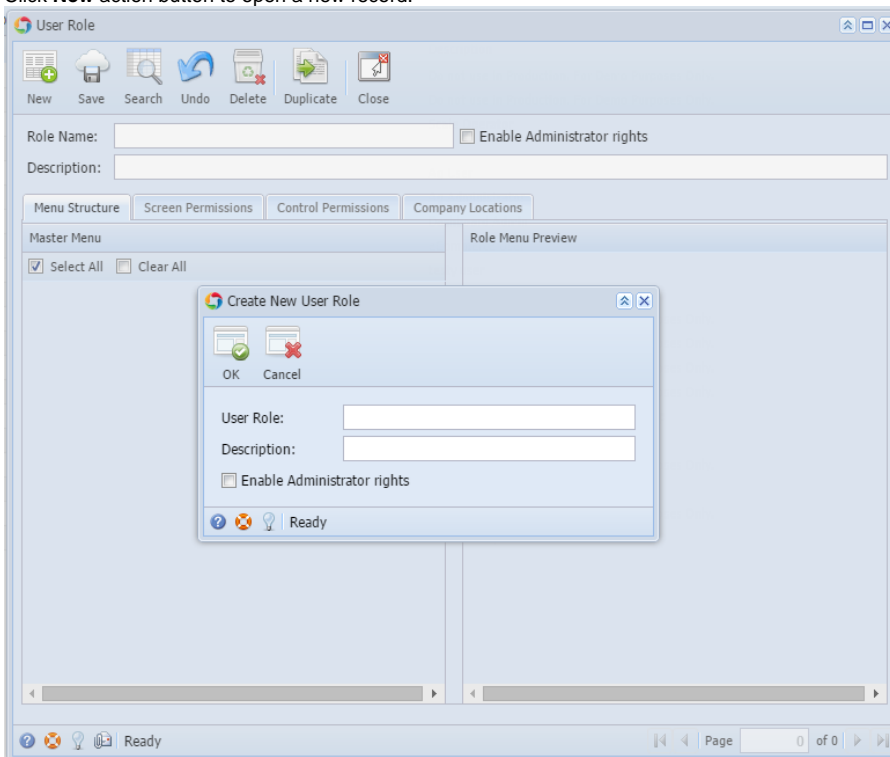


Only **Admin** type users are allowed to have access to this screen. They have the ability to control and assign what permissions will be given to all the other users on each of the menus within the system.

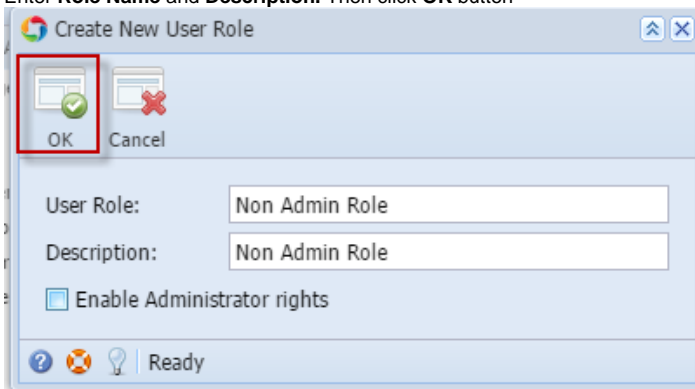


Here are the steps on How to Add a Non-Admin User Role Type:

1. Log in as **Admin user**
2. On user's menu panel, go to **System Manager** folder then click **User Roles**
3. Click **New** action button to open a new record.



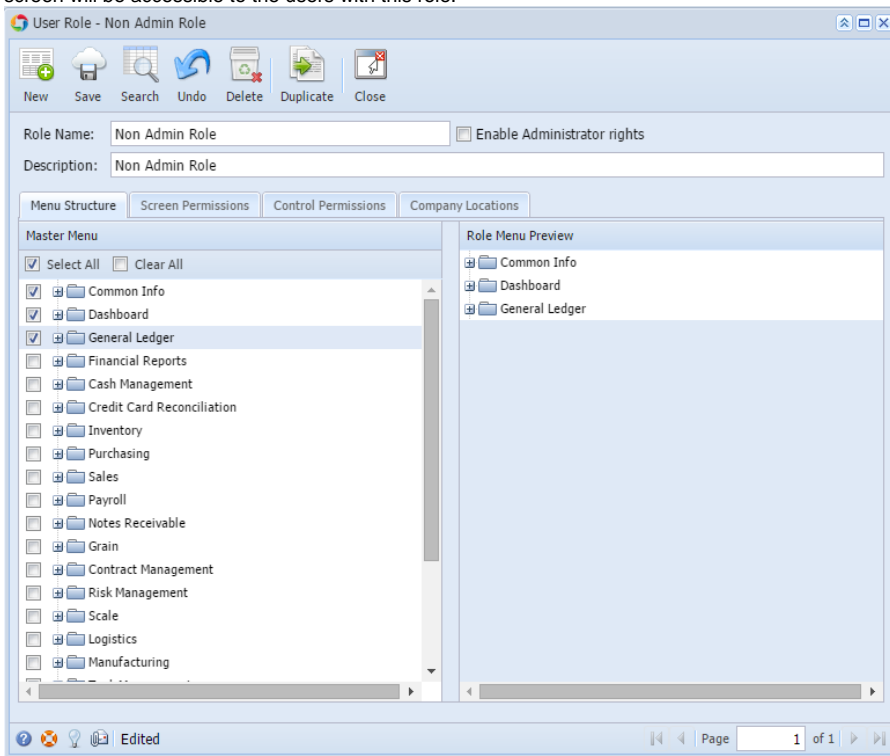
4. Enter **Role Name** and **Description**. Then click **OK** button



Notification will appear



5. Select the menus. When you deselect the root folder, all its sub-menus will also be deselected. Note that whatever menu you select on this screen will be accessible to the users with this role.

