LogicPath Roles Description

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| Diagram Error! Bookmark not defir | ied. |

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

- o Name: Role Name
- Description: Description of Role
- o 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 privilages over data |
| entral pprover | This role is for approval on Central Requisit |
| cation User | Branch Personnel |
| | |
| gional | Vice President |
| w Only | |
| | |
| | |
| | |
| | |
| ld New Role | |

Central Approver



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

| oles | |
|-----------|--|
| ame | Description |
| .dmin | Administrator has all privilages over data |
| ıl ver | This role is for approval on Central Requisitions. |
| i User | Branch Personnel |
| | |
| inal | Vice President |
| Only n | |
| | |
| New Role | |

Location User



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

| Roles | | Location User Details | | | | | | |
|---------------------|---|------------------------------|----------|---------------|------------------|--------|---------|--|
| Name | Description | | DETAILS | PERMISS | IONS | ALERTS | REPORTS | |
| Admin | Administrator has all privilages over data | | | | | | | |
| Central Approver | This role is for approval on Central Requisitions. | Name Location User | | | | | | |
| Location User | Branch Personnel | | Der | cription | | | | |
| LogicPath Admin | This role is initially assigned to LogicPath administrators in order for them to see everything. | | De | in priori | Branch Personnel | | | |
| Regional | Vice President | Landing View Orders/Deposits | | | | | | |
| View Only Admin | | | Save Loo | cation User D | etails | | | |
| | | | | | | | | |
| | | | | | | | | |
| Add New Role | | | | | | | | |

Regional



Regional were setup with ALL approval rights but not Centrally.

| Roles | | Regi | ona | l Details | | | | | | |
|---------------------|---|--------------|--------|--------------------------|--------|--------|---------|---|---------------|---------|
| Name | Description | DETA | LS | PERMISS | IONS | ALERTS | REPORTS | | | |
| Admin | Administrator has all privilages over data | | | | | | | | | |
| Central Approver | This role is for approval on Central Requisitions. | | | Name | Region | nal | | | | |
| Location User | Branch Personnel | | | | | | | | | |
| LogicPath Admin | This role is initially assigned to LogicPath administrators in order for them to see everything. | Description | | Vice President | | | | | | |
| Regional | Vice President | Landing View | | Dashboard Branch Manager | | | | ~ | | |
| View Only Admin | | Sa | ve Reç | gional Details | 5 | | | | Delete Region | al Role |
| Add New 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 | | View O | n <mark>ly Adm</mark> i | n Details | | | | | |
|---------------------|---|-------------|-------------------------|-------------------|----------|---------|----|---------------|---------|
| Name | Description | DETAILS | PERMIS | SIONS ALE | RTS | REPORTS | | | |
| Admin | Administrator has all privilages over data | | | | | | | | |
| Central Approver | This role is for approval on Central Requisitions. | | Name | View Only A | Admin | | | | |
| Location User | Branch Personnel | Da | | | | | | | |
| LogicPath Admin | This role is initially assigned to LogicPath administrators in order for them to see everything. | Description | | Enter Description | | | | | |
| Regional | Vice President | Land | ling View | Dashboard | Branch M | Manager | | | |
| View Only Admin | | Save Vi | ew Only Adm | in Details | | | De | lete View Onl | y Admin |
| | | | | | | | | | |

Permissions



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

| 4 | dmin Details | | | | | | |
|----------|---|---|---|---------|--|--|------------------------|
| 1 | DETAILS PERMI | ISSIONS | ALERTS | REPORTS | | | |
| | | | | | | | |
| | Application View | Permissio | n | | | | Select All Permissions |
| 1 | Alerts | 🗹 View | | | | | |
| 2 | Bulk Action | 🗹 View | | | | | |
| 3 | Central Requisitions | Approv Submit | ve t | | ✓ Cancel ✓ View | Z Fulfill | |
| 4 | Client Admin | View | | | | | |
| 5 | Client Alerts | 🗹 Edit | | | ✓ View | | |
| 6 | Client Logistics | ✓ Add ✓ View | | | Z Delete | Z Edit | |
| 7 | Client Reports | 🗹 Edit | | | ✓ View | | |
| 8 | Client Roles | ☑ Add ☑ View | | | Z Delete | Z Edit | |
| g | Client Users | ✓ Add ✓ View | | | ✓ Delete ✓ Password Reset | Z Edit | |
| 1(| Client Whitelist IP | Delete | | | Edit | View | |
| 11 | Dashboard Branch Manager | 🗹 View | | | | | |
| 1: | 2 ntity Management | ✓ Activat ✓ View | te/Deactivate | | Add 2 | 🖬 Edit | |
| 13 | Settings | 🗹 View | | | Z Add | 🖬 Edit | |
| 14 | Ledger | 🗹 Delete | | | Z Edit | ✓ View | |
| 15 |) D-Deposit Workflow | Approv Cancel Fulfill-1 Approv Approv Submit | ve Maximum -to-Fulfill to-Approve ve-to-Submit ve-to-Cancel t-to-Fulfill | 2 | Cancel-to-Submit Cancel-to-Cancel Fulfill-to-Fulfill Approve-to-Approve Submit New Deposit Submit-to-Cancel | Cancel-to-Approve Fulfill-to-Submit Fulfill-to-Cancel Approve-to-Fulfill Submit-to-Approve | |
| 1 | 6 vorkflow | Approv Cancel Fulfill-1 Approv Approv Submit | ve Maximum -to-Fulfill to-Approve ve-to-Submit ve-to-Cancel t-to-Fulfill | 5 | Cancel-to-Submit Cancel-to-Cancel Fulfill-to-Fulfill Approve-to-Approve Submit New Order Submit-to-Cancel | Cancel-to-Approve Fulfill-to-Submit Fulfill-to-Cancel Approve-to-Fulfill Submit-to-Approve | |
| 17 | 7 Orders/Deposits | 🗹 View | | | | | |
| 1: | 8 [°] assword ∴onfiguration | 🗹 View | | | ☑ Edit | | |
| 1 | g teports | 🗹 View | | | | | |
| 2 | sso config | ✓ Add ✓ View | | | ✓ Delete | Z Edit | |
| 21 | Support Tools | 🗹 View | | | | | |
| 2 | Third Party | 🗹 Add | | | ✓ View | Delete | |
| <u> </u> | Mapping | 🗹 Edit | | | | | |
| | Save Role Permiss | ions | | | | | |

