Working with Security Roles in CCC ONE®

Introduction

The job aids within this document describe how to create and work with Security Roles in CCC ONE®.

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Locate Security Roles in CCC ONE®

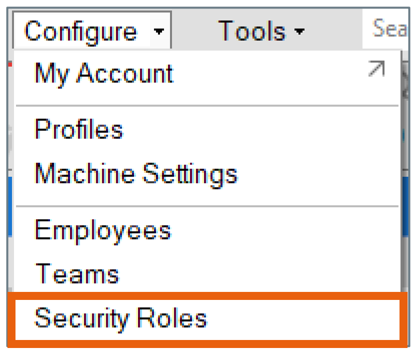
Introduction

This document reviews how to locate the Security Roles screen in CCC ONE®.

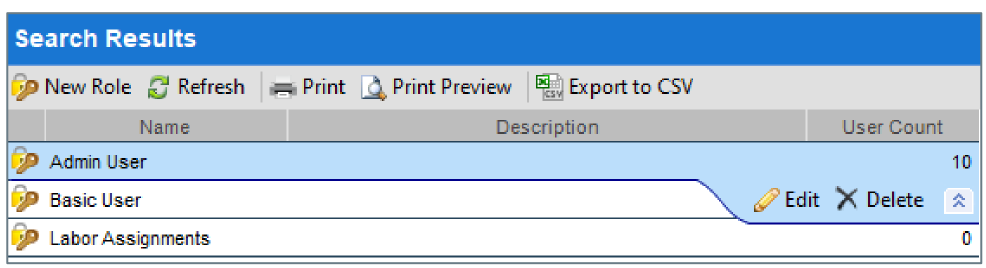
Procedure

Use the following steps to locate the Security Roles screen:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Go to the Configure Menu and select Security Roles.



Note: Options listed may differ based on modules purchased and access rights.</td></tr>
<tr><td>2</td><td>The Security Roles window opens. Add new Roles or edit existing roles. Admin User, Basic User, and Labor Assignments are the default roles provided.</td></tr>
<tr><td colspan="2">



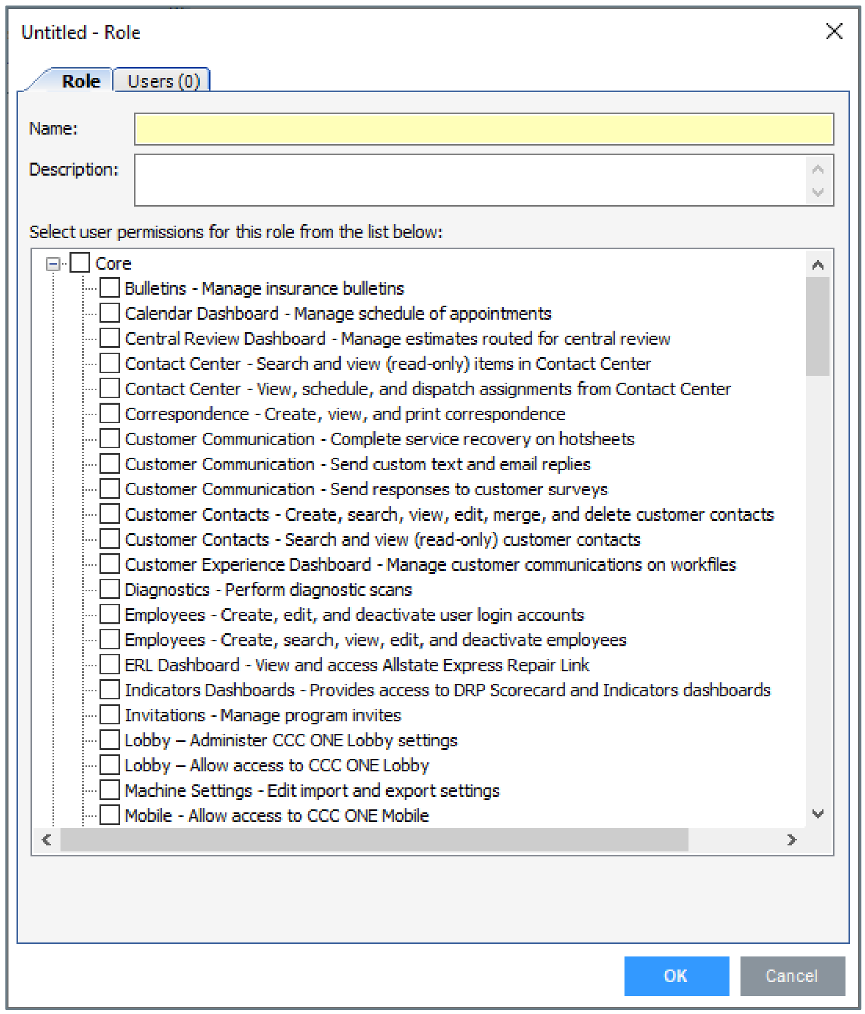
</td></tr>
<tr><td>3</td><td>Click on New Role on the toolbar or click on Edit in an existing role to continue.</td></tr>
</table>

Continued on next page

Procedure
(continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>
The New Role (or existing Role) window opens.