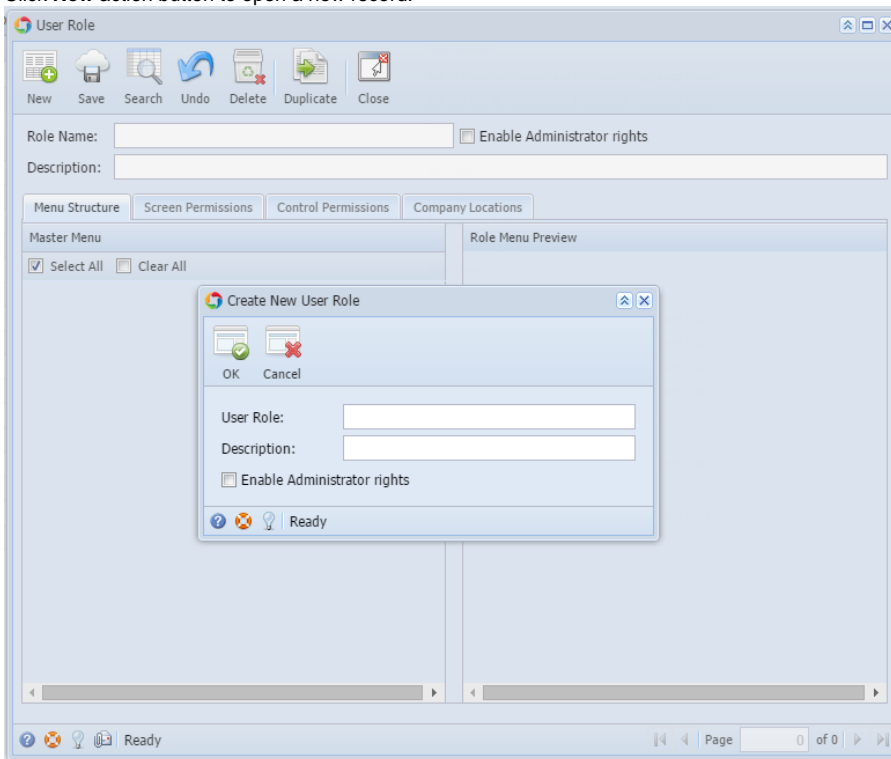


6. Click **Save** button to save the new User Role type. This message will prompt.

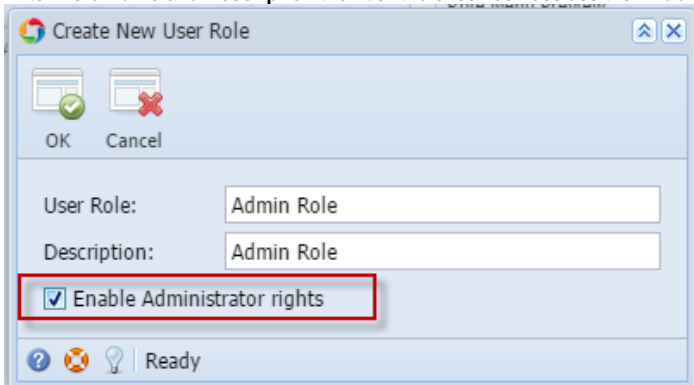


**Here are the steps on How to Add an Admin User Role Type:**

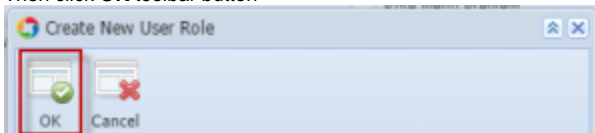
1. Log in as **Admin user**
2. On user's menu panel, go to **System Manager** folder then click **User Roles**
3. Click **New** action button to open a new record.



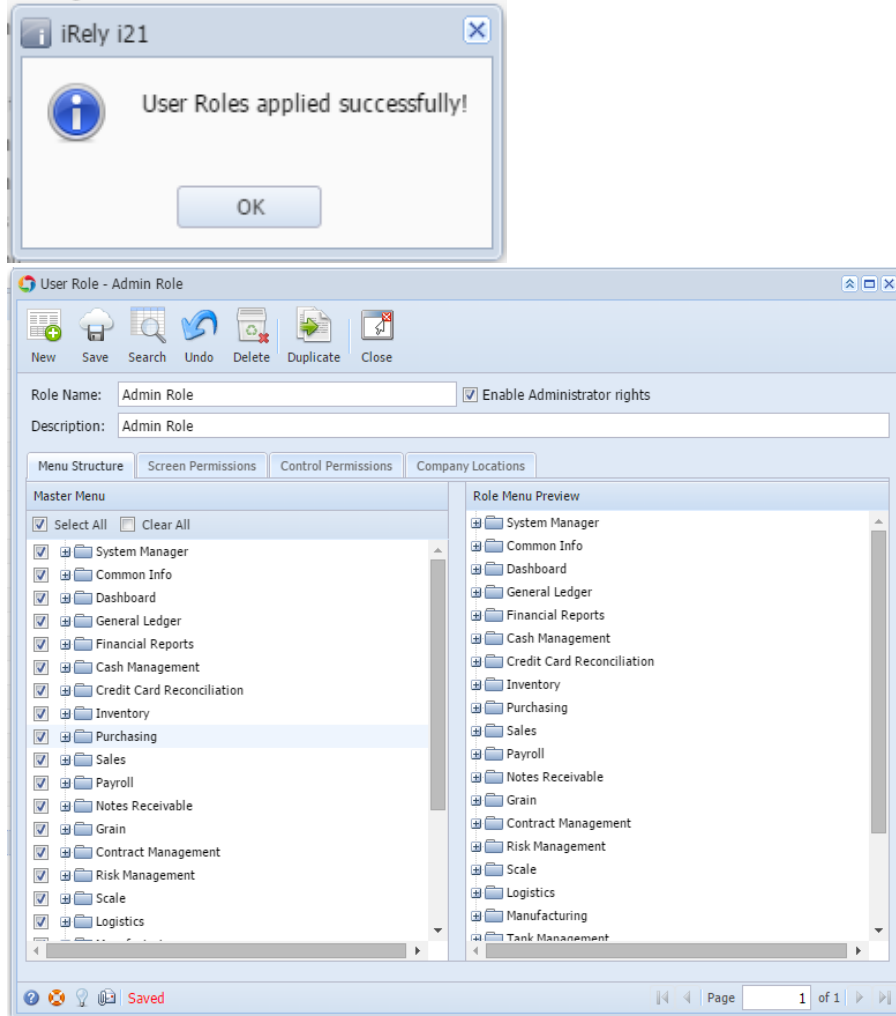
4. Enter **Role Name** and **Description** then tick the check box besides the **Enable Administrator rights**.



