Click 'Admin Panel' > 'Staff' > 'Roles'

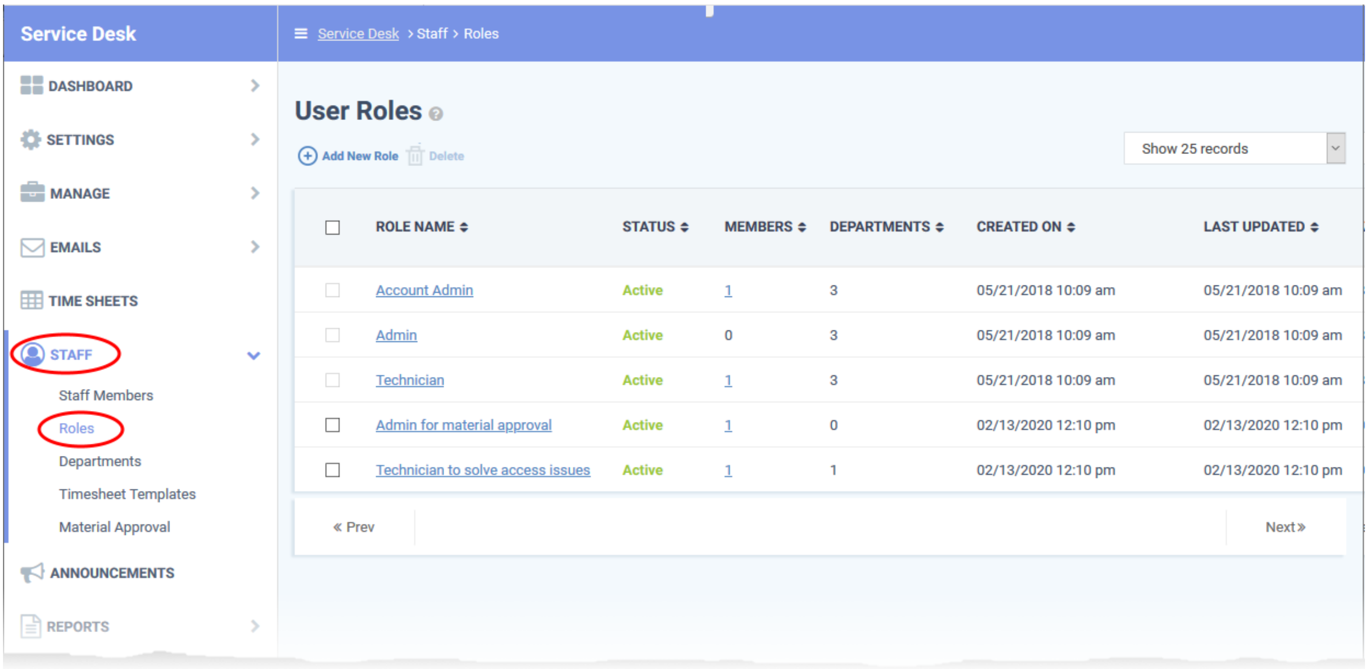
- Roles determine the permissions and access rights that staff members have within the Service Desk interface
- Service Desk inherits three roles from ITarian:
    - Account Administrator
    - Administrator
    - Technician
- 'Account Administrator' and 'Administrator' cannot be deleted, but you can modify them. These roles initially have access to all areas and full control over all departments.
- You can also create custom-named roles with different permissions.
- New staff added to ITarian are added to Service Desk with the same role.
- Admins can move staff to another role in the 'Staff Members' interface (‘Admin Panel’ > ‘Staff’ > ‘Staff Members’ > click on a staff member’s name).
    - See this wiki if you need help to do this.
- This article explains how to create and manage custom roles in Service Desk

Use the following links to jump to the area you need help with:

- Open the roles interface
- Create a new role
- Edit a role
- Remove roles

Open the roles interface

- Login to ITarian
- Click 'Applications' > 'Service Desk'
- Open the admin panel (see the last link on the left)
- Click 'Staff' > 'Roles':



Role Name: The role label.

Status: Enable or disable the role.

- Staff members with a disabled role cannot log in to Service Desk.
- Click the role name to activate/deactivate the role.

Members: The number of staff members assigned to the role.

- Click the number to view the member list.

