



Employees, Roles and permissions

ADITO Software GmbH

From version xRM 2026.4.0 | April 2026





Screenshots

The UX design of ADITO is continuously optimized for you. There may therefore be deviations in the screenshots.



Agenda



Employee administration

- [Adding employees](#)
- [Assigning roles](#)
- [Password](#)
- [Employee Attributes](#)
- [Calendar permission](#)
- [User Tokens](#)

Roles & permission administration

- [Role-dependent possibilities](#)
- [Overview of roles](#)
- [Role-dependent menu structure](#)
- [Adding roles](#)
- ["Passing on" roles](#)
- [Configuring permission for Entitys, Fields and Actions](#)
- [Deleting roles](#)
- [Deactivating permissions](#)

Click on the ADITO A in this document to return to the agenda.



Employee



Employee

An employee is a user of the CRM system.

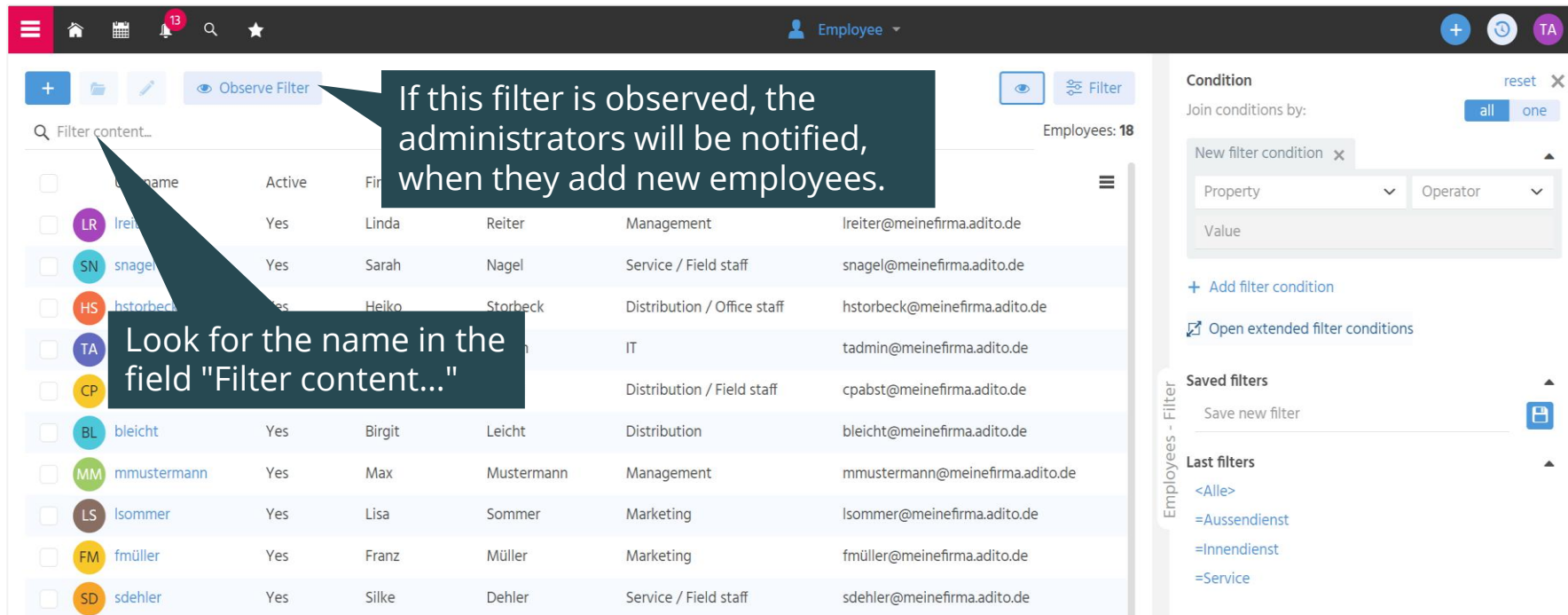
The Context "Employee" consists of administration functions:

- Adding an employee
- Password assignment
- Role assignment
- Attributes/documents
- Calendar permission
- User Token



Employee

Overview – FilterView



Observe Filter

Filter content...