5. Then click **OK** toolbar button



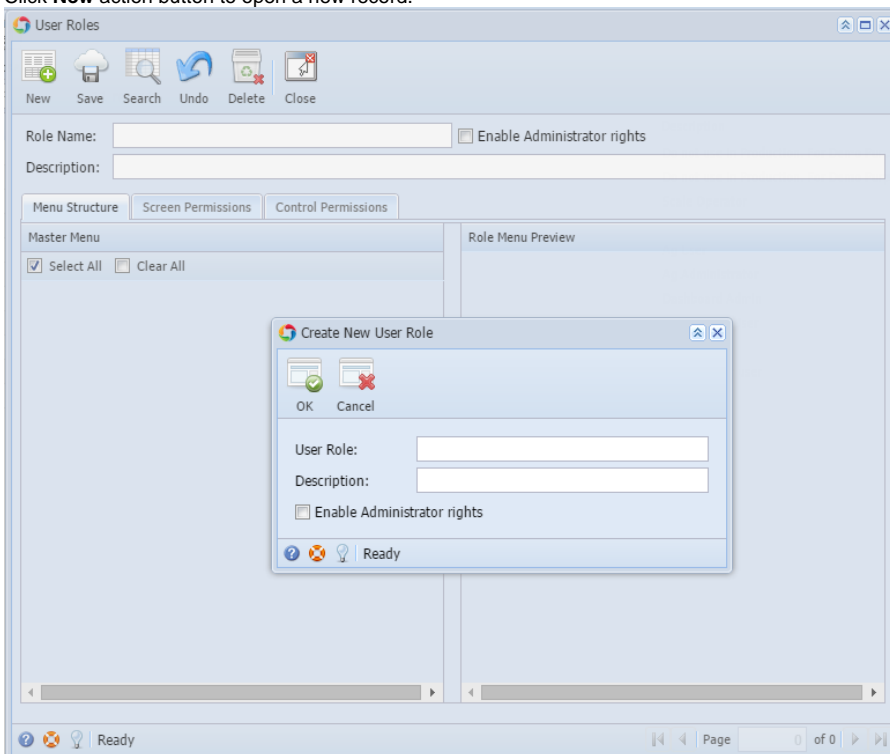
After the menus are generated successfully, all menus on the Menu Structure will have a check mark and System Manager folder is displayed



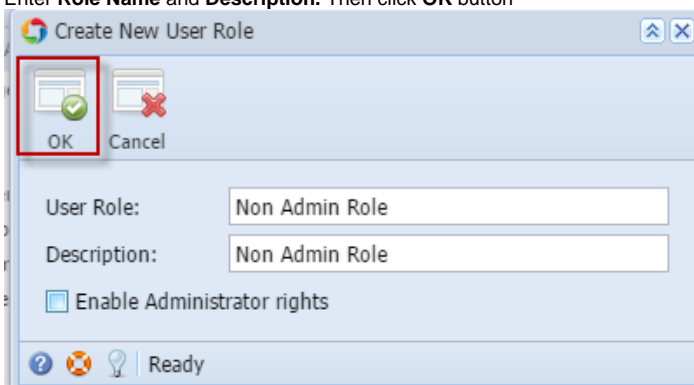
Here are the steps on How to Add a Non-Admin User Role Type:

1. Log in as **Admin user**
2. On user's menu panel, go to **System Manager** folder then click **User Roles**

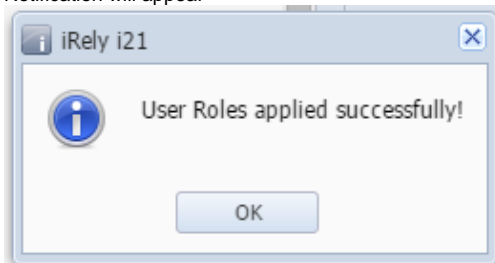
3. Click **New** action button to open a new record.



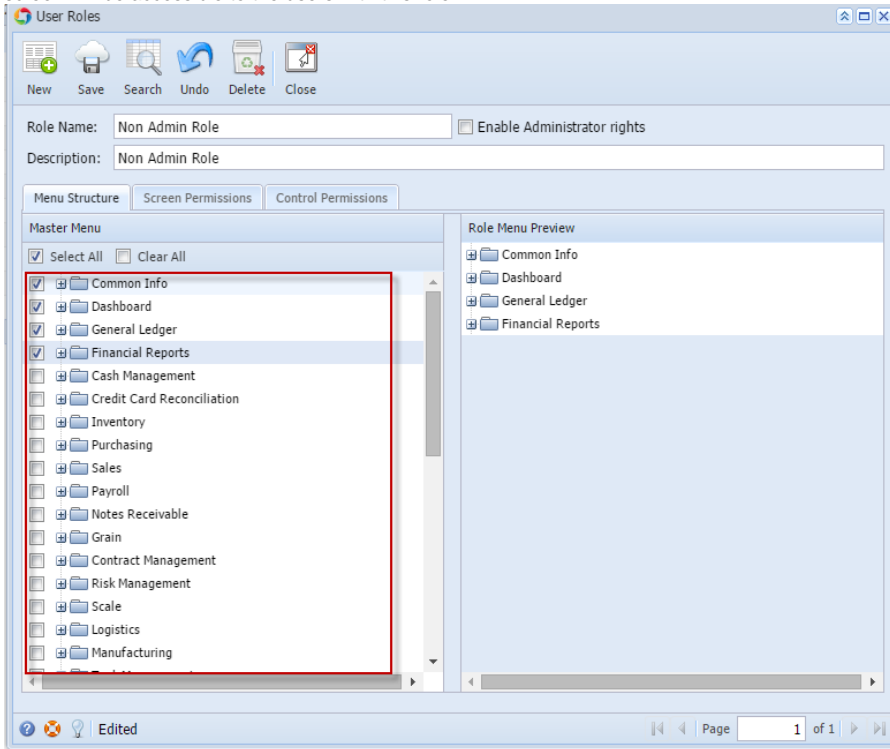
4. Enter **Role Name** and **Description**. Then click **OK** button



Notification will appear



5. Select the menus. When you deselect the root folder, all its sub-menus will also be deselected. Note that whatever menu you select on this screen will be accessible to the users with this role.



