

System Roles

Instead of setting the System Access & User preferences of each individual User, System Roles let you create different Roles with different permissions and preferences to apply to Users all at once.

System Roles mean you can update the Access & Actions for an entire group of Users at once, instead of one-by-one. This will also mean a lot of time saved when creating new Users.

Best Use Example

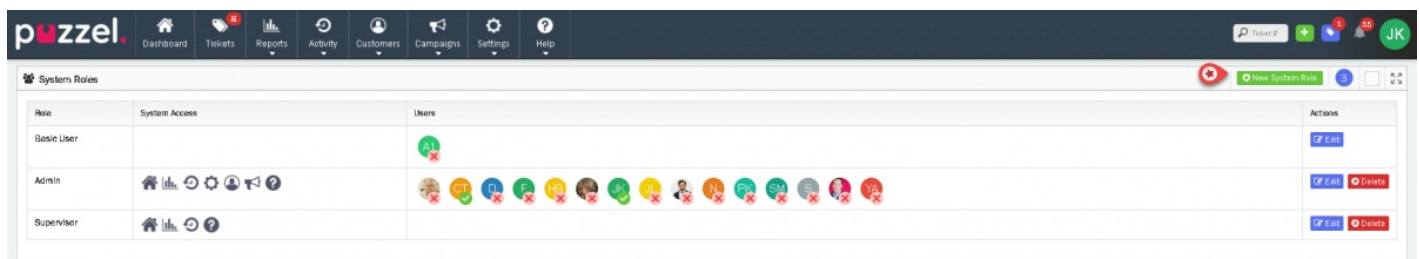
Each of your Teams are made up of 3 levels of Users:

1. **The Basic Users** – Has limited access and permissions. Works through the tickets that are assigned to them.
2. **The Supervisor** – Supports the Basic Users, able to reassign tickets and other more advanced actions as necessary. Can also report on their Teams.
3. **Admin** – Can change the Team & User settings and options as necessary. Can create New Ticket Rules to ensure tickets are received and assigned correctly.

You can now create a System Role to suit how your Teams operate and work together, and assign several Users to each System Role.

How to create new System Roles

Go to: Settings -> General-> Permissions-> System Roles



Three System Roles are available by Default:

1. **Basic User** : They have the most limited access and permissions available, only able to collect tickets from all their teams and view tickets currently assigned to them. This System Role cannot be deleted. Like the “All Users” Team, this SystemRole ensures there is always an existing System Role in your Logicalwareaccount.
2. **Supervisor**: They have the right to view all tickets in their own teams and have access to the Dashboard, Reports & Activity Log by default.
3. **Admin** : They have every available access & permissions. Admin Users can view all tickets and have access to the Dashboard, Reports, Activity Log, Settings. They can also change User settings and options and are able to define new Ticket rules.

Note

You can create as many new System Roles as you like, and edit the existing default System Roles too.

To create a new System Role:

1. Click the green **New System Role** button on the top right.
2. Give the System Role a new name.

3. (optional) Add the Users for this System Role (this can be done later.)
4. Choose the available Ticket Actions.
5. Choose the available Ticket Access.
6. Choose the available System Access.
7. Save.

The same steps can be followed to edit an existing System Role, simply click the “Edit” button to the right of the System Role you wish to change.

Click the “Delete” button to remove a System Role. Before you can delete a System Role, all Users currently assigned to it must be reassigned to a different System Role.

Note

You cannot delete a System Role that is still assigned to a User.

Instead of setting the system access and user preferences for each individual user, System Roles let you create different Roles with varying permissions to update the access and actions for a group of users. This gives better control over access rights and is more efficient to setup.

Property	Description
Ticket Actions	
Can choose team when collecting ticket	Allows user to collect ticket from different teams from Collect button in top right corner
Can bulk update tickets	Bulk update is when multiple tickets are updating in one action, by selecting tickets on Tickets page and then clicking on Bulk Update. This setting allows Users the permission to have access
Can blacklist a ticket source	Allows User to add a ticket source to the system Blacklist
Can reassign any ticket	Allows User to reassign a ticket to a different User. This will be visible in the Ticket timeline
Can delete tickets	Allows User to delete tickets. Please not once tickets are deleting they cannot be recovered
System Access	

Property	Description
Dashboard	Turns ON Dashboard access for System Role
Reports	Turns ON Reports access for System Role
Activity Log	Turns ON Activity Log access for System Role
Settings	Turns ON Settings access for System Role
Customer Access	
View Customers	When ON can view Customers active records, attributes, all tickets against that customer and audit trail
Edit Customers	When ON can edit Customers
Delete Customers	When ON can delete Customers
Campaign Access	
View Campaigns	When ON can view SMS and email Campaigns
Edit Own Campaigns	When ON can edit own SMS and email Campaigns
Edit All Campaigns	When ON can edit all Campaigns
Delete Campaigns	When ON can delete Campaigns