Creating Custom Role Groups for Sedona-X Mobile

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Sedona-X Mobile offers five (5) default groups. You can find the matrix of what each default role group includes here.

This article reviews how to create your own custom Role Groups.

NOTE: At this time, we cannot clone default role groups and edit them. Custom role groups also cannot be cloned at this time.

Before you start creating role groups, it's important to understand the API terms and what they mean:

- **GET/GETALL:** Refers to a query to return information. When choosing this, the API is going to 'get' the information and return it.
- **GET [name of category]:** Allows for permission to that location within the application.
- **POST:** If selected as a permission, this allows the user to add new information.
- **UPDATE:** This permission allows the user to update existing information.
- **DELETE:** This permission allows the user to delete/remove information.

Definitions of permissions

- Here's a quick video on the terminology:
- Your browser does not support HTML5 video.
- **A few callouts on terminology:**
  - **Dispatch:** Dispatch is used for chargeable time. Use dispatch for technician service (customer) appointments, i.e. schedule for a service ticket.
  - **Appointments**: Appointments are for items you want to put on the calendar that are not chargeable. These are for your internal use. Use appointments for technician time off, dr. appoints, etc.

We suggest adding Role Groups at the Host level so that it is available to all your companies. Watch the video here for an understanding of the difference.

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To create a custom role group

1. Login to SedonaAPI as a Host Admin

2. Select **Role Group** from the top menu
3. Click **Add Role Group**
4. Under **Add Role Group**:
   - **Group Name:** This will be the new role group name.
   - **Group Description:** Brief description of the new role.
   - **Permissions:** This is where you select the permissions for this new role group.
     - Start at the API section. Expand the API section by clicking the carrot symbol next to the box by API
     - Click in the box next to select that permission set. See the example below.
5. After you've created your group, click **Submit**.

Let's look at an example. An administrative assistant needs a view of service tickets. We want them to be able to see all tickets, update existing tickets, and add new information. We don't want them to delete or remove them. Here's what we would choose under permissions:

See it in action here:

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Assign custom role groups to users

Before you assign users to your custom role group, be sure that you have all the permissions selected. If you add permissions after users have been assigned, you must remove the user and re-add the user to the custom role group.

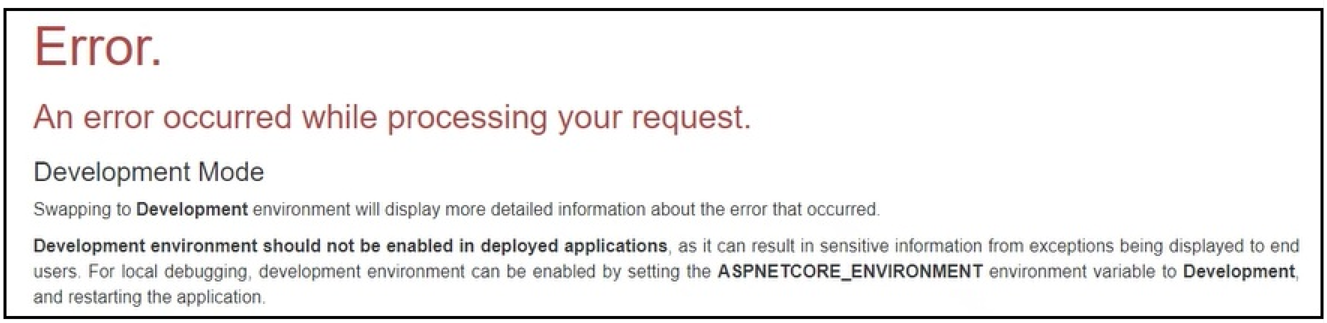
To add a user, find instructions **here**.

1. Locate your user.
2. At the bottom of the user, there will be two choices under **Permissions**.
3. Click the radio button next to **Role Group**.
4. From the drop-down menu, locate and select the **Administrative Assistant** role group.
5. Click **Submit** to save the permissions for that user.
6. For more detailed instructions on User Permissions, refer to this **article**.

See it in action here:

Your browser does not support HTML5 video.

Error Message



If you receive this error, it means that a change was made to your custom role group where users were assigned. The users will not have the change reflective. See below.

If you make changes to a custom role group, you will have to reassign users to it in order for those changes to be reflected for all users.