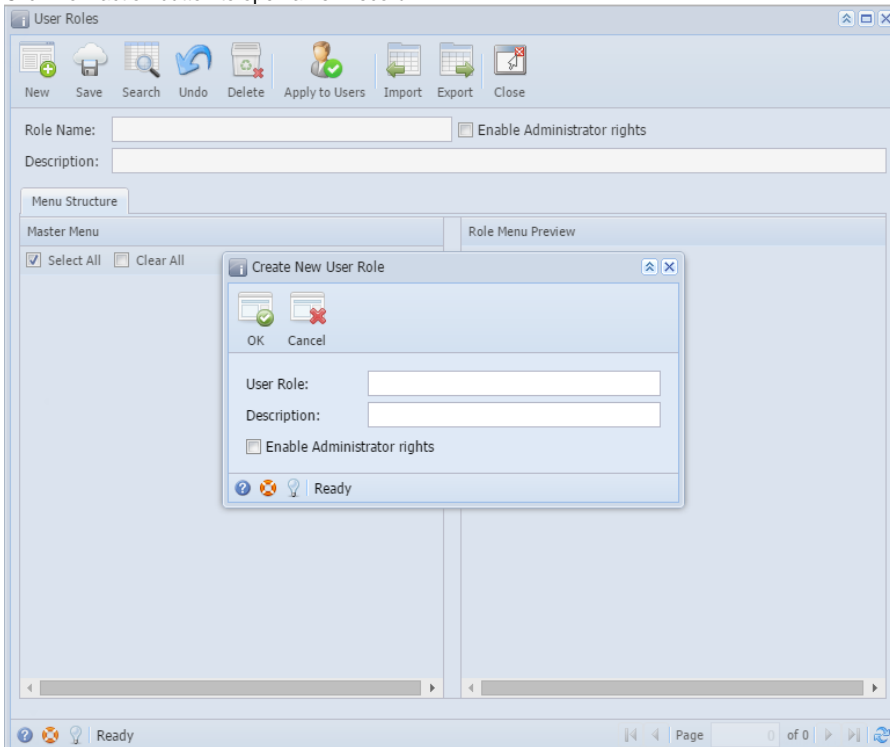
6. Click **Save** button to save the new User Role type. This message will prompt.



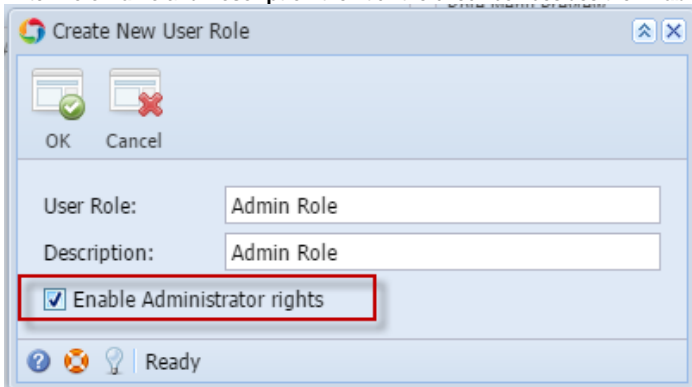
**Here are the steps on How to Add an Admin User Role Type:**

1. Log in as **Admin user**
2. On user's menu panel, go to **System Manager** folder then click **User Roles**

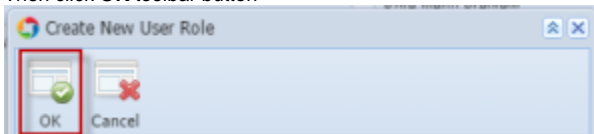
3. Click **New** action button to open a new record.



