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

Create New User Ro	le ^ 2	×
OK Cancel		
Details		
User Role:	Non-Admin	
Description:	Non-Admin	
Role Type:	User v	
	Role Type	
⑦ ⑦ Ø Read	Administrator	
	User	

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

OK Cancel Details User Role: Admin Description: Admin Role Type: Administrator
Details User Role: Admin Description: Admin Role Type: Administrator
User Role: Admin Description: Admin Role Type: Administrator
Description: Admin Role Type: Administrator
Role Type: Administrator 🗸
Role Type
⑦ Ø P Reac Administrator
User

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:

User Role - Admin 2						/	
New Save Search Un	do Delete Di	uplicate Import	Report Clo				
Details Users Audit	Log (0)						
Role Name * Admin 2				Role Type	* Administrator		~
Description Admin 2							
Menu Layout Screen I	Permissions C	ontrol Permissions	Sub Roles				
Master Menu							
Select All Clear	All △ Up ▽	Down Filter Mer	nu				
🖌 🗄 Dashboard							Ê
🗹 🗄 System Manage	r -						
🗹 😠 Common Info							
🗹 😠 General Ledger							
🗹 😠 Financial Report	s						
🗹 😠 Cash Manageme	ent						
🗹 😠 Credit Card Rec	on						
🗹 😠 Inventory							
Purchasing (A/P)						
Sales (A/R)							
🖌 🗃 Payroll							
🗹 🔒 Notes Receivabl	e						
🗹 😠 Contract Manag	ement						
							·
? 🔘 🖓 🖂 Save	d				Id d 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. 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
- Con user's menu panel, go to System Manager folder then click User Roles
 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 Ro	le ^ X
OK Cancel	
Details	
User Role:	Non-Admin
Description:	Non-Admin
Role Type:	User v
	Role Type
⑦ 〇 〇 Read	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 I	Role	^	×
OK Cancel			
Details			
User Role:	Admin		
Description:	Admin		
Role Type:	Administrator		~
	Role Type		
⑦ ① ② Rei	ad Administrator		
	User		

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:

User Role - Admin 2	^
New Save Search Undo Delete Duplicate Import Report Close	
Details Users Audit Log (0)	
Role Name * Admin 2 Role Type * Administrator	~
Description Admin 2	
Menu Layout Screen Permissions Control Permissions Sub Roles	
Master Menu	
☑ Select All □ Clear All △ Up マ Down Filter Menu	
🗹 🗃 Dashboard	A
🗹 😠 System Manager	
Common Info	
General Ledger	
✓ ⊕ Financial Reports	
🗹 🗃 Cash Management	
Credit Card Recon	
☑ 🕢 Inventory	
Purchasing (A/P)	
Sales (A/R)	
🖉 🖶 Payroll	
V 🕢 Notes Receivable	
Contract Management	
	•
? 🗘 🖓 🖂 Saved 🛛 🕅	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. 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:

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

New Save Search Undo Delete Duplicate Import Export Close Details Users Audit Log Role Name: Description: Master Menu OK Cancel OK Cancel User Role: Description: Role Type: Administrator ⑦	User Role		^ □ ×
Details Users Audit Log Role Name: Description: Menu Structure Screen Permissions Create New User Role OK Cancel OK Cancel User Role: Description: Role Type: Administrator Role Type: Administrator Role Type: Administrator Role Type: Administrator Role Type: Administrator Role Type: Administrator Role Type: Administrator Role Type: Administrator Role Type: Role Type: Role Ty	New Save Search Undo Delete	Duplicate Import Export Close	
Menu Structure Screen Permissions Create New User Role ▲ × Master Menu OK Cancel Image: Clear All Filter Mether Details Image: Clear All Filter Mether Details Image: Clear All Filter Mether Details Image: Clear All Clear Al	Details Users Audit Log Role Name: Description:	Role Type:	~
Master Menu OK Cancel	Menu Structure Screen Permissions	Create New User Role ^ X	
	Master Menu	OK Cancel Details User Role: Description: Role Type: Administrator Image: Comparison of the second seco	

