

## Assigning roles, tasks and depots to an internal user

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**!** Only internal users can assign roles, tasks and depots, and require the **Super User** task **Modify User**

### Assigning roles

1. Create a new user from the **Create User** screen, or select an existing user from the **Modify User** screen and click the **Details** button
2. Check the roles you want to assign to a user
3. Click the role's **Update** button to apply these changes

The screenshot shows the 'User Details' screen in the iCOSLIVE system. At the top, the iCOSLIVE logo and 'User Details' title are visible. Below the title bar, there are input fields for user information: User Name (eterry), Full Name (Terry Teo), e-mail (terry@emmanuels.nz), Position (Dispatcher), Company (Emmanuel Transport), Phone (021 123 456), Mobile (09 1234567), and Depots (No Selection). The main area is divided into three sections: Roles, Tasks, and Depots. The Roles section is highlighted with a red box and contains a list of roles with checkboxes: Super User (checked), Financials (checked), Vehicle Kms (unchecked), Dispatch (checked), and Reporting (unchecked). A red circle with the number '2' is placed next to the Roles section. At the bottom of the Roles section, there is a red circle with the number '3' next to an 'Update' button. The Tasks section is empty. The Depots section contains a list of depots with checkboxes: Auckland DEPOT, Christchurch DEPOT, Dunedin DEPOT, and Obakune DEPOT. Below the depots list, there is an 'Update' button. At the bottom right of the screen, there are two buttons: 'New User' and 'Modify User'. An 'Update' button is also located at the bottom center of the screen.

### Assigning Tasks

1. Select a role from the **Tasks** dropdown
2. Check the **tasks** you want to assign or deassign to a user
3. Click the task's **Update** button to apply these changes

The screenshot shows the 'User Details' page for a user named Terry Teo. The page has a header with the iCOSLIVE logo and a close button. Below the header, there are input fields for User Name, Full Name, e-mail, Position, Company, Phone, Mobile, and Depots. The 'Tasks' section is highlighted with a red box and contains a dropdown menu with the following options: Dispatch, Financials, and Super User. The 'Roles' section on the left has checkboxes for Super User, Financials, Vehicle Kms, Dispatch, and Reporting. The 'Depots' section on the right has a list of depots: Auckland DEPOT, Christchurch DEPOT, Dunedin DEPOT, and Ohakune DEPOT. There are three numbered callouts: 1 points to the 'Dispatch' option in the Tasks dropdown, 2 points to the 'Update' button at the bottom of the Tasks section, and 3 points to the 'Update' button at the bottom of the Roles section.

**i** Information about each task available to internal users can be found in the [Assigning roles, tasks and depots to an internal user](#) article

## Assigning Depots (Optional)

Assigning depots to a user allows you to restrict what bookings they can see on their dispatch workbench and/or sets their default depot. If you are creating a user for the first time or have not yet read the depot chapter, this step can be skipped for now.

1. Optionally select a **default** the users default depot

2. Select the depots that the user has access to
3. Click the depot's **Update** button to apply these changes

The screenshot shows the 'User Details' form in the iCOSLIVE system. The form is divided into several sections: User Information, Roles, Tasks, and a Depot Selection dropdown. The 'User Information' section contains fields for User Name (eterry), Full Name (Terry Teo), e-mail (terry@emmanuels.nz), Position (Dispatcher), Company (Emmanuel Transport), Phone (021 123 456), and Mobile (09 1234567). The 'Roles' section has checkboxes for Super User, Financials, Vehicle Kms, Dispatch, and Reporting. The 'Tasks' section has checkboxes for various booking and manifest-related tasks. The 'Depots' dropdown is currently set to '-- No Selection --'. A red box highlights the 'Depots' dropdown and the 'Update' button below it. Three numbered callouts are present: 1 points to the 'Depots' dropdown, 2 points to the 'Dispatch' task, and 3 points to the 'Update' button. The 'Update' button is located at the bottom right of the form.

**icoslive** User Details

User Name:  Full Name:  e-mail:  Position:

Company:  Phone:  Mobile:  Depots:

**Roles**

- ☒ Super User
- ☒ Financials
- ☐ Vehicle Kms
- ☒ Dispatch
- ☐ Reporting

**Tasks**

- ☒ Bookings - Allow edit
- ☒ Bookings - Allow cancellation
- ☐ Bookings - Show Manifests Tab
- ☐ Bookings - Tracklines - Show Manifest Detail
- ☒ Bookings - HIAB
- ☒ Booking Entry - Show Rate Hints
- ☒ Booking Entry - Show No Dispatch
- ☒ Booking Entry - Freight - Show Export

Dispatch

☒ --- ALL ---

☒ Auckland DEPOT

☒ Christchurch DEPOT

☒ Dunedin DEPOT

☒ Ohakune DEPOT

**Update**

**New User**

**Modify User**

**Update**

Preview