4. Enter **Role Name** and **Description** then tick the check box besides the **Enable Administrator rights**.

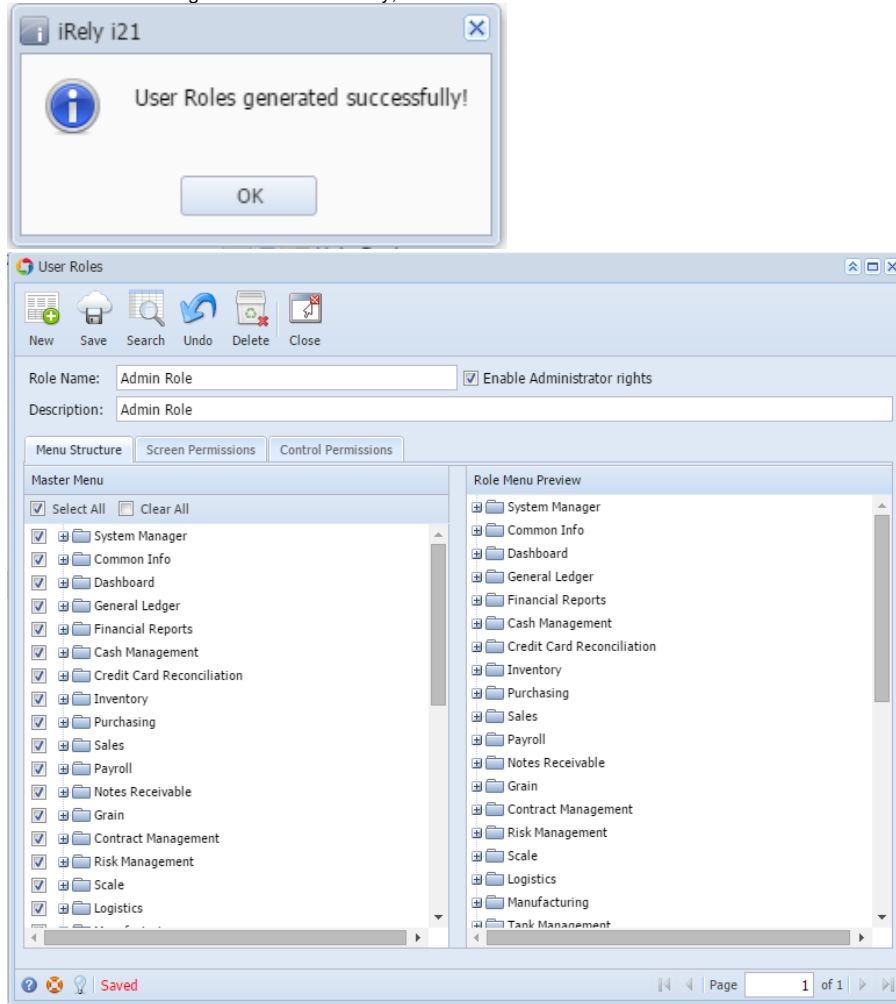


5. Then click **OK** toolbar button



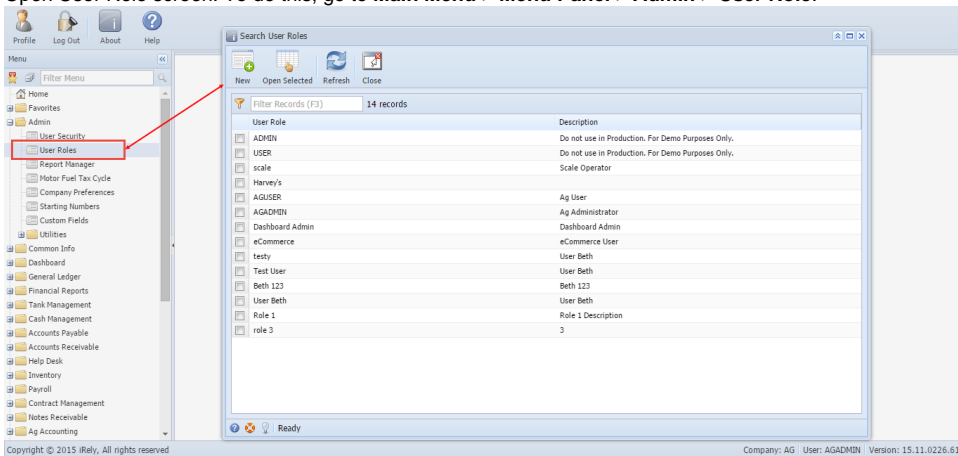


After the menus are generated successfully, all menus on the Menu Structure will have a check mark and System Manager folder is displayed

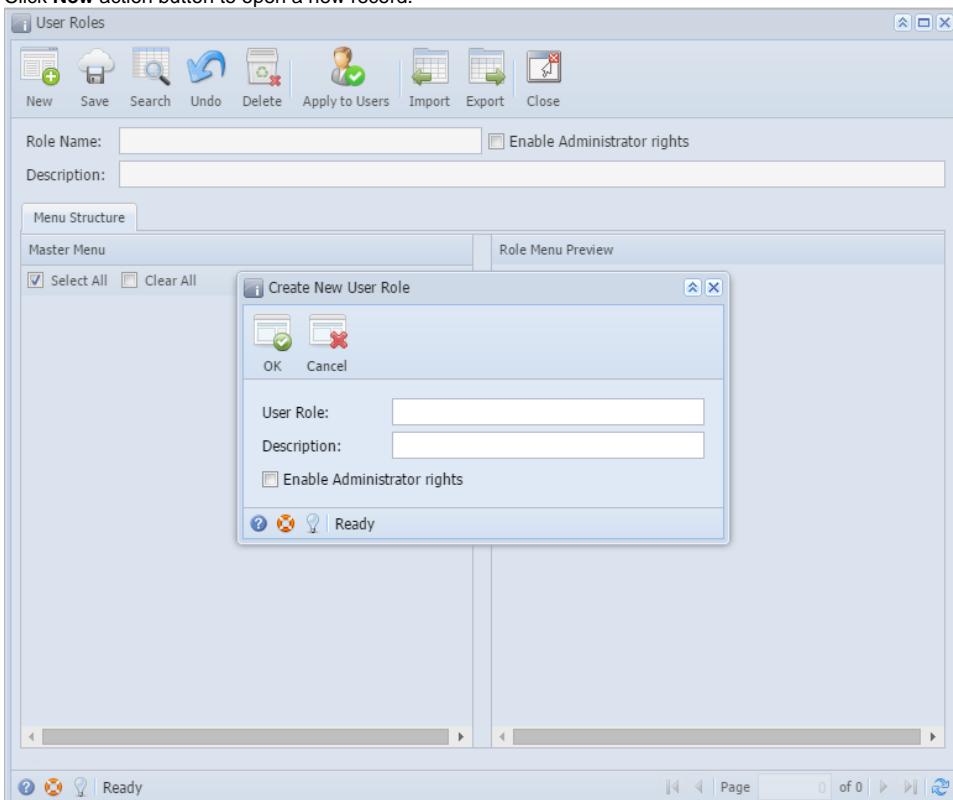


Here are the steps on How to Add a Non-Admin User Role Type:

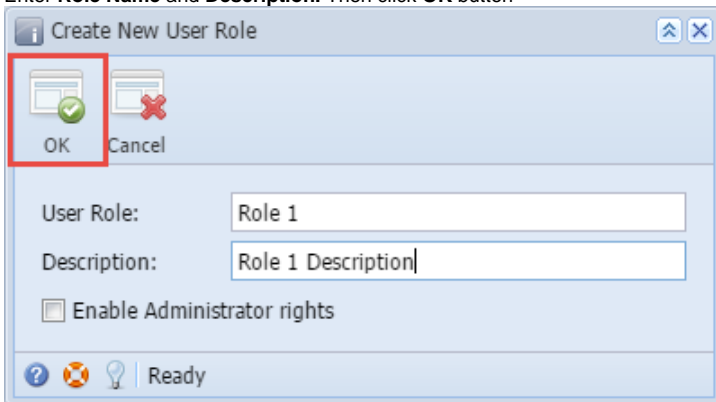
1. Open User Role screen. To do this, go to **Main Menu > Menu Panel > Admin > User Role**.



