



LogicPath Roles Description

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Diagram	Error! Bookmark not defined.

Overview

Roles - General Maintenance

Overview

Roles define what permissions the Users have access to. To log into C3 Financial, a user must have a role. The first step to managing users is to understand the roles. C3 Financial will be hardcoded with default roles defined and unlimited custom roles can be added. Click on Roles and a box will display all the roles in the application.

Add New/ Edit tabs

Roles - Detail

- *Name:* Role Name
- *Description:* Description of Role
- *Landing View:* Landing Page upon login of Users assigned to this Role.

Roles – Permissions

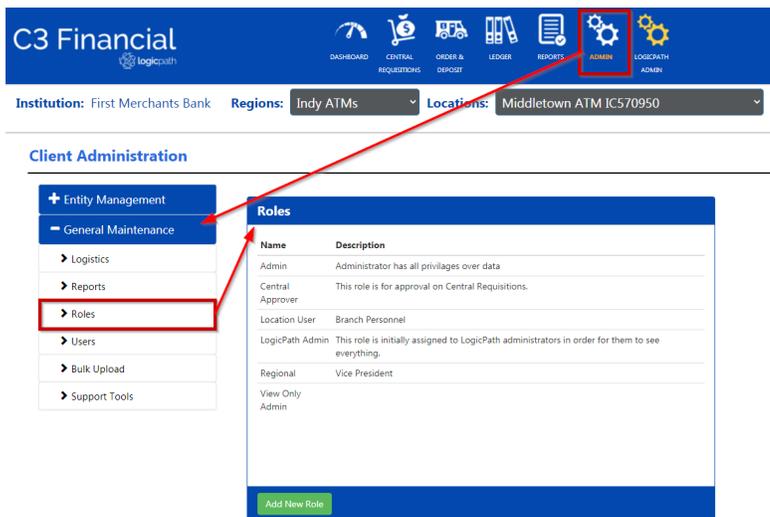
Assign Permissions thru out the application for the Users with this role to view, edit or delete.

Roles – Alerts

If "Alerts" is checked off in the Permissions tab, Alerts will display in the alerts tab, choose which alerts this role will be assigned. Only alerts that are checked off in Alerts Maintenance will display here.

Roles – Reports

If "Reports" is checked off in the Permissions tab, all Reports will display in the Reports tab, choose which alerts this role will be assigned. Only alerts that are checked off in Alerts Maintenance will display here.



Admin Role



Administrator has all privileges over data. The Description of each Tab described in the Overview

Roles	
Name	Description
Admin	Administrator has all privileges over data
Central Approver	This role is for approval on Central Requisitions.
Location User	Branch Personnel
[REDACTED]	[REDACTED]
Regional	Vice President
View Only Admin	

[Add New Role](#)

Admin Details			
DETAILS	PERMISSIONS	ALERTS	REPORTS
Name	<input type="text" value="Admin"/>		
Description	<input type="text" value="Administrator has all privileges over data"/>		
Landing View	<input style="border: none; border-bottom: 1px solid #ccc;" type="text" value="Dashboard Branch Manager"/> ▼		
Save Admin Details		Delete Admin Role	

Central Approver



Central Approver was set to Access the Central Requisitions Tab to Approve orders in Bulk

Roles	
Name	Description
Admin	Administrator has all privileges over data
Central Approver	This role is for approval on Central Requisitions.
Location User	Branch Personnel
Regional	Vice President
View Only	
Admin	

[Add New Role](#)

Central Approver Details			
DETAILS	PERMISSIONS	ALERTS	REPORTS
Name	Central Approver		
Description	This role is for approval on Central Requisitions.		
Landing View	Dashboard Branch Manager		
Save Central Approver Details		Delete Central Approver Role	

Location User



Your Location User is setup to Submit Orders only, and then Fulfill once they are Approved.

Roles	
Name	Description
Admin	Administrator has all privilage over data
Central Approver	This role is for approval on Central Requisitions.
Location User	Branch Personnel
LogicPath Admin	This role is initially assigned to LogicPath administrators in order for them to see everything.
Regional	Vice President
View Only Admin	

[Add New Role](#)

Location User Details

DETAILS

PERMISSIONS

ALERTS

REPORTS

Name

Description

Landing View

Save Location User Details

Delete Location User Role

Regional



Regional were setup with ALL approval rights but not Centrally.