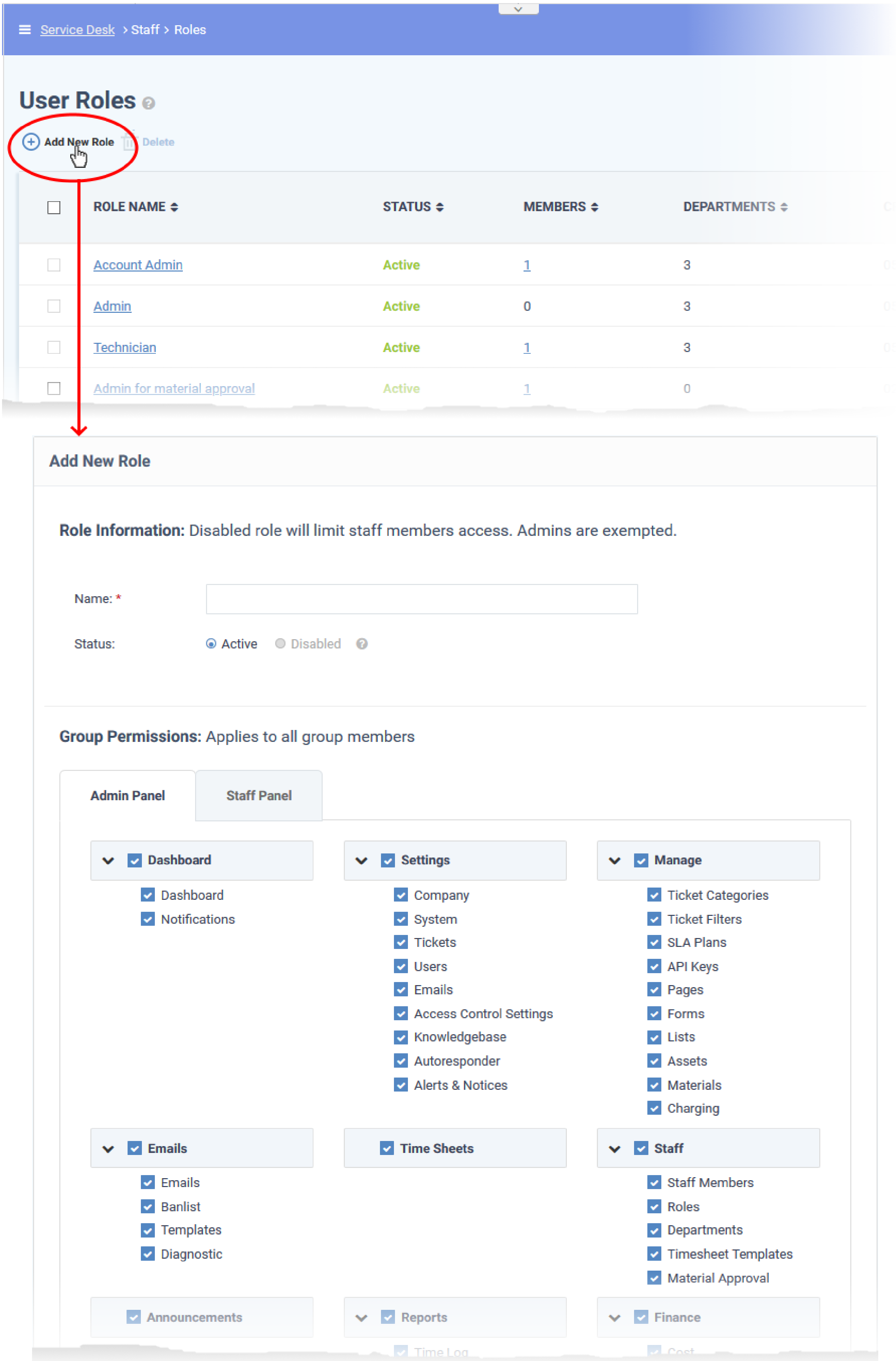
Departments: The number of departments that can be accessed by role members.

Created On: The date and time at which the role was created.

Last Updated: The date and time the role was last modified.

