



TIP OF
THE
MONTH



PERMISSIONS AND ROLES

Permissions and Roles

Permissions are the ability to perform functions within the application, including viewing, modifying, adding information and allowing or restricting which types of information a User can interact with. An example of this would be restricting access to view Items in a particular Item Class. There are hundreds of possible variations of permissions, and they can be allocated to specific Users and Roles.

Operation Permissions relate to core functions within Formpak, for example, Add a New Raw Material or Modify a Formulation. These permissions are set up into Roles which are added to your software on installation of Formpak. Occasionally we add new Operation Permissions which could be relevant to an existing Role. However, we would never update an existing customer's Role permissions. System updates may include updated functionality within the application, and therefore requires corresponding permissions as these are not automatically revised with the application update. Therefore, you may want to review your current Roles and update with any relevant Operation Permissions.

There are also additional permissions on Raw Materials and Formulations Item class, Entity Properties, Events, Projects, Scopes, Parties and Documents which are always added by your company and not Formpak.

Raw Material and **Formulation** permissions interact with Operation Permissions, defining the item classes to which the operation permissions relate.

Entity Properties These permissions further specify what kind of information can be seen for the Raw Materials and Formulations, for example, by removing or allocating the ability to see Cost, Properties, Composition, Customers or Suppliers. In this way a User with permission to View a Raw Material may be able to see the Properties but not the Cost or Suppliers.

Events permissions show which events the User is subscribed to.

Projects permissions show which project templates the User is allowed to interact with.

Scopes permissions show which integrated system Users can interact with.

Parties permissions show which Party Class, for example, Customer, Supplier and TO Users can interact with.

Document permissions are handled differently to the permissions above. They are controlled in the Document Type and allow you to control who can print a document and under what circumstances. For more information see the [Documents Overview](#).

To add Operation Permissions to a Role navigate to 'Manage a Role's Permissions on Operations'. Select Search and a list of Roles will appear.

Please select the role whose permissions on operations will be managed.

Search for Role

Operation:

Show Enabled Operations Only

Operation Type Standard Service

License Level A B C N/A

Role Name	License Level	Description
Certification Administrator	B	All the permissions required to add, organise and modify Certifications, including ability to view raw materials and formulations. It does not include ability to view compositions or view Certified Sources for the Composition of an Item.
Document Administrator	A	High level access to produce, modify and manage documents, the circumstances under which they are supplied and to whom.
Document Producer	C	Ability to print a document and view other information including raw materials and formulations (but not compositions).
Formulation Administrator	A	Higher level of access than Formulation Composition Developer. In addition to adding and modifying formulations, can perform global replacements of items. Check in User's pending changes, can add new cross references.
Formulation Composition Developer	A	Can develop and modify formulations and interact with jobs in a way appropriate to a developer. The Role can interact with formulation classes as specified by the Formulation Permissions.
Job Administrator	B	Role can add, modify, review and manage jobs. Role can add customers and applications. They can view other information which relates to items, but cannot see compositions.
Party Administrator	B	Can add and modify customers, suppliers and party groups, but not TO's. Can manage cross references and print documents required.
Performer	A	Create and modify formulations by item class
Product Administrator	A	Permissions are similar to Product Evaluator with additions of ability to add, modify and organise classifications and applications. Role can also add new properties and view other information in the application.
Product Evaluator	B	Role can view and modify RM and / or Formulation details, including classifying items. They cannot view compositions. They can review development jobs and assign new cross references to Items and view other information.
Project Administrator	A	Permissions for project administration: to set up and modify project templates, task types, project properties, event notifications and Project Code Sequences. Additionally has Project User operation permissions.
Project User	C	Access to add, modify and view projects. Interacts with Permissions on Projects. Also includes permissions to view, modify and action tasks.
Raw Material Administrator	A	Higher level of access than Raw Material Developer. In addition to adding and modifying raw materials, can remove raw material compositions and perform global replacements of items. Undo User's pending changes, can add new cross references.
Raw Material Developer	A	Can add and modify raw materials and their compositions. Can interact with Jobs in a way appropriate to product developers. The Role can interact with raw material classes as specified by the Raw Material Permissions.
Regulatory Role	A	Can produce and manage regulatory and technical documents. Can view raw materials, formulations and their compositions.
System Administrator	A	A user who can add, modify and manage Users, Roles and Permissions. They can view many system functions and undertake some system set up. They cannot produce documents or see compositions.
System Communication Administrator	A	A user who can manage system communication, for example importing information from other systems or exporting to other systems.
System Viewer	C	Can view raw materials and formulations, but not their compositions. Customers, suppliers and generic documents can also be viewed.
Technical Administrator	A	High level technical and regulatory permissions. Includes ability to add raw materials and compositions, to view formulations and compositions. Also to add and manage technical properties, suitability conditions, party groups and documents.