The window defaults to the Role tab. This tab is reviewed in the next section of this job aid.



Note: If you had opened an existing **Role**, the current permissions selected for that role would display.
</td></tr>
</table>

Using the Role Tab

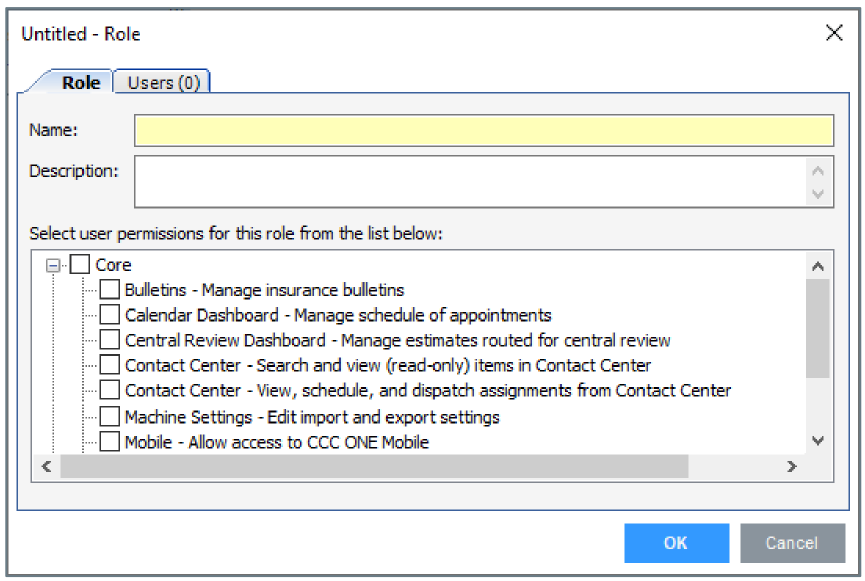
Introduction

This job aid reviews the steps necessary to complete or update the Role tab.

Procedure

To create a New Role (or edit an existing Role), information is entered on two tabs (Roles and Users). This table reviews the information needed to complete the Roles tab.

Note: The examples are based on creating a **New** role, but you will use the same procedure to edit an existing role.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Enter the Name for the new Security Role into this tab.


The following fields can be completed by entering information in a text box or using the check boxes to select options:
• Name
• Description
• User Permissions: Use the plus/minus links to maximize or minimize Permissions Groups. Use the check boxes to select specific Permissions within each Group.
Note: Required Fields are indicated by a yellow background.</td></tr>
<tr><td>2</td><td>Enter a Description if needed.</td></tr>
</table>

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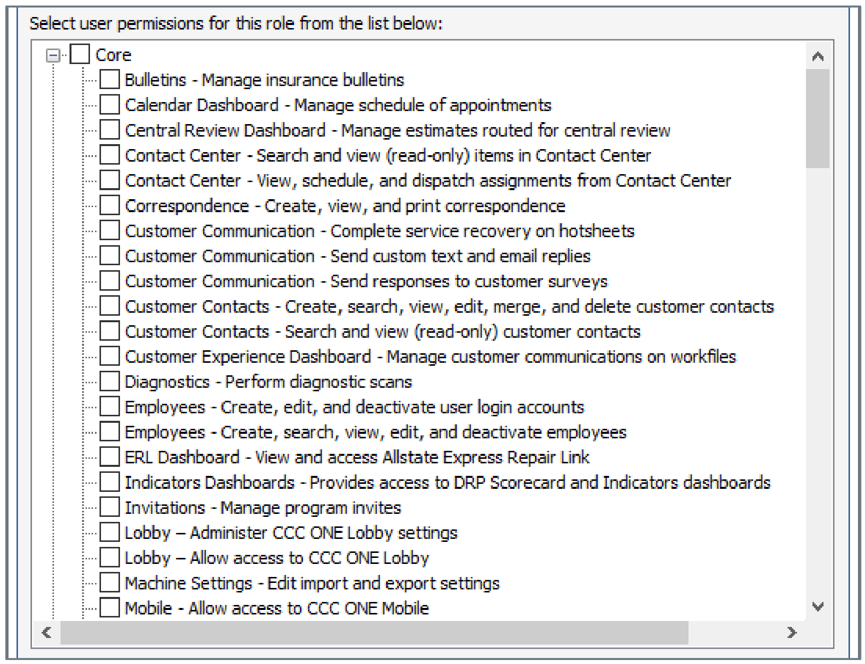
Procedure
(continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Use the menu to select Permissions for this new Security Role or Update existing Permissions.