Create a new role

- Open the admin panel (see the last link on the left)
- Click 'Staff' > 'Roles'
- Click 'Add New Role' at the top:


Service Desk > Staff > Roles
User Roles
Add New Role
Delete
ROLE NAME
STATUS
MEMBERS
DEPARTMENTS
Account Admin
Active
1
3
Admin
Active
0
3
Technician
Active
1
3
Admin for material approval
Active
1
0
Add New Role
Role Information: Disabled role will limit staff members access. Admins are exempted.
Name: *
Status:
Active
Disabled
Group Permissions: Applies to all group members
Admin Panel
Staff Panel
Dashboard
Dashboard
Notifications
Settings
Company
System
Tickets
Users
Emails
Access Control Settings
Knowledgebase
Autoresponder
Alerts & Notices
Manage
Ticket Categories
Ticket Filters
SLA Plans
API Keys
Pages
Forms
Lists
Assets
Materials
Charging
Emails
Emails
Banlist
Templates
Diagnostic
Time Sheets
Staff
Staff Members
Roles
Departments
Timesheet Templates
Material Approval
Announcements
Reports
Finance

From top-to-bottom, role permissions are split into three main groups:

- **Group permissions** - which areas of the staff and admin panels are visible to role members.
- **Functional permissions** - what actions role members can or cannot do.
- **Department access** - which departments role members are allowed to access.

The ' Add New Role' screen contains the following fields and options:

Role Information

- **Name:** Enter a descriptive label for the role.
- **Status:** Select whether the role is active or disabled. If disabled, role members cannot log in to Service Desk and will not receive department alert & notices.

Group Permissions

- Group permissions let you set access rights to specific features and areas of Service Desk. You can set different permissions for both the admin and staff panels.
- Disabled features will not be visible to staff who have this role.
- The area directly underneath lets you choose the functions that role members can perform:

Group Permissions: Applies to all group members

Admin Panel | **Staff Panel**

- [x] **Dashboard**
  - [x] Dashboard
  - [x] Notifications
- [x] **Settings**
  - [x] Company
  - [x] System
  - [x] Tickets
  - [x] Users
  - [x] Emails
  - [x] Access Control Settings
  - [x] Knowledgebase
  - [x] Autoresponder
  - [x] Alerts & Notices
- [x] **Manage**
  - [x] Ticket Categories
  - [x] Ticket Filters
  - [x] SLA Plans
  - [x] API Keys
  - [x] Pages
  - [x] Forms
  - [x] Lists
  - [x] Assets
  - [x] Materials
  - [x] Charging
- [x] **Emails**
  - [x] Emails
  - [x] Banlist
  - [x] Templates
  - [x] Diagnostic
- [x] **Time Sheets**
- [x] **Staff**
  - [x] Staff Members
  - [x] Roles
  - [x] Departments
  - [x] Timesheet Templates
  - [x] Material Approval
- [x] **Announcements**
- [x] **Reports**
  - [x] Time Log
  - [x] Tickets
  - [x] Assets
  - [x] Service Types
  - [x] Departments
  - [x] Agents
  - [x] Users
  - [x] Resource Appointment
- [x] **Finance**
  - [x] Cost
  - [x] Contracts

- [ ] Can **Edit** Tickets *Ability to edit tickets.*
- [ ] Can **Post Reply** *Ability to post a ticket reply.*
- [ ] Can **Close** Tickets *Ability to close tickets. Staff can still post a response.*
- [ ] Can **Assign** Tickets *Ability to assign tickets to staff members.*
- [ ] Can **Transfer** Tickets *Ability to transfer tickets between departments.*
- [ ] Can **Delete** Tickets *Ability to delete tickets (Deleted tickets can't be recovered!)*
- [ ] Can **Ban** Emails *Ability to add/remove emails from banlist via ticket interface.*
- [ ] Can **Change Outgoing** Emails *Ability to change default outgoing email address during ticket reply.*
- [ ] Can **Manage Premade** *Ability to add/update/disable/delete canned responses and attachments.*
- [ ] Can **Manage FAQ** *Ability to add/update/disable/delete knowledgebase categories and FAQs.*
- [ ] Can **View Staff Stats** *Ability to view stats of other staff members in allowed departments.*
- [ ] Can **See Issue Summary & Details**On Top *Ability to see issue summary& details on top in new ticket screen.*

Department Access

- Select which departments can be accessed by role members. These departments are added to the primary department to which the staff member belongs.

Admin Notes

- Add remarks regarding the role for the reference of other admins.