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

Create New User Ro	ole ^	×	
OK Cancel			
Details			
User Role:	Non-Admin		
Description:	Non-Admin		
Role Type:	User	~	
	Role Type		
⑦ ⑦ ⑦ Ø Read	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 Ro	ole ^	. x	
OK Cancel			
Details			
User Role:	Admin		
Description:	Admin		
Role Type:	Administrator	\sim	
	Role Type		
⑦ Ø Ø Read	Administrator		
	User		

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:

User Role - ADMIN	~ □ ×
New Save Search Undo Delete Duplicate Import Export Clos	se
Details Users Audit Log (1)	
Role Name: ADMIN	Role Type: Administrator 🗸
Description: Do not use in Production. For Demo Purposes Only.	
Menu Structure Screen Permissions Control Permissions Sub Role	25
Master Menu	Role Menu Preview
Select All Clear All Filter Menu	System Manager
System Manager	Common Info
Common Info	Dashboard
Dashboard	😠 General Ledger
General Ledger	Financial Reports
☑	Cash Management
🗹 🕢 Cash Management	Credit Card Reconciliation
Credit Card Reconciliation	Inventory
🗹 🖬 Inventory	Purchasing
Purchasing	3 Sales
🗸 🖬 Sales	B Payroll
Payroll	Notes Receivable
🗹 🕢 Notes Receivable	🗄 Grain
🖌 🖬 Grain	Contract Management
✓ ➡ Contract Management ▼	Risk Management
⑦ ۞ ♀ ⋈ Ready	I ✓ Page 1 ✓ ▷I

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.

Jser Role - Non-Admin New Save Search Undo Delete Duplicate Import Export Cid	se
Details Users Audit Log (1)	
Role Name: Non-Admin	Role Type: Vser V
Description: Non-Admin	
Menu Structure Screen Permissions Control Permissions Sub Rol	les
Master Menu	Role Menu Preview
Select All Clear All Filter Menu	Common Info
Common Info	
Jashboard	General Ledger
General Ledger	Financial Reports
✓	Cash Management
🖌 🕣 Cash Management	Inventory
🛛 😠 Credit Card Reconciliation	Purchasing
Inventory	
Purchasing	
✓	
Payroll	
Notes Pereivable	
KISK Management	
🕐 🗘 🖓 🖂 Edited	Id d Page 1 of 1 ▷ ▷

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:

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

New Save Search Undo Delete Duplicate Import Export Close Details Users Audit Log Role Name: Description: Master Menu OK Cancel OK Cancel User Role: Description: Role Type: Administrator ⑦	User Role		^ □ ×
Details Users Audit Log Role Name: Description: Menu Structure Screen Permissions Create New User Role OK Cancel OK Cancel User Role: Description: Role Type: Administrator Role Type: Administrator Role Type: Administrator Role Type: Administrator Role Type: Administrator Role Type: Administrator Role Type: Administrator Role Type: Administrator Role Type: Role Type: Role Ty	New Save Search Undo Delete	Duplicate Import Export Close	
Menu Structure Screen Permissions Create New User Role ▲ × Master Menu OK Cancel Image: Clear All Filter Mether Details Image: Clear All Filter Mether Details Image: Clear All Filter Mether Details Image: Clear All Clear Al	Details Users Audit Log Role Name: Description:	Role Type:	~
Master Menu OK Cancel	Menu Structure Screen Permissions	Create New User Role ^ X	
	Master Menu	OK Cancel Details User Role: Description: Role Type: Administrator Image: Comparison of the second seco	

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

Create New User Ro	ole ^	×	
OK Cancel			
Details			
User Role:	Non-Admin		
Description:	Non-Admin		
Role Type:	User	~	
	Role Type		
⑦ ⑦ Ø Read	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 Ro	ole ^	. x	
OK Cancel			
Details			
User Role:	Admin		
Description:	Admin		
Role Type:	Administrator	\sim	
	Role Type		
⑦ Ø Ø Read	Administrator		
	User		

