

Controlling Access with Roles

Roles define what actions users can perform in Atra RMS. Each role is a set of permissions that controls access to Devices, Users, Organizations, VPN, and Roles features.

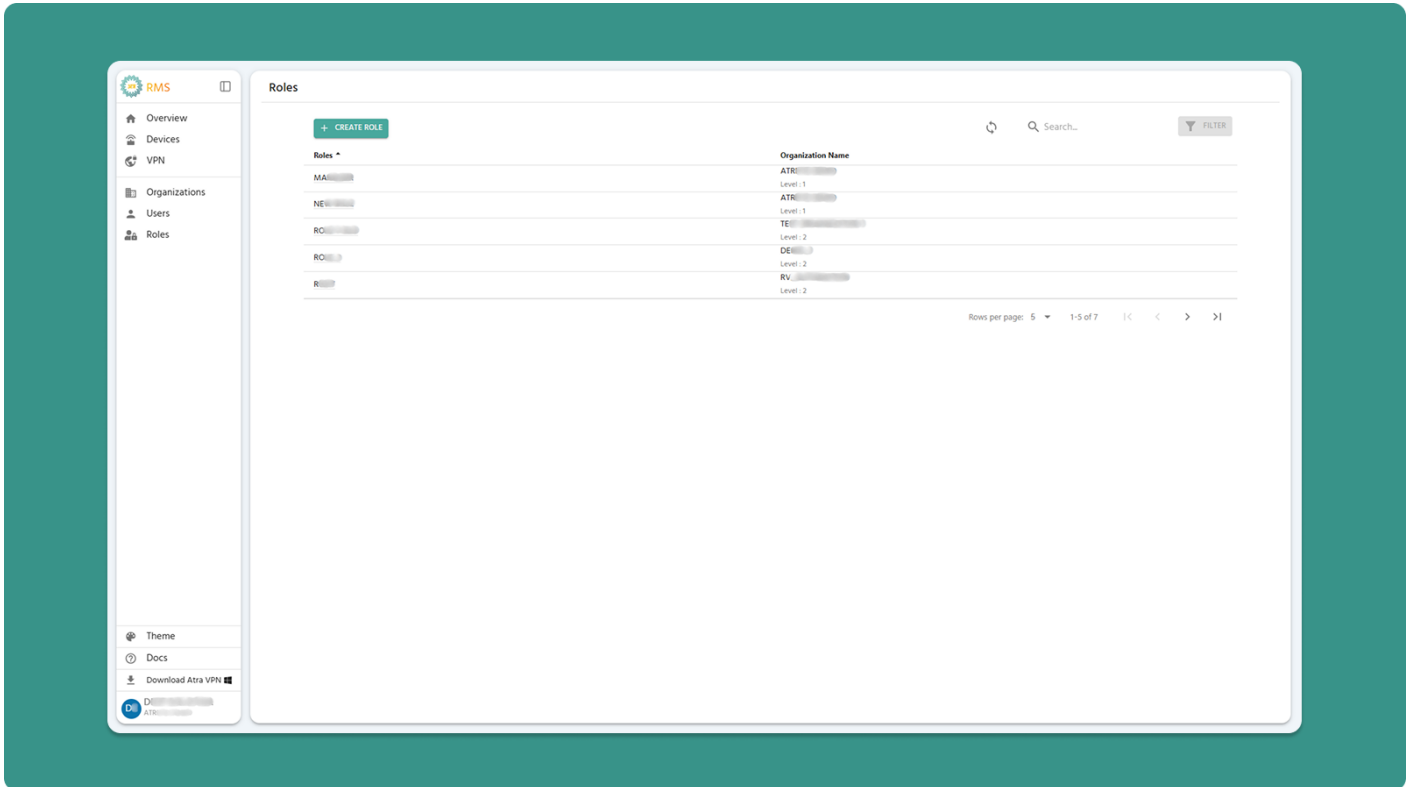
Key Benefits:

- Security through least-privilege access
- Easy permission management
- Organization-specific customization

- [View Roles](#)
- [Role Creation Guide](#)
- [Understanding Role Permissions](#)
- [Roles & Permissions FAQs](#)

View Roles

View all roles in your organization and child organizations.