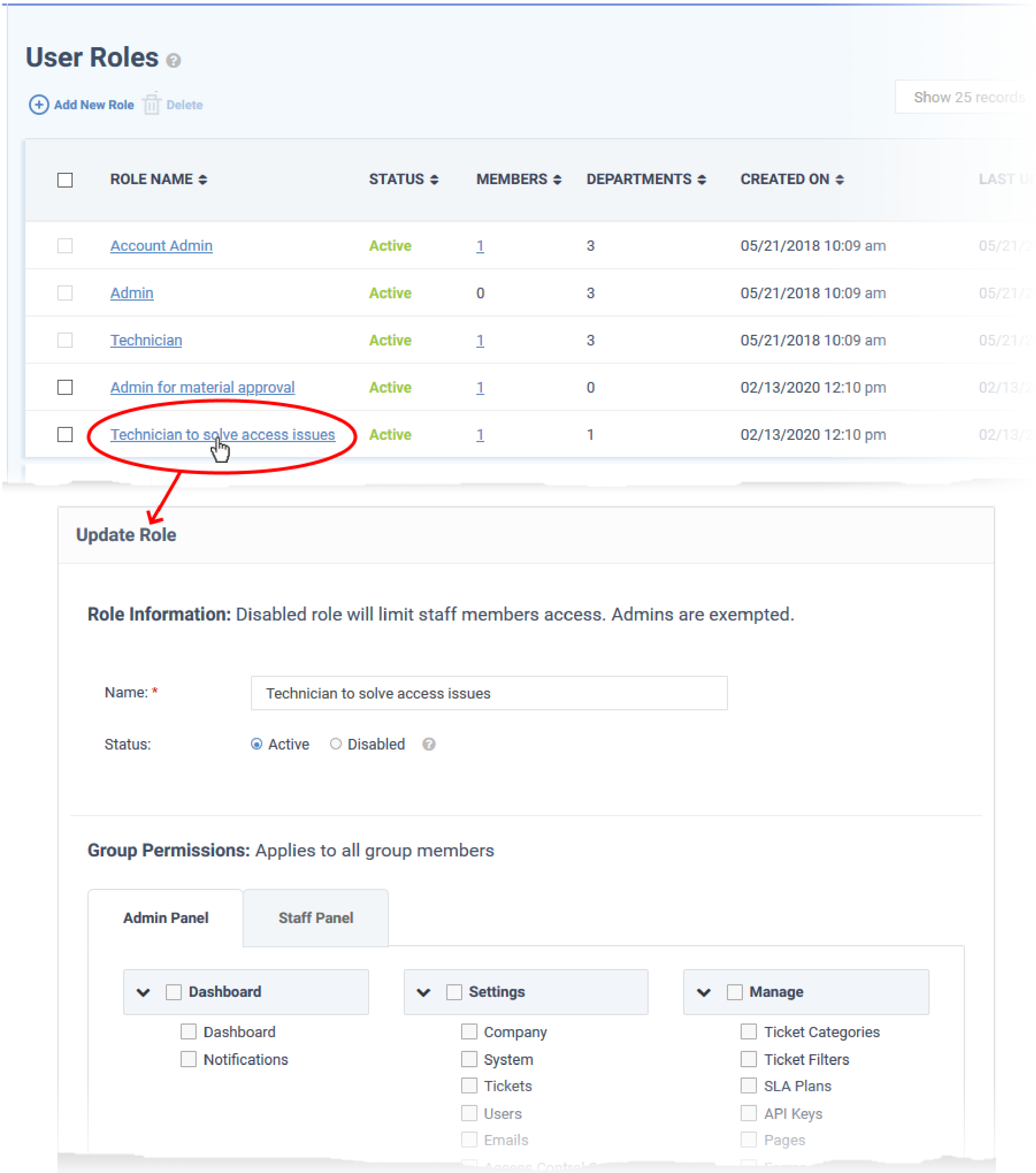
Click the 'Create Role' button to save your new role.

Edit a role

- Open the admin panel (see the last link on the left)

- Click 'Staff' > 'Roles'

- Click on the role you want to edit.



The 'Update Role' interface lets you change the role name, enable/disable the rule and change role permissions. The interface is similar to the 'Add New Role' interface. See the explanation above for help to do this.