If this filter is observed, the administrators will be notified, when they add new employees.

Look for the name in the field "Filter content..."

Employees: 18

Condition

Join conditions by: all one

New filter condition x

Property Operator

Value

+ Add filter condition

Open extended filter conditions

Saved filters

Save new filter

Last filters

<Alle>

=Aussendienst

=Innendienst

=Service

	Name	Active	First name	Last name	Department	Email
☐	LR	Yes	Linda	Reiter	Management	lireiter@meinefirma.adito.de
☐	SN	Yes	Sarah	Nagel	Service / Field staff	snagel@meinefirma.adito.de
☐	HS	Yes	Heiko	Storbeck	Distribution / Office staff	hstorbeck@meinefirma.adito.de
☐	TA				IT	tadmin@meinefirma.adito.de
☐	CP				Distribution / Field staff	cpabst@meinefirma.adito.de
☐	BL	Yes	Birgit	Leicht	Distribution	bleicht@meinefirma.adito.de
☐	MM	Yes	Max	Mustermann	Management	mmustermann@meinefirma.adito.de
☐	LS	Yes	Lisa	Sommer	Marketing	lsommer@meinefirma.adito.de
☐	FM	Yes	Franz	Müller	Marketing	fmüller@meinefirma.adito.de
☐	SD	Yes	Silke	Dehler	Service / Field staff	sdehler@meinefirma.adito.de

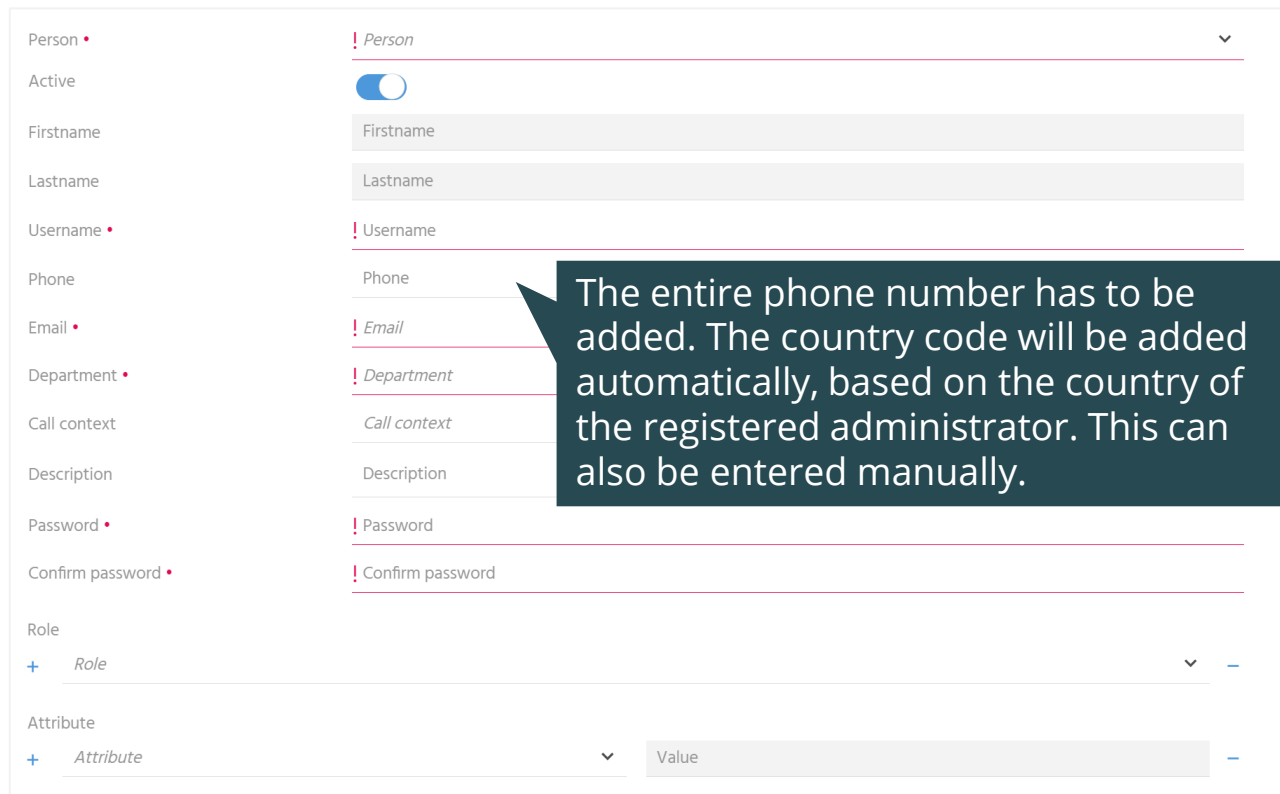
Employee

Adding employee

Requirement:

The employee is added as Contact in CRM.