Actions:

- **+CREATE ROLE (Teal button)** - Create new role
- **Search Bar** - Filter by role name or organization
- **Refresh** - Update list

Table Columns:

- **Roles** - Role name (click to view details)
- **Organization Name** - Where role exists

Navigation: Rows per page (5, 10, 15, 20, 25) | Page controls

Role Creation Guide

Quick Steps

1. Click **+CREATE ROLE** button
2. Enter **Role Name** (3-50 characters, letters/numbers/spaces/-/_)
3. Select **Organization**
4. Check permissions for each section
5. Click **CREATE**

The screenshot shows the 'Create New Role' interface. It is divided into two main sections. The left section, titled 'Select Permissions', contains five categories of permissions, each with a list of actions and checkboxes:

- Devices:** Register, View, Update, Unregister
- Users:** Create, View, Update, Delete
- Roles:** Create, View, Update, Delete
- Organizations:** Create, View, Update, Delete
- Vpn:** Create, View, Update, Delete, Startstop, Enabledisable

The right section contains a form for role creation. It includes a 'Role Name *' text input field, an 'Organization Name *' dropdown menu, and three buttons: 'RESET', 'CREATE ROLE', and 'CLOSE'. An illustration of a person with a clipboard is positioned above the form fields.

Role Name Rules

- ❑ **Valid:** Company Admin, Device_Manager, Field-Technician
- ❑ **Invalid:** _Admin (starts with _), Role- (ends with -), Admin_Role (consecutive __)

Permissions by Section

1. Devices

- **Register** - Add new devices
- **View** - See device list and details
- **Edit** - Modify device info
- **Unregister** - Remove devices

2. Users

- **Create** - Invite new users
- **View** - See user list
- **Edit** - Change names/roles
- **Delete** - Remove users

3. Roles

- **Create** - Define new roles
- **View** - See role list
- **Edit** - Modify permissions and name
- **Delete** - Remove roles

4. Organizations

- **Create** - Add child organizations
- **View** - See organization list
- **Edit** - Change names
- **Delete** - Remove organizations

5. VPN

- **Create** - Make VPN tunnels
- **View** - See VPN list
- **Edit** - Change tunnel names
- **Delete** - Remove tunnels, and remove devices and users from tunnel
- **Start/Stop** - Control VPN process
- **Enable/Disable** - Manage tunnel status

Permission Rules

⚠ View Dependency

Must check View permission when checking any other permission in that section.

- ☐ **Valid:** Devices View + Register
- ☐ **Invalid:** Devices Register only (system auto check View)

⚠ VPN Dependency

Must check Devices View when checking any VPN permission.

- ☐ **Valid:** VPN View + Devices View
 - ☐ **Invalid:** VPN View only (system auto check Devices View)
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Common Role Templates

System Administrator

- ✓ All permissions in all sections

Device Manager

- ✓ **Devices:** Register, View, Edit
- ✓ **Users:** View
- ✓ **Organizations:** View

Field Technician

- ✓ **Devices:** Register, View

Network Administrator

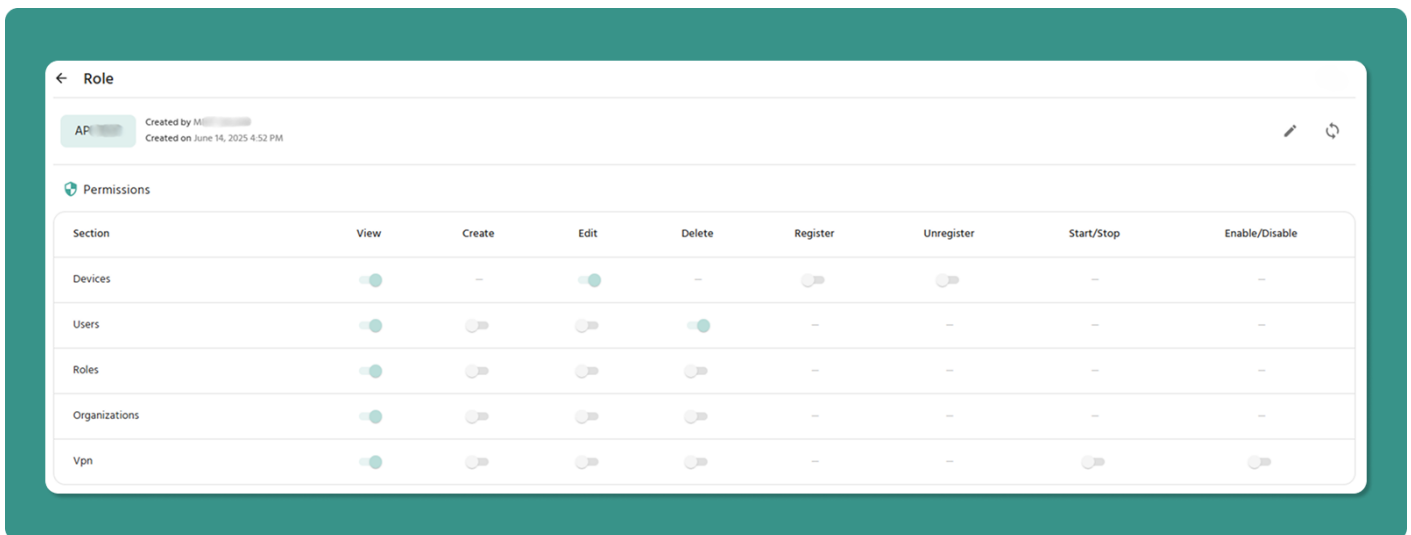
- ✓ **Devices:** View
- ✓ **VPN:** All permissions