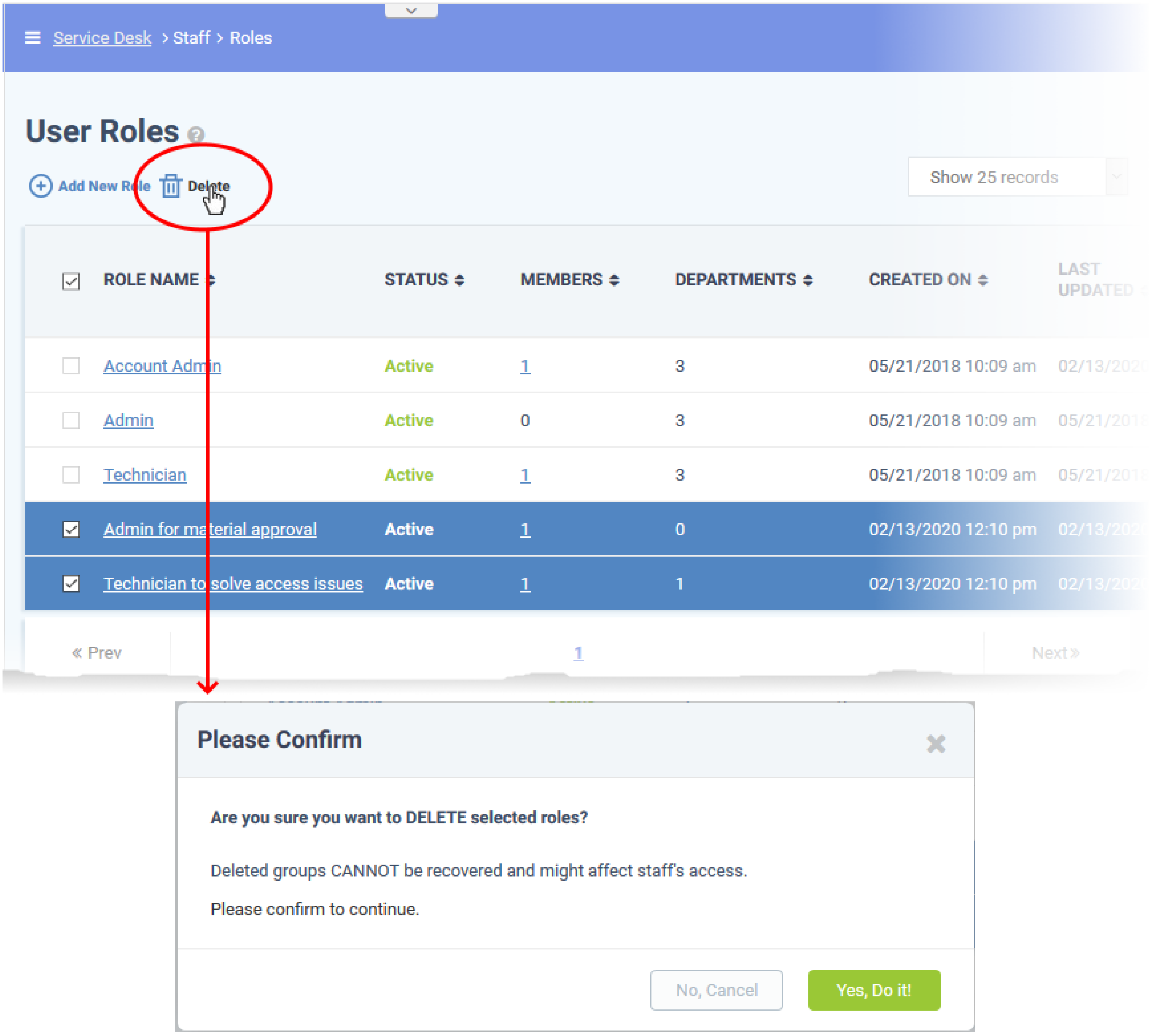
Remove roles

- You cannot delete roles inherited from ITarian, and you cannot delete roles that still have staff assigned to them.

- Remove all staff from a role before attempting to delete it.

Remove a role

- Open the admin panel (see the last link on the left)
- Click 'Staff' > 'Roles'
- Select the role you want to remove
- Click 'Delete':



- Click 'Yes, Do it!' to confirm the removal