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:

User Role - ADMIN	~ □ ×		
New Save Search Undo Delete Duplicate Import Export Cic	se		
Details Users Audit Log (1)			
Role Name: ADMIN	Role Type: Administrator 🗸		
Description: Do not use in Production. For Demo Purposes Only.			
Menu Structure Screen Permissions Control Permissions Sub Ro	les		
Master Menu	Role Menu Preview		
Select All Clear All Filter Menu			
🗹 🖶 System Manager	Common Info		
🗹 🗉 Common Info	Dashboard		
🗹 🗈 Dashboard	General Ledger		
🗹 🗄 General Ledger	Financial Reports		
✓	Cash Management		
🗹 🗄 Cash Management	Credit Card Reconciliation		
Credit Card Reconciliation	Inventory		
Inventory Inventory Purchasing			
✓ Purchasing	→ Sales		
Sales	Pavroli		
🗹 😠 Payroli	Notes Receivable		
Botes Receivable	Grain		
🗸 🗉 Grain	Contract Management		
Contract Management	Risk Management		
(?) (Ω) ♀ ⊠ Ready	I 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	~ □ ×
New Save Search Undo Delete Duplicate Import Export C	lose
Details Users Audit Log (1)	
Role Name: Non-Admin	Role Type: User 🗸
Description: Non-Admin	
Menu Structure Screen Permissions Control Permissions Sub R	oles
Master Menu	Role Menu Preview
Select All Clear All Filter Menu	🗃 Common Info
🗹 🗉 Common Info	Dashboard
✓ 🗷 Dashboard	General Ledger
🗹 😠 General Ledger	Financial Reports
☑ 🗷 Financial Reports	Gash Management
Cash Management	Inventory
Credit Card Reconciliation	Purchasing
Inventory	
🗹 🖪 Purchasing	
🗹 🗉 Sales	
🗌 🗷 Payroli	
🗌 🖬 Notes Receivable	
🗌 🗃 Grain	
Contract Management	
Risk Management	-
	Id d Dage 1 of 1 N
U W y Zarea	

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:

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

er Role	^ 🗆 :
ew Save Search Undo Delete Duplicate Close	
Details Audit Log	
Role Name:	Role Type: v
Description:	
Menu Structure Screen Permissions Control Permissions	
Master Menu	Role Menu Preview
Select All Clear All Fi Create New User Role	~ X
OK Cancel	
Details	
User Kole:	
Description:	
Role Type: Administrator	· · · · · · · · · · · · · · · · · · ·
⑦ ⑦ ○ Ready	
<	4
A C Ready	Id d Page 0 of 0 b b

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

Create New User Ro	le	^	×	
OK Cancel				
Details				
User Role:	Non-Admin			
Description:	Non-Admin			
Role Type:	User	~		
	Role Type			
⑦ Ø Ø Read	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 Ro	le	^ X	
OK Cancel			
Details			
User Role:	Admin		
Description:	Admin		
Role Type:	Administrator	~	
	Role Type		
⑦ Ø Ø Read	Administrator		
	User		

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:

New Seer Search Undo Delete Duplicate Close Details Audit Log (2) Role Name: ADMIN Description: ADMIN Menu Structure Screen Permissions Control Permissions Control Permissions Master Menu © Select All Clear All Clear All Filter Menu © System Manager © Common Info © Common Info © General Ledger © Financial Reports © Credit Card Reconciliation © Credit Card Reconciliation © Purchasing © Sales © Payroll © Grain © Grain © Grain
Details Audit Log (2) Role Name: ADMIN Description: ADMIN Menu Structure Screen Permissions Master Menu Control Permissions Master Menu Role Menu Preview Select All Clear All Filter Menu System Manager System Manager Common Info Dashboard Dashboard Description: Cash Management Cash Management Credit Card Reconciliation Diventory Purchasing Description: Sales Payroll Sales Grain Contract Management Role Receivable Grain Role Science Role Menu Preview
Role Name: ADMIN Role Type: Administrator Description: ADMIN Menu Structure Screen Permissions Control Permissions Master Menu Role Menu Preview Select All Clear All Filter Menu System Manager Common Info Dashboard Dashboard Dashboard General Ledger Financial Reports Cash Management Credit Card Reconciliation Inventory Purchasing Sales Payroll Sales Payroll Forain Grain Contract Management Rotes Receivable Grain Rotes Receivable Rotes Receivable
Description: ADMIN Menu Structure Screen Permissions Control Permissions Master Menu Role Menu Preview Select All Clear All Filter Menu System Manager Common Info Dashboard Dashboard General Ledger Financial Reports Binancial Reports Cash Management Credit Card Reconciliation Divertaring Sales Purchasing Sales Description: Autors Receivable Payroll Sales Divertaring Grain Contract Management Role Menu Preview Relevant Role Menu Preview Role Menu Preview Deshboard System Manager Dashboard Dashboard Deshboard General Ledger General Ledger Financial Reports Divertaring Gash Management Grain Purchasing Sales Divertaring Gash Sales Payroll Sales Payroll Divertaring Grain Contract Management Risk Management
Menu Structure Screen Permissions Control Permissions Master Menu Role Menu Preview Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager Image: System Manager <t< td=""></t<>
Master Menu Role Menu Preview Ø Select All Filter Menu Ø System Manager Ø System Manager Ø Common Info Ø Ocommon Info Ø Dashboard Ø Ø General Ledger Ø General Ledger Ø Ø General Ledger Ø Financial Reports Ø Ø Cash Management Ø Credit Card Reconciliation Ø Ø Purchasing Ø Sales Ø Ø Payroll Ø Notes Receivable Ø Ø Grain Ocontract Management Ø Ø Grain Ø Risk Management
Select All Clear All Filter Menu System Manager System Manager System Manager Common Info Dashboard Dashboard Dashboard General Ledger General Ledger Financial Reports Gash Management Cash Management Gash Management Credit Card Reconciliation Dashboard Credit Card Reconciliation Dashboard Purchasing Dashboard Seles Dashboard Seles Dashboard Grain Dashboard Risk Management Dashboard Risk Management
Image: System Manager Image: System Manager
Image: Solution of the soluti
Bashboard Bashboard Bashboard Bashboard Bashboard
Image: Seles Image: Seles Image: Seles Image: Seles Image:
Image: Second
Image: Cash Management Imagement Image: Credit Card Reconciliation Inventory Image: Credit Card Reconciliation Imagement Imagement Imagement
Inventory Inventory Inventory Purchasing Inventory Sales Inventory Inventory Inventory Purchasing Inventory Inventory Inventory Purchasing Inventory Inventory Inventory
Inventory Purchasing Purchasing Sales Sales Payroll Payroll Notes Receivable Grain Grain Contract Management Risk Management
Image: Purchasing Image: Sales Image: Payroll Image: Payroll Image: Payroll Image: Payro
Image: Sales Image: Payroll Image: Sales Image: Payroll Image: Payroll Image: Notes Receivable Image: Sales Image: Payroll Image: Sales Image: Sales
Payroll Payroll
Image: Section and Sectio
Grain Grain Grain Risk Management
Contract Management Bisk Management
Risk Management B Scale
Scale End Logistics
Logistics 🖼 Manufacturing
Manufacturing Tank Management
0 0 ∞ Ready

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.