Read-Only Viewer

- ✓ **All sections:** View only

Understanding Role Permissions

Click any role name in the list to open the Role Detail Page.

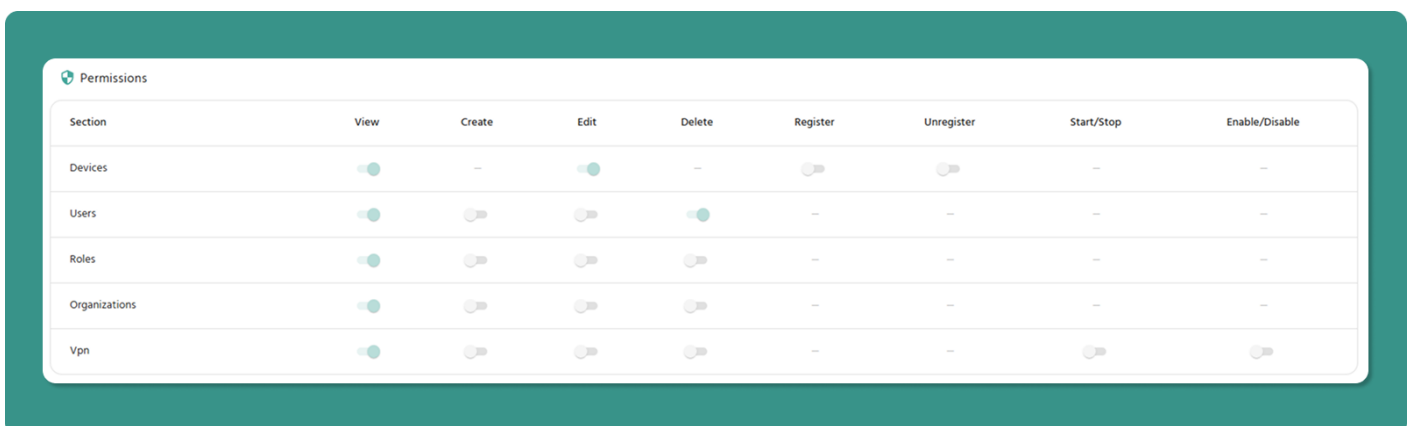


Role Detail Page Shows:

- Role name and metadata (Created By, Created On)
- Permissions table with all sections
- Edit button (✎) to modify role
- Refresh button (🔄) to update data

Permissions Table

Displays all permissions in table format with toggle switches.



Columns: Section | View | Create | Edit | Delete | Register | Unregister | Start/Stop | Enable/Disable

Toggle States:

- **ON (Teal/Green, right position)** - Permission granted
- **OFF (Gray, left position)** - Permission not granted

