How to Export 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 Export 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

Details Users Audit Log (30)					
Role Name * ADMIN			Role Type	* Administrator	
Description Do not use in Produc	ction. For Demo Pur	poses Only.			
Menu Layout Screen Permissions	Control Permissio	ins Sub Role	s		
Master Menu					
🖉 Select All 🗌 Clear All 🛆 Up	▽ Down Filter	Menu			
✓ 😠 Dashboard					Â
🖌 😠 System Manager					
🗹 😠 Common Info					
🗹 😠 General Ledger					
✓					
🖌 🗄 Cash Management					
🖌 😠 Credit Card Recon					
🖌 🗄 Inventory					
✓					
Sales (A/R)					
🖌 😠 Payroll					
🖌 🕀 Notes Receivable					
Contract Management					

4. Click the Report button

User Role - ADMIN	^ □ ×						
New Save Search Undo Delete Duplicate Import <mark>Report</mark> Close							
Details Users Audit Log (30)							
Role Name * ADMIN Role Type * Administrator	~						
Description Do not use in Production. For Demo Purposes Only.							

A CSV file will be downloaded containing the menu structure of the user role



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User Role - ADMIN ^ 🗆 X											
New Save Search Undo Delete Duplicate Import Export Close											
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										
System Manager	Common Info										
🗹 😠 Common Info	Dashboard										
🗹 🕑 Dashboard	General Ledger										
🗹 🗃 General Ledger	Financial Reports										
Financial Reports	☑ Cash Management										
Cash Management	Credit Card Reconciliation										
Credit Card Reconciliation	Inventory										
Inventory	Purchasing										
Purchasing											
✓ ⊕ Sales	Payroll										
🖌 😠 Payroll	Notes Receivable										
✓ 😠 Notes Receivable	Grain										
🗹 😠 Grain	Contract Management										
Contract Management	Risk Management										
Ø ₱ ♀ ₩ Ready	Id d Page 1 of 1 b b										
U 🦦 y 🖂 neady	IIA A LORG I OLI A AL										

4. Click the Export button

User Role - ADMIN ^							
New Save Search Undo Delete Duplicate Import Export Close							
Details Users Audit Log (1)							
Role Name: ADMIN Role Type: Administrator			~				
Description: Do not use in Production. For Demo Purposes Only.							

G A CSV file will be downloaded containing the menu structure of the user role



Here are the steps to Export a User Role:

- Log in as Admin user
 On the user's menu panel, Select Admin folder
 Select and double click User Role menu

Profile Log Out About Help	Se Se	arch User Roles		* 🗆 ×
lenu 📧				
🗧 🥩 Filter Menu 🔍	Nev	Open Selected Refresh Close		
A Home				
Favorites		Filter Records (F3) 14 records		
3 🛗 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	B	AGUSER	Ag User	
Starting Numbers		AGADMIN	Ag Administrator	
Custom Fields	- E	Dashboard Admin	Dashboard Admin	
B Utilities	E.	eCommerce	eCommerce User	
Common Info		testy	User Beth	
B Dashboard		Test User	User Beth	
General Ledger		Beth 123	Beth 123	
Financial Reports	in in	User Beth	User Beth	
Cash Management	m	Role 1	Role 1 Description	
Cash Management		role 3	3	
Accounts Pereivable				
Help Desk				
Pavroll				
Contract Management				
Notes Receivable				
Ag Accounting	0	🧕 👷 Ready		

4. Select one user role or Create New User Role type

5. Click the **Export** toolbar button

User Roles									
	e New) Save	Search	S Undo	Delete	Apply to Users	Import	Export	Close
	Role Name:		ADMIN I Enable Administrator rights						
	Description: Do not use in Production. For Demo Purposes Only.								

A CSV file will be downloaded containing the menu structure of the user role