New Save Search Undo Delete Duplicate Close	
Details Audit Log (1)	
Role Name: Non-Admin	Role Type: Vser V
Description: Non-Admin	
Menu Structure Screen Permissions Control Permissions	
Master Menu	Role Menu Preview
Select All Clear All Filter Menu	Common Info
Common Info	General Ledger
Dashboard	😠 Cash Management
🗹 😠 General Ledger	Sales
Financial Reports	
🗹 😠 Cash Management	
Credit Card Reconciliation	
Inventory	
Purchasing	
✓	
🗋 🗈 Payroll	
Notes Receivable	
🗌 🗄 Grain	
Contract Management	
🗌 🗈 Risk Management	
Scale 🔻	
⑦ ① ♀ 云 Edited	4 4 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:

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

ser Role New Save Search Llodo Delete Duniirate Close	~ 🗆 >
Details Audit Log	
Role Name: Role Type:	~
Description:	
Menu Structure Screen Permissions Control Permissions	
Master Menu Pro	review
OK Cancel Details User Role: Description: Role Type: Administrator	
	•
) 🗘 🖓 🖂 Ready	

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

Create New User Ro	ble	~ ×	
OK Cancel			
Details			
User Role:	Non-Admin		
Description:	Non-Admin		
Role Type:	User	~	
	Role Type		
⑦ Ø ♀ Read	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 R	ole	^ X	
OK Cancel			
Details			
User Role:	Admin		
Description:	Admin		
Role Type:	Administrator	~	
	Role Type		
⑦ 〇 〇 〇 Rea	c 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		^ X
OK Cancel		
Details		
User Role:	Contact	
Description:	Contact	
Role Type:	Contact	~
	Role Type	
⑦ ① ② Read	Administrator	
	User	
	Contact	

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

User Role - Contact		^ □ X
Details Audit Log (0)		
Pole Nerrow Course	Dela Turan	
Kole Name: Contact	Kole Type: Contact	
Description: Contact		
Menu Structure Screen Permissions		
Master Menu	\frown	
Select All 🔲 Clear All 🛛 Filter M		
Common Info		
Dashboard		
🔲 🖪 🛛 General Ledger		
Financial Reports	iPoly i21	
Cash Management		
Credit Card Reconciliation	User Roles generated successfully!	
Inventory		
Purchasing	ок	
L 🖽 Sales		
He Payroll		
Grain		
Contract Management		
Risk Management		
□ 🕀 Scale		
Logistics		
Manufacturing		
Tank Management	×	
🕐 🔀 🖓 🖂 Saved	II 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 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.

					^
New Save Search Undo Delete Duplicate Close					
Details Audit Log (1)					
Polo Nama: Content	Polo T		C		
Description C	Kole I	/pe:	Contact		
Description: Contact					
Menu Structure Screen Permissions Control Permissions					
Master Menu	Role	Menu Preview	v		
Select All Clear All Filter Menu		Common Info)		
Common Info		Dashboard			
Dashboard		General Ledg	er		
General Ledger		Sales			
Financial Reports		56105			
Credit Card Reconciliation					
Inventory					
Purchasing					
✓ ± Sales					
Payroll					
□					
Grain					
Contract Management					
Risk Management					
Scale					
Manufacturing					
Tank Management					
	•				
				Deere	4 -44
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Click Save button to save the new User Role type. The	nis mes	sage will	prompt.		
15					
4 (n)					
iRelv i2	1				
iRely i2	1				
iRely i2	1 ccess	fully!			
iRely i2 User Roles applied sur	1 ccess	fully!			
iRely i2 User Roles applied sur	1 ccess	fully!			
iRely i2 User Roles applied sur	1 ccess	fully!			
iRely i2 User Roles applied sur OK	1 ccess	fullyl			

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.

🎝 User Role						* • ×
New Save Se	earch Undo Delete	Duplicate				
Role Name:				🔲 Enable Administrator rig	Ihts	
Description:						
Menu Structure	Screen Permissions	Control Permissions	Compar	ny Locations		
Master Menu				Role Menu Preview		
Select All	Clear All					
	G Create OK User R Descrip E Ena	New User Role	ts			
<	eady		•	4	A Page	0 of 0 > >

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

1	🗊 Create New User Role 🔹 🙁		
1	OK Cancel		
1	User Role:	Non Admin Role	
r	Description:	Non Admin Role	
2	📃 Enable Administ	rator rights	
	🕜 这 🏆 Ready		
Ν	lotification will appear		
	👔 iRely i21	×	
	User Roles	s generated successfully!	
		ОК	

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.