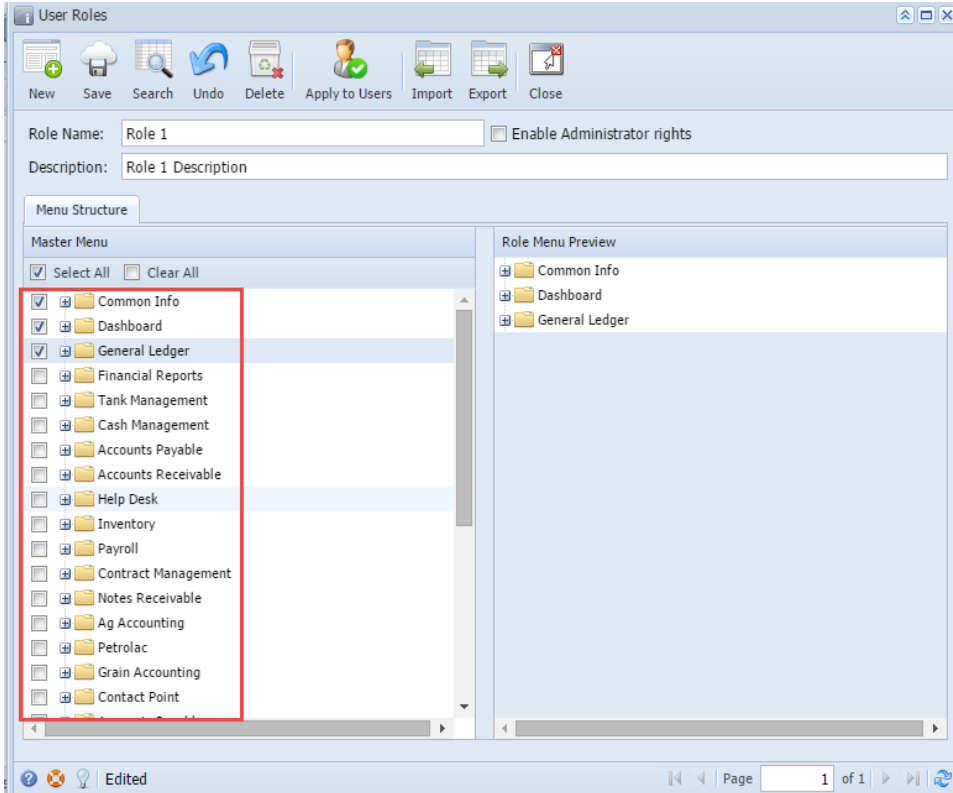
2. Click **New** action button to open a new record.



3. Enter **Role Name** and **Description**. Then click **OK** button



- Select the menus. When you deselect the root folder, all its sub-menus will also be deselected. Note that whatever menu you select on this screen will be accessible to the users with this role.

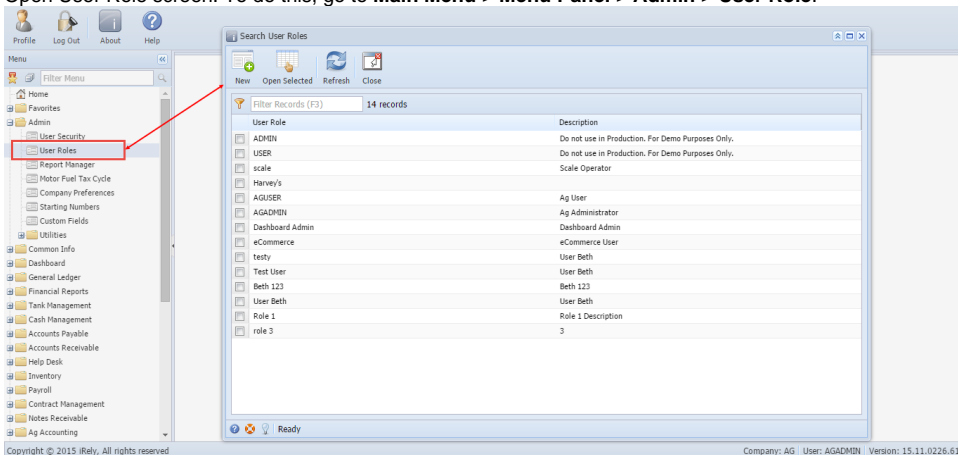


- Click **Save** button to save the new User Role type. This message will prompt.

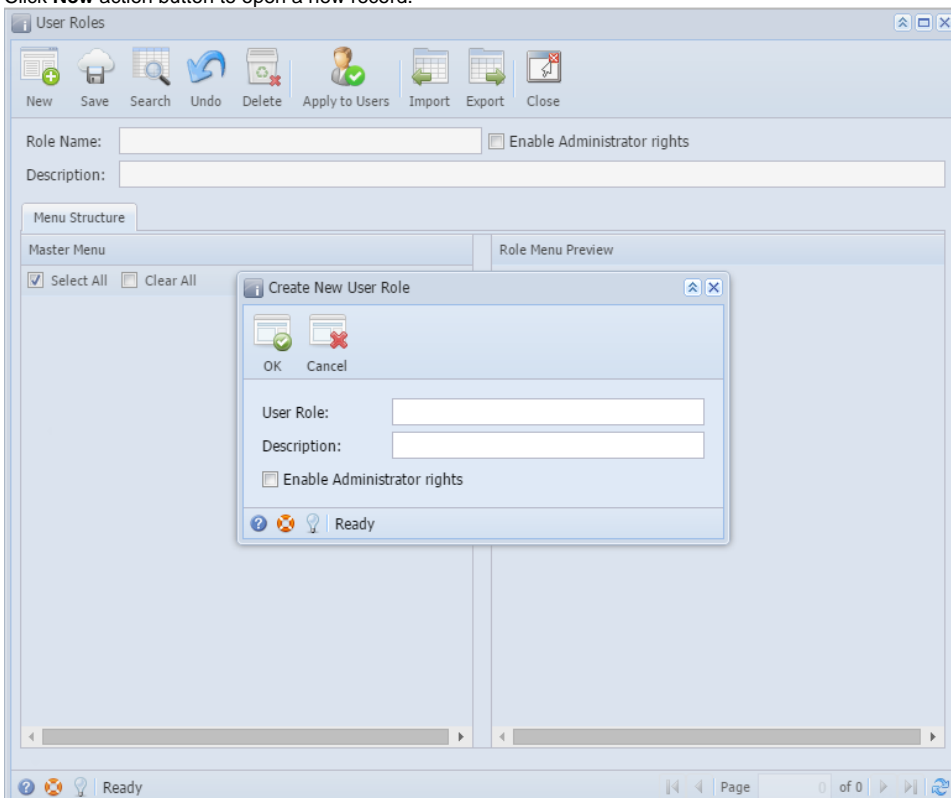


Here are the steps on How to Add an Admin User Role Type:

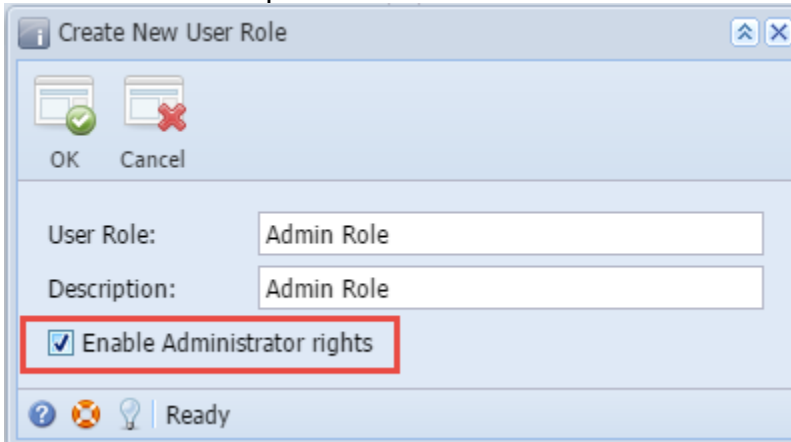
- Open User Role screen. To do this, go to **Main Menu > Menu Panel > Admin > User Role**.



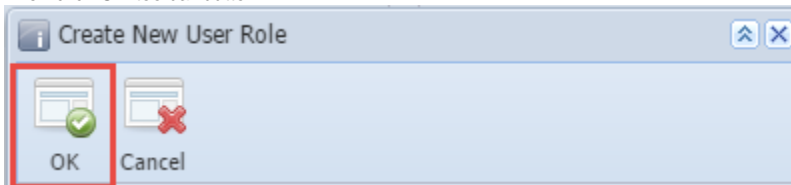
2. Click **New** action button to open a new record.



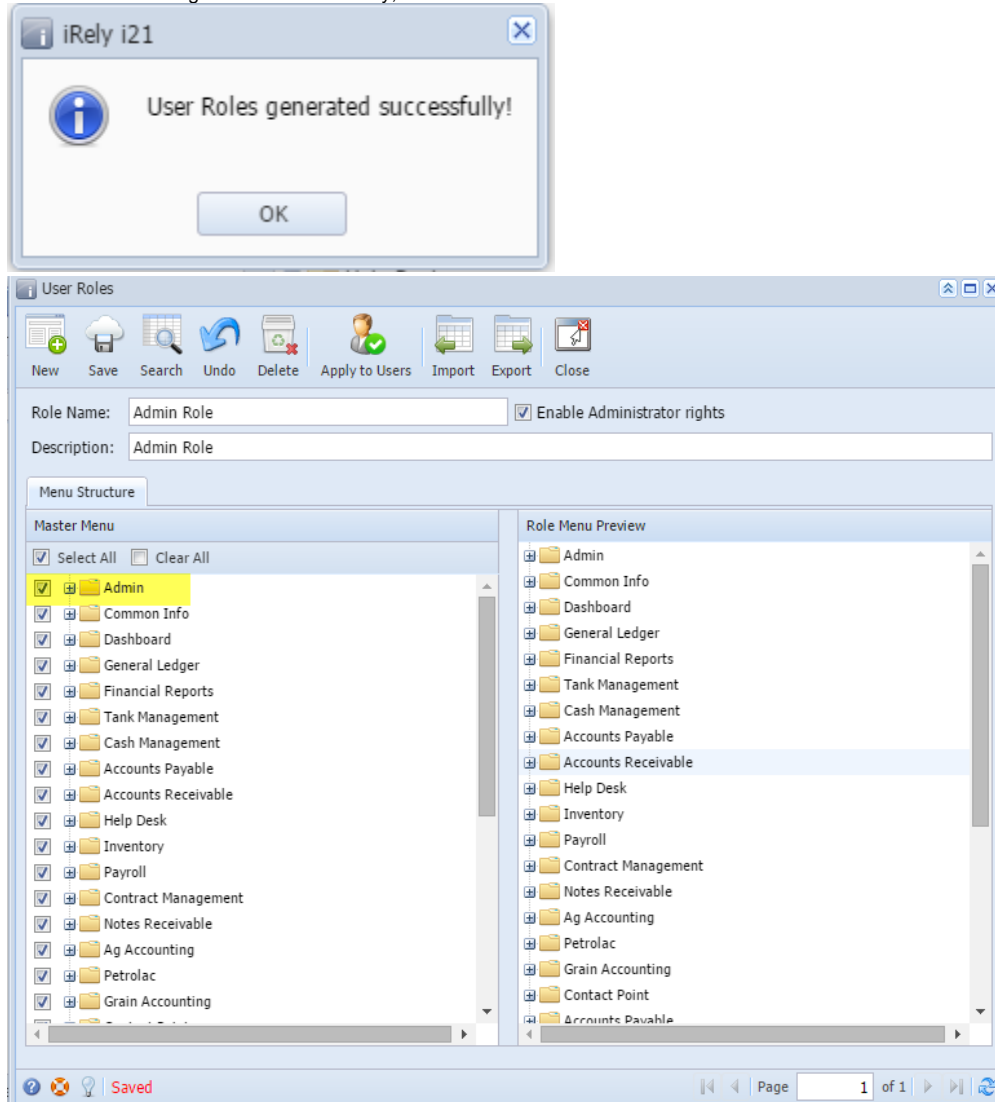
3. Enter **Role Name** and **Description** then tick the check box besides the **Enable Administrator rights**.