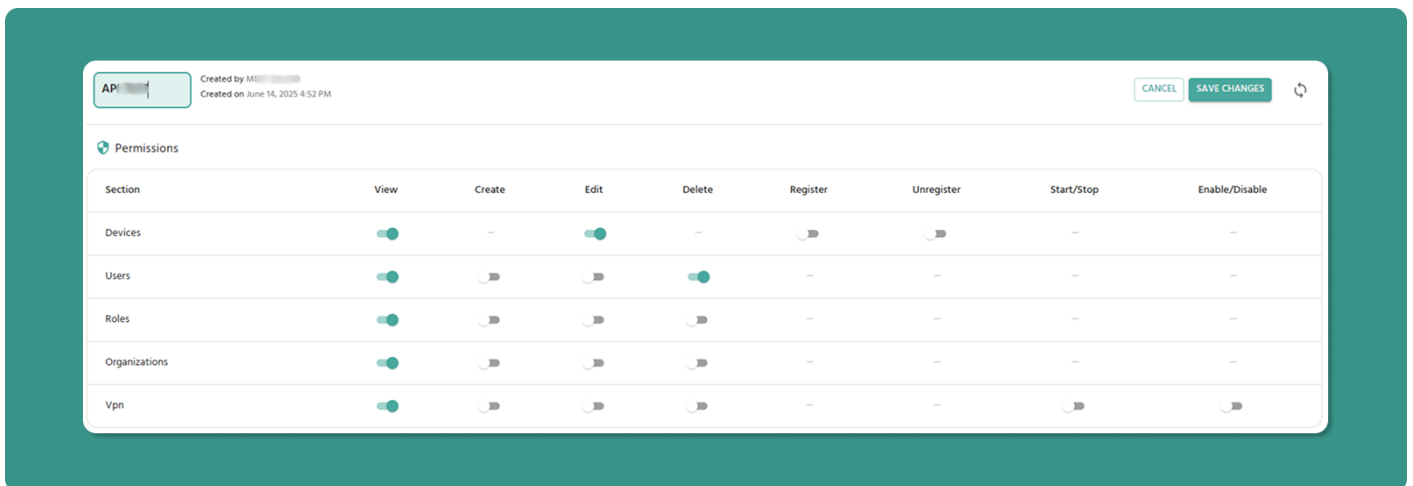
Section-Specific Columns:

- **Register/Unregister** - Devices only
- **Start/Stop, Enable/Disable** - VPN only
- **Dashes (-)** - Not applicable

Editing a Role

Entering Edit Mode

1. Open Role Detail Page (click role name)
2. Click Edit button (✎) in header
3. Page becomes editable



What Changes in Edit Mode

Role Name: Becomes text input field (editable)

Toggle Switches: Become active (clickable)

Buttons: SAVE CHANGES and CANCEL appear

Modifying Permissions

To Grant Permission:

1. Click toggle switch (currently OFF/gray)
2. Switch moves right, turns teal/green
3. Permission granted when saved

To Revoke Permission:

1. Click toggle switch (currently ON/teal)
 2. Switch moves left, turns gray
 3. Permission revoked when saved
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Dependency Enforcement

System automatically maintains dependencies:

View Dependency:

- Turning ON any permission → Auto-enables View
- Turning OFF View → Auto-disables other permissions in that section

VPN Dependency:

- Turning ON any VPN permission → Auto-enables Devices View
 - Turning OFF Devices View → Auto-disables all VPN permissions
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Saving Changes

1. Review all modifications
2. Click SAVE CHANGES button (teal)
3. Changes apply immediately to all users with this role

To Discard Changes: Click CANCEL button (red)

Important Notes

Company Admin Role

⚠ Cannot be edited - System-protected role with full access. Edit button is hidden.

Need custom admin? Create a new role with desired permissions.

Permission Changes

- Take effect immediately after saving
- △ Users may need to refresh browser to see changes
- Best practice: Notify users before major permission changes

Browser Refresh

- △ **Refreshing browser in Edit Mode loses all unsaved changes**

Roles & Permissions FAQs

Quick Troubleshooting

Can't see Edit button?

- Check you have "Roles Edit" permission
- Verify not trying to edit Company Admin role

Can't toggle switches?

- Click Edit button first to enter Edit Mode

Changes not saving?

- Check role name follows rules (3-50 chars)
- Verify dependencies satisfied
- Check internet connection

Role not appearing when inviting users?

- Verify role created in correct organization
- Refresh page

Permission Matrix

Section	View	Create	Edit	Delete	Register	Unregister	Start/Stop	Enable/Disable
Devices	✓	-	✓	-	✓	✓	-	-
Users	✓	✓	✓	✓	-	-	-	-
Roles	✓	✓	✓	✓	-	-	-	-
Organizations	✓	✓	✓	✓	-	-	-	-
VPN	✓	✓	✓	✓	-	-	✓	✓

Legend: ✓ = Available | - = Not applicable

Summary

Role Management Workflow:

1. Create role → Define permissions
2. View role details → Check permissions table
3. Edit role → Modify permissions as needed
4. Assign to users → Permissions apply immediately

Key Points:

- Always enable View when enabling other permissions
 - Enable Devices View when enabling VPN permissions
 - Company Admin role cannot be edited
 - Changes take effect immediately upon saving
 - Test roles before production deployment
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