Roles	
Name	Description
Admin	Administrator has all priviligas over data
Central Approver	This role is for approval on Central Requisitions.
Location User	Branch Personnel
LogicPath Admin	This role is initially assigned to LogicPath administrators in order for them to see everything.
Regional	Vice President
View Only	
Admin	

[Add New Role](#)

Regional Details

DETAILS
PERMISSIONS
ALERTS
REPORTS

Name

Description

Landing View ▼

Save Regional Details
Delete Regional Role

View Only Admin



View Only Admin setup to view everything with no Permissions to the Orders/Deposits, and no permissions to make changes to any areas

Roles	
Name	Description
Admin	Administrator has all privileges over data
Central Approver	This role is for approval on Central Requisitions.
Location User	Branch Personnel
LogicPath Admin	This role is initially assigned to LogicPath administrators in order for them to see everything.
Regional	Vice President
View Only Admin	

[Add New Role](#)

View Only Admin Details

DETAILS

PERMISSIONS

ALERTS

REPORTS

Name

Description

Landing View ▼

Save View Only Admin Details

Delete View Only Admin Role

Permissions



The Permissions Tab will allow access to different areas within the application.

Admin Details

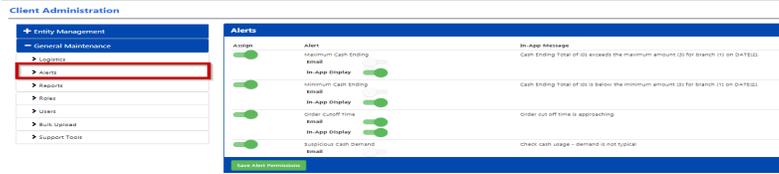
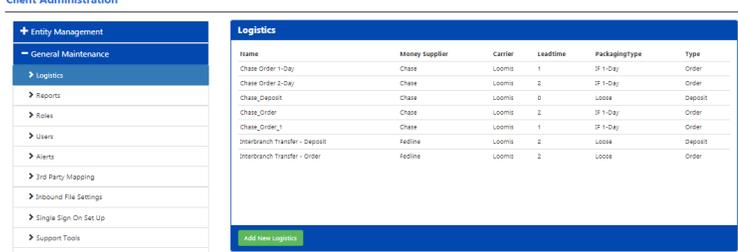
- DETAILS
- PERMISSIONS
- ALERTS
- REPORTS