4. Then click **OK** toolbar button



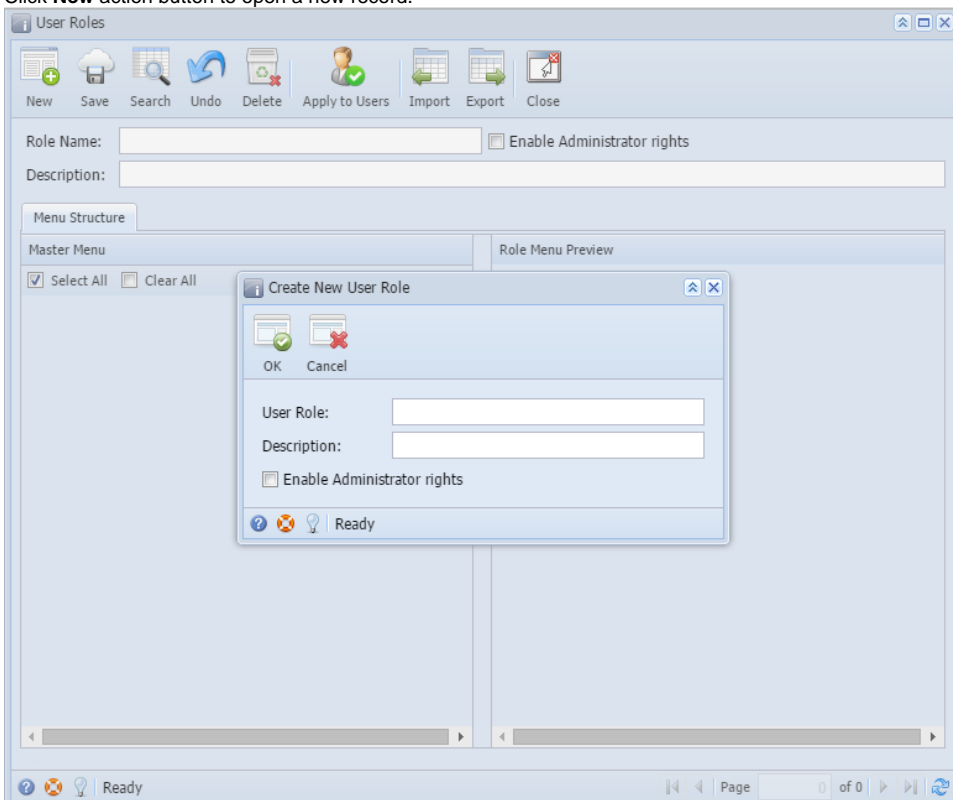
After the menus are generated successfully, all menus on the Menu Structure will have a check mark and Admin folder is displayed



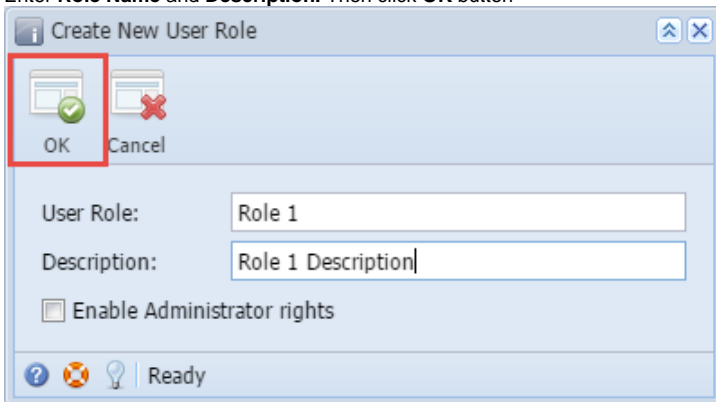
Here are the steps on How to Add User Role Type:

1. Open User Role screen. To do this, go to **Main Menu > Menu Panel > Admin > User Role**.

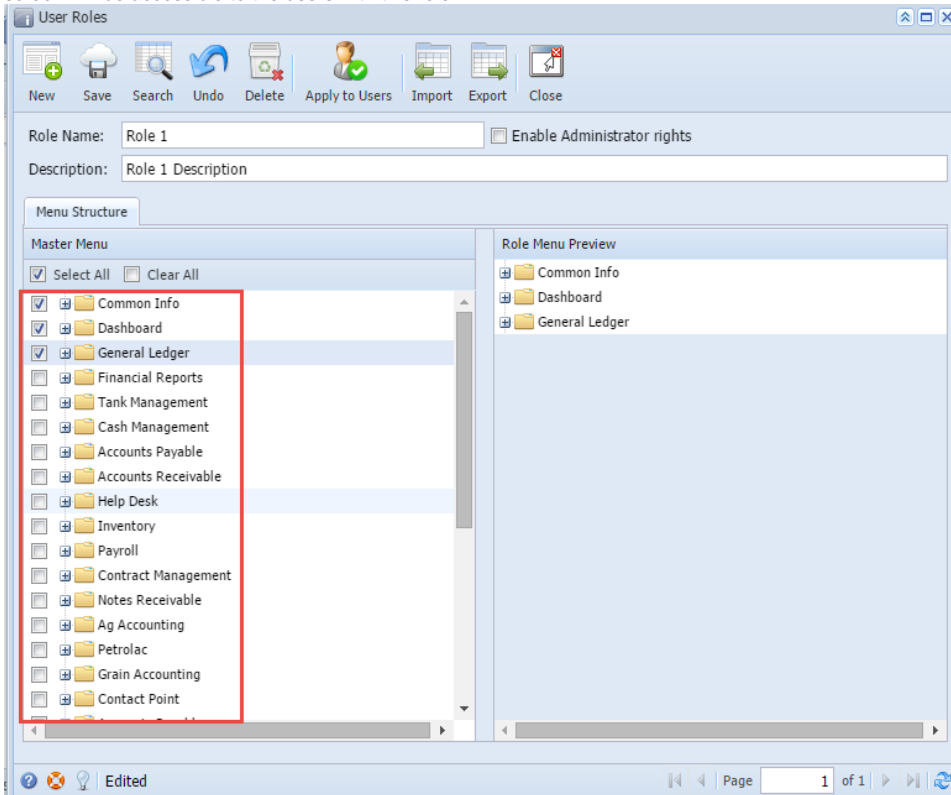
2. Click **New** action button to open a new record.



3. Enter **Role Name** and **Description**. Then click **OK** button



4. Select the menus. When you deselect the root folder, all its sub-menus will also be deselected. Note that whatever menu you select on this screen will be accessible to the users with this role.



5. Click **Save** button to save the new User Role type. This message will prompt before continue the saving.

- **Yes** – Changes will be saved and applied to all users affected.
- **No** – Changes will be saved but not be applied to all users affected.