User Kole - Non Admin Kole	
New Save Search Undo Delete Duplicate Close	
Role Name: Non Admin Role	
Description: Non Admin Role	
Menu Structure Screen Permissions Control Permissions Company Locations	
Master Menu Role Menu Preview	
Select All Clear All	
V 🗉 🗖 Common Info	
📝 🕀 🗖 Dashboard 🛛 🖉 🛱 🗍 General Ledger	
V 🗵 🧰 General Ledger	
Financial Reports	
Cash Management	
B Purchasing	
Sales	
🔲 🕀 🧰 Payroll	
B D Notes Receivable	
Grain	
Contract Management	
RISK Management	
Manufacturing	
	•
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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
- Click New action button to open a new record.

🇊 User Role		
New Save Search Uni	Image: Close	
Role Name:	Enable Administrator rights	
Description:		
Menu Structure Screen Pe	ermissions Company Locations	
Master Menu	Role Menu Preview	
🔽 Select All 📃 Clear All		
	🗘 Create New User Role	
	UK Cancel	
	User Role:	
	Description:	
	Enable Administrator rights	
	🕢 🧔 👔 Ready	
	× 4	•
🕜 🤨 🖓 😥 Ready	A Page	0 of 0 🕨 🕅

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

	🕼 Create New User Role			×
	OK Cancel			
	User Role:	Admin Role		
	Description:	Admin Role		
	🔽 Enable Administ	rator rights		
	🕜 📀 🏆 Ready			
5. 1	Then click OK toolbar bu	tton	_	
	Create New User Role		* ×	
	OK Cancel			

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

👔 iRely i21	×
User Roles applied successful	ly!
ОК	
🗊 User Role - Admin Role	
New Save Search Undo Delete Duplicate Close	
Role Name: Admin Role	Enable Administrator rights
Description: Admin Role	
Manu Structure Screen Dermissions Control Dermissions Com	any locations
Mether Menu	Pala Manu Daniau
Master Menu	Kole Menu Preview
	Common Info
	🕀 🧰 Dashboard
✓ → Dashboard	🕀 🧰 General Ledger
✓ ⊕ ☐ General Ledger	🕀 🧰 Financial Reports
📝 🕀 🧰 Financial Reports	🗃 🧰 Cash Management
🔽 🕀 🧰 Cash Management	Credit Card Reconciliation
✓ 🛛 🧰 Credit Card Reconciliation	Inventory Development
Inventory	The sales
we rundsing Sales	🕀 🧰 Payroll
	🕀 🧰 Notes Receivable
V D Notes Receivable	🕀 🧰 Grain
🕼 🕀 Grain	Contract Management
✓ ⊕ Contract Management	Risk Management
💟 🗉 🧰 Risk Management	Scale
☑ 🕀 🔂 Scale	Logistics Manufacturing
V B Logistics	Tank Management
•	•
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Here are the steps on How to Add a Non-Admin User Role Type:

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

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

🕽 User Roles		* 🗆
🐻 🔓 🔯 🍞		
New Save Search Undo	Delete Close	
Role Name:	🔲 Enable Administrator rights	
Description:		
Menu Structure Screen Perm	issions Control Permissions Pole Menu Preview	
Select All 🔲 Clear All	Note Helle Frence W	
	Create New User Role	× ×
	OK Cancel	
	User Role:	
	Description:	
	Enable Administrator rights	
	🕜 🔕 🏆 Ready	
🗿 😒 🏆 Ready	Necessities Then elick OK button	4 Page 0 of 0 ▶
Create New User	Role	×
OK Cancel		
User Role:	Non Admin Role	
Description:	Non Admin Role	
Enable Admini	strator rights	
	stator rights	
🕜 😒 🏆 Ready		
tification will appear		
👔 iRely i21	×	
User R	oles applied successfully!	
	ОК	

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.

