



# logicpath

## C3 Financial Role Maintenance

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## Managing Roles

Roles define what users can and cannot do and what users can view. In order to log into the C3 Financial, a user must have a role. The first step to managing users is to understand the roles.

### Roles

There are three primary roles used in the C3 Financial application: Administrator (A), Vice-President (VP), and Branch Manager (BM). While most features will be usable by all roles, there are some features that are limited based upon the role. Care needs to be taken when assigning roles to ensure that users have access to the appropriate areas in C3 Financial and are restricted from areas they are not permitted to view.

Role	Institution Set-up	Manage Users	Manage Roles	Data Entry	ReqCurrency	Branch Reports	Branch Charts	Management Reports	Upload Function
Administrator	X	X	X	X	X	X	X	X	X
Vice-President	V			X	X	X	X	X	X
Branch Manager				X	X	X	X		

C3 Financial allows for unlimited number of roles. Roles are controlled by the Administrator and can be added, edited and deleted.

### Administrator (A)

The Administrator is an individual within the institution who oversees the maintenance of operational features such as institution, region and branch parameters. This role is also responsible for the maintenance of users and appropriate role delegation. The Administrator has full access to C3 Financial and can view, edit and delete all data in the application. This person should be someone who understands the structure of the financial institution and the levels of access that each user should be granted.

- ★ Assign at least two Administrators' to an institution
- ★ During the implementation period, you can assign roles to users based on their role within the Financial Institution.

### Vice-President (VP)

The Vice-President is a person, or group of persons, in the institution who oversees the Branches or Region(s). The VP has access to global reports and the Upload Functionality. This role has the same capabilities as the Administrator, but cannot add, edit, delete or view the Institution parameters, Users, or Roles.

### Branch Manager (BM)

The Branch Manager is the individual responsible for the management of cash at the Branch. This role has access to branch charts and reports, but does not have access to Institution and Region information, Users, Roles, global reports or the upload functionality.

Role	Institution Set-up	Manage Users	Manage Roles	Data Entry	ReqCurrency	Branch Reports	Branch Charts	Management Reports	Upload Function
Administrator	X	X	X	X	X	X	X	X	X
Vice-President	V			X	X	X	X	X	X
Branch				X	X	X	X		

## Accessing the Role Management Screen

At the top of the Branch Dashboard click the Roles tab in the center of the administration menu bar. From this screen you are able to add, edit and delete Roles.



## Adding Roles

Click "New" on the bottom of the screen to create a new role.



Creating new roles offers limitless access levels in C3 Financial.

The following fields are required:

1. Ref Name: This field is the abbreviation for the role and will appear on the User management screen when selecting a Role for a User. (BM)
2. Name: This is the full name of the Role. (Branch Manager)
3. Start Page: This sets the first page a User will see after logging in when associated with this Role.

After the appropriate fields are populated click the "Save" button, at the bottom of the page.



## Assigning Permissions

After a new Role is created click the "Permissions" button to open the Roles Permission screen. Check the appropriate actions for the role to perform and features for the role to view. Click the "Save" button to save the Permissions for this Role.

Save Close				
Activity	<input checked="" type="checkbox"/>	view		
Activity Upload	<input type="checkbox"/>	view		
Advanced Reports	<input type="checkbox"/>	Institution Cash	<input type="checkbox"/>	Branch
		<input type="checkbox"/>	Institution Requisition	<input type="checkbox"/>
		<input type="checkbox"/>	Executive Dashboards	<input type="checkbox"/>
Public				
Branches	<input checked="" type="checkbox"/>	view	<input type="checkbox"/>	save
			<input type="checkbox"/>	delete
Central Requisitions	<input type="checkbox"/>	View		
Global Reports	<input checked="" type="checkbox"/>	view		
Institution	<input checked="" type="checkbox"/>	view	<input type="checkbox"/>	save
			<input type="checkbox"/>	delete
Ledger Entry	<input type="checkbox"/>	View		
Manage Roles	<input type="checkbox"/>	view	<input type="checkbox"/>	save
			<input type="checkbox"/>	delete
Manage Users	<input type="checkbox"/>	view	<input type="checkbox"/>	save
			<input type="checkbox"/>	delete
Order Workflow - Approve	<input checked="" type="checkbox"/>	Approve To Approve	<input checked="" type="checkbox"/>	Approve To Submit
		<input checked="" type="checkbox"/>	Approve To Cancel	<input checked="" type="checkbox"/>
		<input checked="" type="checkbox"/>	Approve To Fulfill	
Order Workflow - Cancel	<input checked="" type="checkbox"/>	Cancel To Cancel	<input checked="" type="checkbox"/>	Cancel To Submit
		<input checked="" type="checkbox"/>	Cancel To Approve	<input checked="" type="checkbox"/>
		<input checked="" type="checkbox"/>	Cancel To Fulfill	
Order Workflow - Fulfill	<input checked="" type="checkbox"/>	Fulfill To Fulfill	<input checked="" type="checkbox"/>	Fulfill To Submit
		<input checked="" type="checkbox"/>	Fulfill To Approve	<input checked="" type="checkbox"/>
		<input checked="" type="checkbox"/>	Fulfill To Cancel	
Order Workflow - Submit	<input checked="" type="checkbox"/>	Submit To Submit	<input checked="" type="checkbox"/>	Submit To Approve
		<input checked="" type="checkbox"/>	Submit To Fulfill	<input checked="" type="checkbox"/>
		<input checked="" type="checkbox"/>	Submit To Cancel	
Regions	<input checked="" type="checkbox"/>	view	<input type="checkbox"/>	save
			<input type="checkbox"/>	delete

## Editing Roles

After editing the appropriate fields click the "Save" button at the top of the page.

### Deleting Roles

If a Role no longer exists, it can be deleted. A deleted Role cannot be retrieved without technical support. Deleting should be done with great care. To delete a role select the role and click the "Delete" button at the bottom of the screen. This will display a warning message asking if you are sure you want to delete, click "OK" to delete or "Cancel" to cancel the delete.