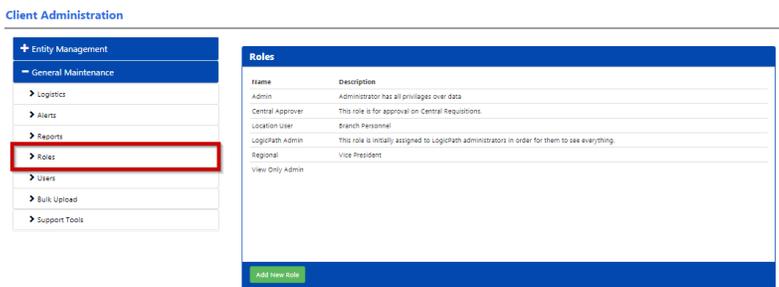
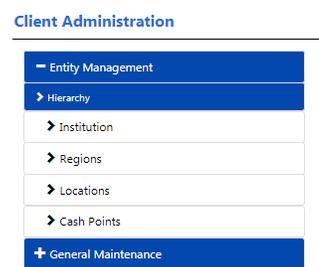
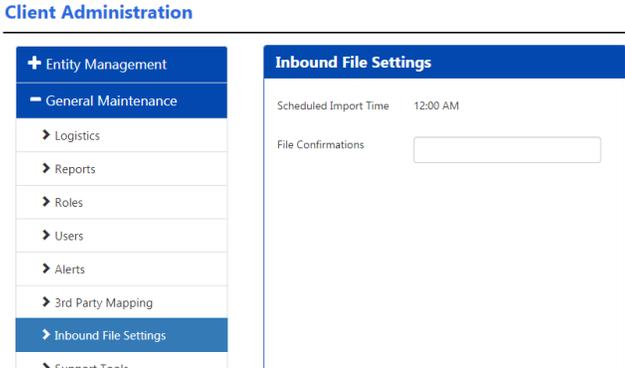
Application View	Permission			Select All Permissions <input type="checkbox"/>
1 Alerts	<input checked="" type="checkbox"/> View			
2 Bulk Action	<input checked="" type="checkbox"/> View			
3 Central Requisitions	<input checked="" type="checkbox"/> Approve <input checked="" type="checkbox"/> Submit	<input checked="" type="checkbox"/> Cancel <input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Fulfill	
4 Client Admin	<input checked="" type="checkbox"/> View			
5 Client Alerts	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> View		
6 Client Logistics	<input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Delete	<input checked="" type="checkbox"/> Edit	
7 Client Reports	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> View		
8 Client Roles	<input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Delete	<input checked="" type="checkbox"/> Edit	
9 Client Users	<input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Delete <input checked="" type="checkbox"/> Password Reset	<input checked="" type="checkbox"/> Edit	
10 Client Whitelist IP	<input checked="" type="checkbox"/> Delete	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> View	
11 Dashboard Branch Manager	<input checked="" type="checkbox"/> View			
12 Entity Management	<input checked="" type="checkbox"/> Activate/Deactivate <input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Edit	
13 Inbound File Settings	<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Edit	
14 Ledger	<input checked="" type="checkbox"/> Delete	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> View	
15 JD-Deposit Workflow	<input checked="" type="checkbox"/> Approve Maximums <input checked="" type="checkbox"/> Cancel-to-Fulfill <input checked="" type="checkbox"/> Fulfill-to-Approve <input checked="" type="checkbox"/> Approve-to-Submit <input checked="" type="checkbox"/> Approve-to-Cancel <input checked="" type="checkbox"/> Submit-to-Fulfill	<input checked="" type="checkbox"/> Cancel-to-Submit <input checked="" type="checkbox"/> Cancel-to-Cancel <input checked="" type="checkbox"/> Fulfill-to-Fulfill <input checked="" type="checkbox"/> Approve-to-Approve <input checked="" type="checkbox"/> Submit New Deposit <input checked="" type="checkbox"/> Submit-to-Cancel	<input checked="" type="checkbox"/> Cancel-to-Approve <input checked="" type="checkbox"/> Fulfill-to-Submit <input checked="" type="checkbox"/> Fulfill-to-Cancel <input checked="" type="checkbox"/> Approve-to-Fulfill <input checked="" type="checkbox"/> Submit-to-Approve	
16 JD-Order Workflow	<input checked="" type="checkbox"/> Approve Maximums <input checked="" type="checkbox"/> Cancel-to-Fulfill <input checked="" type="checkbox"/> Fulfill-to-Approve <input checked="" type="checkbox"/> Approve-to-Submit <input checked="" type="checkbox"/> Approve-to-Cancel <input checked="" type="checkbox"/> Submit-to-Fulfill	<input checked="" type="checkbox"/> Cancel-to-Submit <input checked="" type="checkbox"/> Cancel-to-Cancel <input checked="" type="checkbox"/> Fulfill-to-Fulfill <input checked="" type="checkbox"/> Approve-to-Approve <input checked="" type="checkbox"/> Submit New Order <input checked="" type="checkbox"/> Submit-to-Cancel	<input checked="" type="checkbox"/> Cancel-to-Approve <input checked="" type="checkbox"/> Fulfill-to-Submit <input checked="" type="checkbox"/> Fulfill-to-Cancel <input checked="" type="checkbox"/> Approve-to-Fulfill <input checked="" type="checkbox"/> Submit-to-Approve	
17 Orders/Deposits	<input checked="" type="checkbox"/> View			
18 Password Configuration	<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Edit		
19 Reports	<input checked="" type="checkbox"/> View			
20 SSO Config	<input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Delete	<input checked="" type="checkbox"/> Edit	
21 Support Tools	<input checked="" type="checkbox"/> View			
22 Third Party Mapping	<input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Delete	