🗘 User Roles	× 🗆 ×
New Save Search Undo Delete Close	
Role Name: Non Admin Role	Enable Administrator rights
Description: Non Admin Role	
Menu Structure Screen Permissions Control Permissions	
Master Menu	Role Menu Preview
🕼 Select All 📃 Clear All	🕀 🧰 Common Info
🕼 🗄 🗖 Common Info	🕀 🚞 Dashboard
✓ ⊕ □ Dashboard	🕀 🧰 General Ledger
🕼 🕀 🔂 General Ledger	Financial Reports
🔽 🗉 🗁 Financial Reports	
📄 🕀 🚍 Cash Management	
🔲 🕀 🧰 Credit Card Reconciliation	
Inventory	
Purchasing	
□ ⊕ □ Sales	
Payroll	
D → Notes Receivable	
Grain	
A manufacturing	
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6. Click Save button to save the new User Role type. This message will prompt.

📳 iRely i	21 🗙
0	User Roles generated successfully!
	ОК

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

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

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

	User Roles		* 🗆 ×
	New Save Search Undo	Delete Apply to Users Import Export Close	
	Role Name:	📃 Enable Administrator r	ights
	Description:		
	Menu Structure		
	Master Menu	Role Menu Preview	
	Select All 📃 Clear All	Create New User Role	× ×
		OK Cancel	
		User Role:	
		Description:	
		Enable Administrator rights	
		🔞 📀 🧏 Ready	
			4
	🕜 🧔 🤉 Ready		4 4 Page 0 of 0 ▶ ▶ 2
4.	Enter Role Name and D	escription then tick the check box besides the	e Enable Administrator rights.
	🗊 Create New User F	ole	× ×
	OK Cancel		
	User Role:	Admin Role	
	Description:	Admin Role	
	Enable Administ	rator rights	
	-		
	🕜 这 🏆 Ready		
5.	Then click OK toolbar be	utton	
	😋 Create New User Role	× ×	
	OK Cancel		

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

I IKely IZI	
User Roles generated success	fully!
ОК	
User Roles	
New Save Search Undo Delete Close	
Role Name: Admin Role	☑ Enable Administrator rights
Description: Admin Role	
Menu Structure Screen Permissions Control Permissions	
Master Menu	Role Menu Preview
V Select All Clear All	System Manager
V 🖶 System Manager	Gommon Info Dashboard
Bachboard	Gommon Info General Ledger
B	Gommon Info Dashboard General Ledger General Ledger General Ledger General Ledger
✓ ⇒ System Manager ✓ ⇒ Common Info ✓ ⇒ Dashboard ✓ ⇒ General Ledger ✓ ⇒ Financial Reports	Common Info Comm
✓ ⇒ System Manager ✓ ⇒ Common Info ✓ ⇒ Dashboard ✓ ⇒ General Ledger ✓ ⇒ Financial Reports ✓ ⇒ Cash Management	Common Info Comm
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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.

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Image: Note: Image: Note: <td< td=""><td>Profile Log Out About Help</td><td>Search User Roles</td><td></td><td>× 🗆 🗙</td></td<>	Profile Log Out About Help	Search User Roles		× 🗆 🗙
Provintes Price Records (1)	Menu (K)	New Open Selected Refresh Close		
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Important □ ADDN Do those in Production, For Demo Purpose Doly, Import Management Import Scale Operator Import Management Scale Operator Scale Operator	J 🗁 Admin	User Role	Description	
International International International I	User Security	ADMIN	Do not use in Production. For Demo Purposes Only.	
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Add CMPN Add CMPN Add CMPN Add CMPN Cather Med Control Med Contro	Company Preferences	AGUSER	Ag User	
L dafine relation L dafine rel	Starting Numbers	AGADMIN	Ag Administrator	
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Instantial Reports Entil 123 Beil 123 Chail Response User Beh User Beh Chail Response Rel 1 Rel 1 Description Chail Response Rel 1 Rel 1 Description Chail Response Intel 3 Secondary Report Projic Desk Intel 3 Secondary Response Intel Secondary Intel 3 Secondary Response Secondary Response Intel 3 Secondary Response	General Ledger	Test User	User Beth	
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Accounts Previouble Control Co	🚞 Cash Management	Role 1	Role 1 Description	
Accounts Image: second seco	Accounts Payable	role 3	3	
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Payoll Contract Management Intelse Receivable Image: Contract Management Ap Accounting Image: Contract Management	inventory			
Contract Masagement Directors Recented Ag Accounting C Ready	Payroll			
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	Ag Accounting	A C Meany		