Step Action

LogicPath Role Description

| 1 | Alerts: Allows the Alerts Icon to display in the Tool Bar | DASHEDARID REVERTAL DEFECT LIDGER ALLERES ALLE |
|---|--|--|
| 2 | Bulk Actions: Allows access to upload in bulk found under Admin Icon | Subject Subject Ingels Index Andreament Ingels Ingels Ingels |
| 3 | Central Requisitions - (displays Icon for access to Central Req, Permission assigned in Role | DASHBOARD DASHBOARD REQLISTION: REQLISTION: DEPOSIT DEPOSIT DEPOSIT DEPOSIT DEPOSIT |
| 4 | Client Admin (View) Displays Admin Icon in Tool Bar | |
| | The Following 4-9 Must have Client Admin Checked to get into this area. | |
| 5 | Client Alerts Allows access to General Maintenance Alerts. Edit: allows permission to turn on and off alerts, | |
| 6 | Client Logistics (add, edit, view) | Second Ministration Crient Administration Indext Indext Second Ministrator Indext Second Ministrator Indext Second Ministrator Network Indext Second Ministrator </th |
| 7 | Reports Library (Edit which reports to assign) to be used | Cleat Administration I vip Manguani |

LogicPath Role Description

| | Reports View: Displays the Reports Icon on the Tool Bar | DAG-HBOARD DAG-HBOARD REQUESTIONS REQUESTIONS CEPOSIT |
|----|--|---|
| 8 | Client Roles: Add, Edit View or delete roles | Second |
| 9 | User: Add, Edit View or delete Users | Select Administration |
| 10 | Client Whitelist IP | |
| 11 | Dashboard Branch Manager: Will display the Branch Dashboard Icon in the Tool Bar | DASHBOARD LORDER & LEDGER LEDGER LEDGER LEDGER LEDGER LEDGER LEDGER LEDGER LEDGER LEDGER LEDGER LEDGER LEDGER |
| 12 | Entity Management: Permissions to the entire Hierarchy | Client Administration - Entity Management > Hierarchy > Institution > Regions > Locations > Cash Points + General Maintenance |
| 13 | Inbound File Setting Access to Map or Ignore Branches, Denominations or Cash Points. | Client Administration + Entity Management - General Maintenance > Logistics > Reports > Roles > Users > Alerts > 3rd Party Mapping > Inbound File Settings |
| 14 | Ledger: Displays the Ledger Icon in tool bar. Permissions to make manual | DASHBOARD CENTRAL CENTRAL CENTRAL CENTRAL LEGER LEGER LEGER ALERTS REPORTS ADMEN LOGIC/ATH ADMEN |

LogicPath Role Description

| | changes thru the back end | |
|----|---|--|
| 15 | Deposit Workflow: Permission buttons will display from Permissions checked | New Deposit - Service Date: 5/13/2021 Service Date: Next Service Date Service Date Lead Time Approval Cutoff Time S/13/2021 O Not Set Service Date Lead Time Approval Cutoff Time S/13/2021 O Not Set Service Date Colspan="2">O Not Set Delivery Days Packaging Type Maximum Shipment Cost Delivery Days Packaging Type Maximum Shipment Cost Denomination Detail Shipment Cost Denomination Detail Butomination Detail Denomination Detail Shipment Cost Miscellaneous Shipment Cost Denomination Detail Butomination Detail Miscellaneous Shipment Cost Miscellaneous Shipment Cost Miscellaneous Shipment Cost |
| | | Approve |
| 16 | Order Workflow | Same as 13 but for Orders. |
| | Submit New Order/Deposit: Need this checked or the Create New Order and Deposit Icon goes away | u upiosit M view OD-Opepoidi Workflow C Cancel-to-Submit C Cancel-to-Cancel B datationary Concel B datatio |
| 17 | Orders/Deposit View: Displays the Icon in Tool Bar to Access Orders/Deposit screen | DASHBOARD CENTRAL REQUISITIONS CIPOTAL REQUISITIONS CIPOTAL |
| 18 | Password Configuration | Will Display the Password field in th User Maintenance. Must also have 9 User permissions. |
| 19 | Reports View: Displays Reports Icon in Tool Bar allowing to view reports assigned to their role. | DASHEDARD CENTRAL ORDER & LEDGER ALERTS REPORTS ADMIN LOGEDATH REQUISITIONS DEPOSIT |
| 20 | SSO Configuration Allows access to configure Single Sign on | Client Administration - General Maintenance > Roles > Users > Single Sign On Set Up > Support Tools > Bulk Action > Client Whitelist IP |