How to Import a User Role

Exporting/Importing a User Role helps the PM to configure sets of roles that can be used in mass deployment for customers.

Here are the steps to Import a User Role:

- 1. Log in as Admin user
- 2. On user's menu panel, go to System Manager folder then click User Roles
- 3. Select and open one user role

User Role - RoleAA		□ ×
New Save Search Undo Delete Duplicate Import Report	Close	
Details Users Audit Log (2)		
Role Name * RoleAA	Role Type * User	~
Description RoleAA		
Menu Layout Screen Permissions Control Permissions Sub R	Roles	
Master Menu		
☑ Select All 🗌 Clear All 🛆 Up 🗢 Down Filter Menu		
🗹 🖶 Dashboard		
🗹 😠 Common Info		
General Ledger		
Cash Management		
Credit Card Recon		
Inventory		
□ Purchasing (A/P)		
■ Sales (A/R)		
Pavroll		
🗌 🔄 Contract Management		
🗌 🖪 Risk Management		-
? 💭 🖓 🖂 Ready	A Page 1 of 1	

4. Click the Import toolbar button



- 5. Select the CSV file from the file browser
- 6. A warning message will appear, to proceed with importing click the **Yes** button

(!)				
iRely i21				
This will overwrite the role configuration of RoleAA. Do you want to continue?				
Yes No				

7. Once importing is successful, this message will appear

Details User	rs Audit Log (2)			
Role Name *	RoleAA	Role Type * Administ	trator	~
Description	Do not use in Product	ion. For Demo Purposes Only.		
Menu Layout	Screen Permissions	Control Permissions Sub Roles		
Master Men	u			
🖉 Select All	🗌 Clear All 🛛 🛆 Up	▽ Down Filter Menu		
🗸 😠 Dash	board			*
🖌 🕀 Syste	em Manager			
🗸 🕀 Comi	mon Info			
🗸 🖬 Gene	eral Ledger			
- Einar	acial Reports			
	Management			
Casir	iwanagement	Daly 21		
Credi	it Card Recon	IRely 121		
🗹 🕀 Inver	ntory	Importing successful.		
🗹 🕀 Purch	hasing (A/P)			
🗹 😠 Sales	; (A/R)	ОК		
🗹 😠 Payro	ll			
V 🕀 Note	s Receivable			
🗸 🕀 Cont	ract Management			
				-

() Previous Menu structure, Description and Role Type will be replaced with the imported user role.

Here are the steps to Import a User Role:

- 1. Log in as Admin user
- 2. On user's menu panel, go to System Manager folder then click User Roles
- 3. Select and open one user role



4. Click the Import toolbar button

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	~

5. Select the CSV file from the file browser

6. A warning message will appear, to proceed with importing click the Yes button iRely i21 This will overwrite the role configuration of Non-Admin. Do you want to continue? Yes No

7. Once importing is successful, this message will appear



Previous Menu structure, Description and Role Type will be replaced with the imported user role. Here are the steps to Import a User Role:

- 1. Log in as Admin user
- 2. On the user's menu panel, Select Admin folder

3. Select and double click User Role menu

💩 🕪 🛄 🔮	Search User Roles		8 D X
Menu ()			
Home Favorites	New Open Selected Refresh Close Y Filter Records (F3) 14 records		
🛛 🚞 Admin	User Role	Description	
User Security	ADMIN	Do not use in Production. For Demo Purposes Only.	
Report Manager	USER	Do not use in Production. For Demo Purposes Only.	
Motor Fuel Tax Cycle	scale	Scale Uperator	
Company Preferences	A CUSED	An line	
I Starting Numbers	AGODER	Ag User	
Custom Fields	Dathboard Admin	Dathbard Admin	
B 🔚 Utilities	a commerce	eCommerce licer	
B Common Info	T testy	Liser Beth	
🕀 🧰 Dashboard	Test User	User Beth	
General Ledger	Beth 123	Beth 123	
Financial Reports	User Beth	User Beth	
I ank Management	Role 1	Role 1 Description	
Accounts Pavable	role 3	3	
Accounts Receivable			
🗄 🛄 Help Desk			
H inventory			
🗃 🧰 Payroll			
Contract Management			
Indes Receivable	2 C Pardy		
Copyright © 2015 iRely, All rights reserved		Company: AG User: A	AGADMIN Version: 15.11.0226.6
Select one user role or C	Create New User Role type		
User Roles	button		* 🗆 X
New Save Search Lindo	Delete Apply to Users	Evont Close	
	Selece Apply to oscio import		
Role Name: ADMIN		Enable Administrator rights	
Description: Do not use in F	Production. For Demo Purposes Only	/.	
Select the CSV file from	the file browser		

() Previous Menu structure will be replaced with the imported user role