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

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.

User Roles				* 🗆 ×
New Save Search Under	Delete Apply to Users	Import Export	Close	
Role Name: Role 1		E	nable Administrator rights	
Description: Role 1 Descrip	tion			
Menu Structure				
Master Menu		Ro	le Menu Preview	
Select All Clear All			Common Info	
Common Info	-		Dashboard	
Dashboard			📄 General Ledger	
🔽 🕀 General Ledger				
🔲 🗉 📄 Financial Reports				
📄 🗉 📄 Tank Management				
📄 🗉 📄 Cash Management				
📄 🗉 📄 Accounts Payable				
📃 🗄 🚞 Accounts Receivable	8			
📄 🕀 📄 Help Desk				
🔲 🗉 🚞 Inventory				
Payroll				
Contract Managemen	nt			
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Ag Accounting				
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Grain Accounting				
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Click Save button to save	e the new User Role	type. This m	essage will prompt.	
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IKely 121			<u> </u>	

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0	User Roles generated successfully!
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Here are the steps on How to Add an Admin User Role Type:

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

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Profile Log Out About Help	Search User Roles	* 🗆 ×	
Menu (%)	New Open Selected Refresh Close		
Favorites	Filter Records (F3) 14 records		
B 🚔 Admin	User Role	Description	
User Security	ADMIN	Do not use in Production. For Demo Purposes Only.	
User Roles	USER	Do not use in Production. For Demo Purposes Only.	
Report Manager	🔄 scale	Scale Operator	
Motor Fuel Tax Cycle	Harvey's		
Company Preferences	AGUSER	Ag User	
Starting Numbers	AGADMIN	Ag Administrator	
Custom Fields	Dashboard Admin	Dashboard Admin	
Common Info	eCommerce	eCommerce User	
B Dashboard	E testy	User Beth	
General Ledger	Test User	User Beth	
Financial Reports	Beth 123	Beth 123	
🗄 🚞 Tank Management	User Beth	User Beth	
🗃 🧰 Cash Management	Role 1	Role 1 Description	
🗃 🧰 Accounts Payable	role 3	3	
🗃 🛄 Accounts Receivable			
🗃 🛄 Help Desk			
Inventory			
B Payroll			
Contract management			
An Accounting	🕜 💆 🖓 Ready		
w accounting v			
Copyright © 2015 iRely, All rights reserved		Company: AG User: AGADMIN Version: 15.	.11.0226.61

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

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			Q	5	0	2			F						
	Ne	w Save	Search	Undo	Delete	Apply to Users	Import	Export	Close						
	Ro	le Name:						E E	inable Ad	ministrator	rights				
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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.

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.

User Roles	
New Save Search Undo Delete Apply to Users Import	Export Close
Role Name: Role 1	Enable Administrator rights
Description: Role 1 Description	
Menu Structure	
Master Menu	Role Menu Preview
Select All 🔲 Clear All	🕀 🚞 Common Info
Common Info	🕀 🧰 Dashboard
🔽 🗉 Dashboard	🕀 🔚 General Ledger
📝 🕀 🧰 General Ledger	
Financial Reports	
Tank Management	
Cash Management	
Accounts Payable	
Inventory	
Payroll	
🔲 🗉 🛅 Contract Management	
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Contact Point	
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- 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.

🔚 iRely	i21 X
?	Do you want to apply these changes to all users affected?
	Yes No