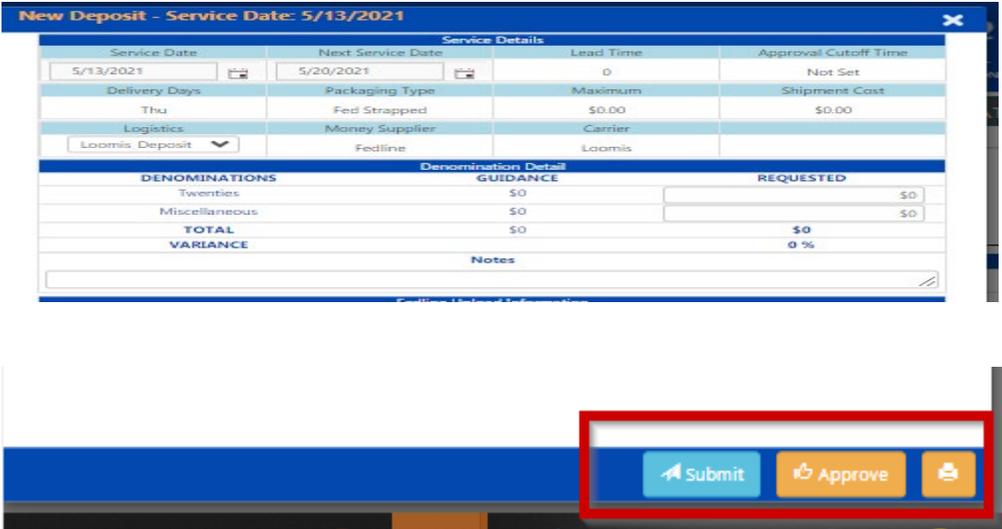
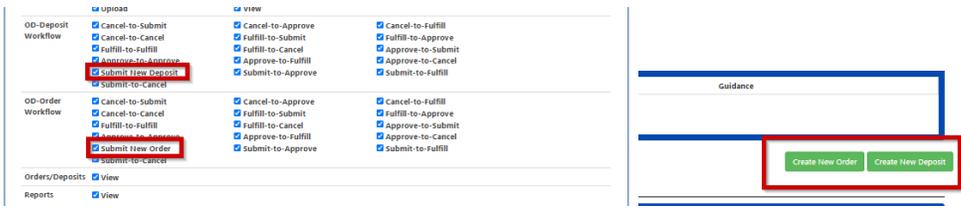
Save Role Permissions

Step Action

Result

<p>1</p>	<p>Alerts: Allows the Alerts Icon to display in the Tool Bar</p>	
<p>2</p>	<p>Bulk Actions: Allows access to upload in bulk found under Admin Icon</p>	
<p>3</p>	<p>Central Requisitions - (displays Icon for access to Central Req, Permission assigned in Role</p>	
<p>4</p>	<p>Client Admin (View) Displays Admin Icon in Tool Bar</p>	
<p>The Following 4-9 Must have Client Admin Checked to get into this area.</p>		
<p>5</p>	<p>Client Alerts Allows access to General Maintenance Alerts. Edit: allows permission to turn on and off alerts,</p>	
<p>6</p>	<p>Client Logistics (add, edit, view)</p>	
<p>7</p>	<p>Reports Library (Edit which reports to assign) to be used</p>	

	<p>Reports View: Displays the Reports Icon on the Tool Bar</p>	
<p>8</p>	<p>Client Roles: Add, Edit View or delete roles</p>	
<p>9</p>	<p>User: Add, Edit View or delete Users</p>	
<p>10</p>	<p>Client Whitelist IP</p>	
<p>11</p>	<p>Dashboard Branch Manager: Will display the Branch Dashboard Icon in the Tool Bar</p>	
<p>12</p>	<p>Entity Management: Permissions to the entire Hierarchy</p>	
<p>13</p>	<p>Inbound File Setting Access to Map or Ignore Branches, Denominations or Cash Points.</p>	
<p>14</p>	<p>Ledger: Displays the Ledger Icon in tool bar. Permissions to make manual</p>	

	<p>changes thru the back end</p>	
<p>15</p>	<p>Deposit Workflow: Permission buttons will display from Permissions checked</p>	
<p>16</p>	<p>Order Workflow</p>	<p>Same as 13 but for Orders.</p>
<p>17</p>	<p>Submit New Order/Deposit: Need this checked or the Create New Order and Deposit Icon goes away</p>	
<p>17</p>	<p>Orders/Deposit View: Displays the Icon in Tool Bar to Access Orders/Deposit screen</p>	
<p>18</p>	<p>Password Configuration</p>	<p>Will Display the Password field in th User Maintenance. Must also have 9 User permissions.</p>
<p>19</p>	<p>Reports View: Displays Reports Icon in Tool Bar allowing to view reports assigned to their role.</p>	
<p>20</p>	<p>SSO Configuration Allows access to configure Single Sign on</p>	