Select a Role and dependant on the licence level, for example, Certification Administrator is a level B, you may want to check the Operation Permissions that the Role has access to but are not enabled.

Untick 'Show Enabled Operations Only' and untick Licence Level A and select Search.

Please select the operations which the role (Certification Administrator) will be permitted to perform.

Search for Operation

Operation:

Show Enabled Operations Only

Operation Type Standard Service

License Level A B C

Operation	Description	License Level	Allow
Abandon Job Response		B	<input type="checkbox"/>
Abandon a development job		B	<input type="checkbox"/>
Accept a development job		B	<input type="checkbox"/>
Action Tasks		C	<input type="checkbox"/>
Action a Task with End Status		C	<input type="checkbox"/>
Add Last Sale Date in Add Cross Reference		C	<input type="checkbox"/>
Add Last Sample Date in Add Cross Reference		C	<input type="checkbox"/>
Add a New Costing Method		B	<input type="checkbox"/>
Add a new Code Sequence		B	<input type="checkbox"/>
Add a new Project		C	<input type="checkbox"/>
Add a new Project Property		B	<input type="checkbox"/>
Add a new Project Template		B	<input type="checkbox"/>
Add a new TO		B	<input type="checkbox"/>
Add a new Task		C	<input type="checkbox"/>
Add a new Task Type		B	<input type="checkbox"/>
Add a new account manager type		C	<input type="checkbox"/>
Add a new application		B	<input type="checkbox"/>
Add a new character class		B	<input type="checkbox"/>
Add a new character note		B	<input type="checkbox"/>

This will display all the Operation Permissions Licence Level B and C that are not enabled for that Role. Scroll through the permissions to check if the Role needs updating with any of the Operation Permissions. Enable the Permission by selecting Allow and Select Save once all the relevant permissions have been updated for the Role.

Mini Tip

List Roles/Users with specific Operation Permissions

In Manage a Role's Permissions on Operations you can search for specific operations. For example, search for the Operation Permission 'Modify a Formulation's Composition' and this will list Roles which have that Permission enabled.

Manage a Role's Permissions on Operations - FP-SALESDEMO

Please select the role whose permissions on operations will be managed.

Search for Role

Operation: **Modify a formulation s composition**

Show Enabled Operations Only:

Operation Type: Standard Service

License Level: A B C N/A

Role Name	License Level	Description
Formulation Administrator	A	Higher level of access than Formulation Composition Developer. In addition to adding and modifying formulations, can perform global replacements of items. Check in User's pending changes, can add new cross references.
Formulation Composition Developer	A	Can develop and modify formulations and interact with jobs in a way appropriate to a developer. The Role can interact with formulation classes as specified by the Formulation Permissions.
Performer	A	Create and modify formulations by item class
Technical Administrator	A	High level technical and regulatory permissions. Includes ability to add raw materials and compositions, to view formulations and compositions. Also to add and manage technical properties, suitability conditions, party groups ar

Alternatively, you can search in 'Manage a User's Permissions on Operations' and this will list all the Users which have that Permission enabled.

Manage a User's Permissions on Operations - FP-SALESDEMO

Please search for or select the users whose permissions on operations will be managed.

Search for User

User:

Role:

License Level: A B C N/A

Status: Enabled Disabled

Operation: **Modify a formulation s composition**

From User From Role

User ID	Enabled	Shared User License	License Level	Comment
Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>	A	
AutomaticProcessing	<input type="checkbox"/>	<input type="checkbox"/>	A	

To see previous 'Tip of the Month' articles, please see [here](#).

All of our training and support material can be accessed from our **Support Centre**. The Support Centre is available 24/7 and is a great resource to use at your convenience. It includes:

- Over 100 training and support articles
- Links to training videos
- Quick Start Guides
- The Formpak Training Matrix

The Support Centre can be accessed on the Home screen of Formpak software or via the following link: https://www.formpak-software.com/Support_Centre/Pages/Support_Centre.html

Our **Support Team** are available:
Monday - Thursday: 8:30 - 17:00 (GMT)
Friday: 8:30 - 16:00 (GMT)
Email: support@formpak-software.com
Telephone: +44 (0) 1235 250 020

The Formpak **Help Centre** is included directly in Formpak software, just press the 'Help' button to access it. The Formpak Help Centre offers explanations for each function of the application as well as a glossary of the technical terminology used.

View our **YouTube** channel with lots of helpful guides and information about Formpak
<https://www.youtube.com/user/FormpakSoftware/videos>