A. Selecting the checkbox by a Permission Group Name selects all the permissions under that Group.
B. Use the individual checkboxes to select specific permissions under each Group as needed.</td></tr>
<tr><td>4</td><td>When you have completed this tab, click the User tab to continue.</td></tr>
</table>

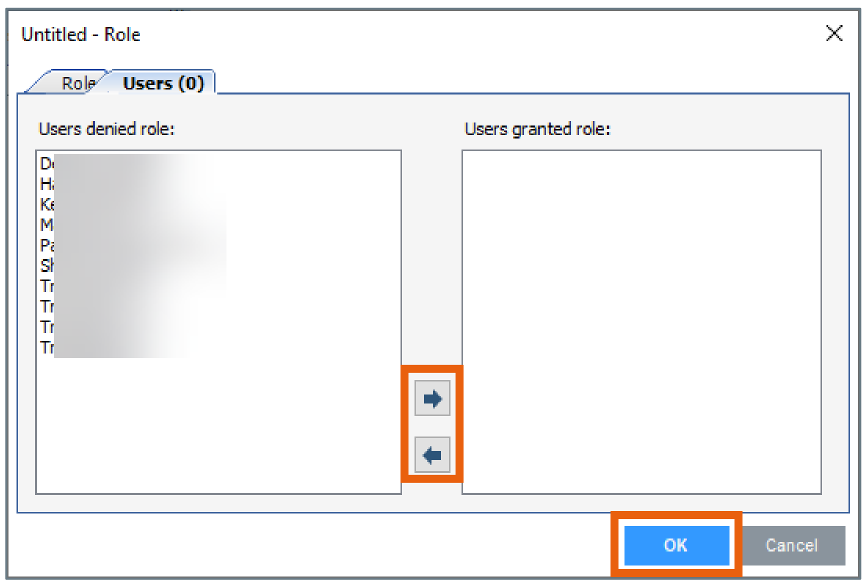
Working with the Users Tab

Introduction

This job aid reviews the steps necessary to complete or update the Users tab.

Procedure

Once the Role has been created or update, you must identify the Users that are allowed to have this Security Role:

Step	Action
1	The system displays all the users on the system in the **Users denied role** column. Use the arrow keys to move users to the **Users granted role** column. 
2	Once you have entered all of the information required on both tabs, click the **OK** button at the bottom of the dialogue box to add (or update) the **Security Role**.

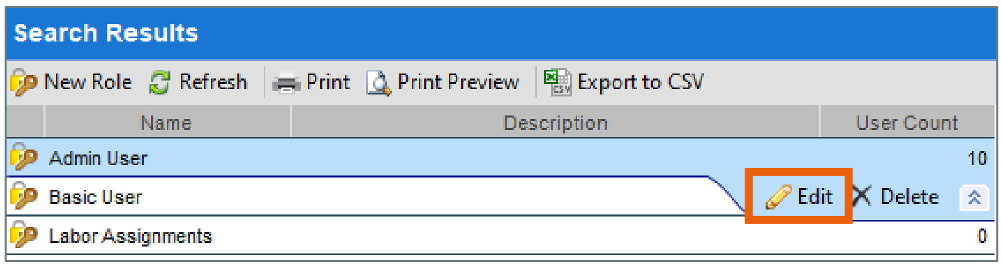
More About Existing Security Roles

Introduction

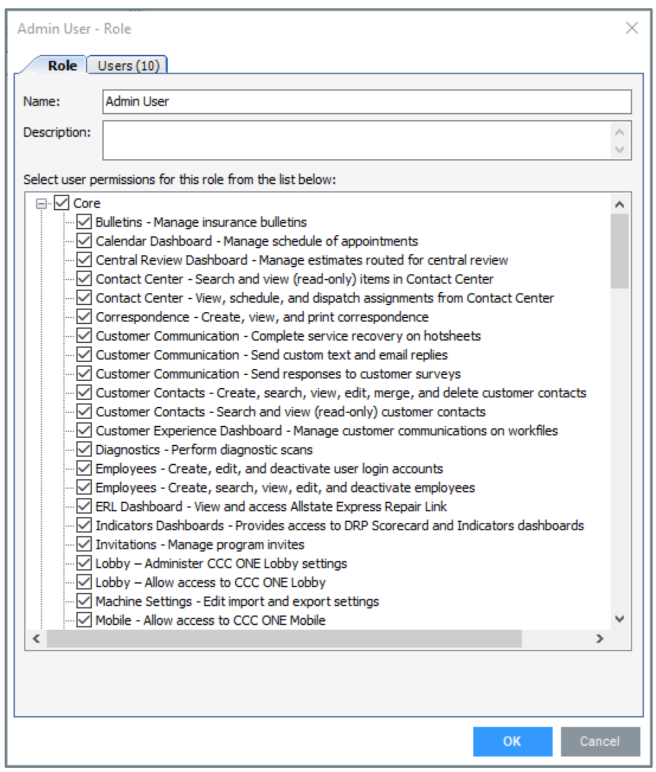
This job aid provides additional information on working with Security Roles.

Edit Security Roles

The Admin, Basic, and Labor Assignments Security Roles are the default roles provided with CCC ONE®. The Search Panel displays all existing Security Roles.



Once created, highlight the Security Role to change and then use the Edit link to change the permissions or users associated with the Role.



Delete Role

To delete a **Security Role**, highlight it and click the **Delete** link.