This is necessary, since the data within the contact will be used for, e.g. placeholders in emails, letters, serial mails, etc.



The screenshot shows the ADITO employee form. The form is divided into two columns. The left column contains labels for various fields, and the right column contains the corresponding input fields. The fields are: Person (with a dropdown arrow), Active (a toggle switch), Firstname (text input), Lastname (text input), Username (with a red exclamation mark icon), Phone (text input), Email (with a red exclamation mark icon), Department (with a red exclamation mark icon), Call context (text input), Description (text input), Password (with a red exclamation mark icon), Confirm password (with a red exclamation mark icon), Role (with a dropdown arrow), and Attribute (with a dropdown arrow). A callout box points to the Phone field with the text: "The entire phone number has to be added. The country code will be added automatically, based on the country of the registered administrator. This can also be entered manually."

Person •	! Person
Active	☒
Firstname	Firstname
Lastname	Lastname
Username •	! Username
Phone	Phone
Email •	! Email
Department •	! Department
Call context	Call context
Description	Description
Password •	! Password
Confirm password •	! Confirm password
Role	
+ Role	
Attribute	
+ Attribute	Value

Employee

Connection to telephone system

Telephone: Phone number of telephone system

Example:

An employee leaves the company and the phone number will be assigned again.

1. The former user will be set as inactive.
2. The new active user receives the extension of the previous user.

Connection to Exchange

Employee email address will be used for the connection to the calendar. If this changes, the calendar ID will also change, i.e. the assigned calendar changes.

Example:

Employee changes their name.

1. Context Contact: Change name and contact email address.
2. Context Employee: Change user name and Employee email address.
3. User has to sign in again.

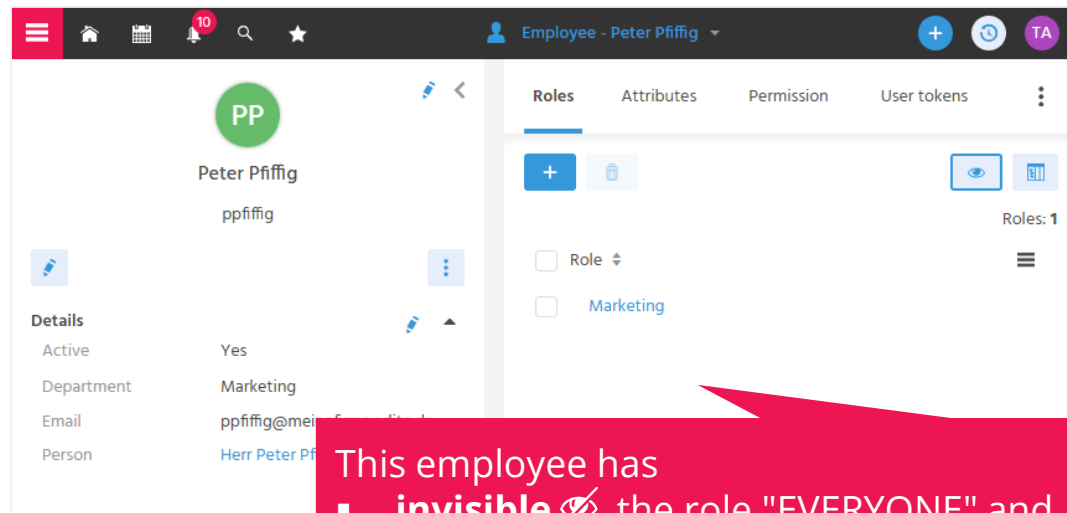


Ultimately, the individually customized project must always be considered here.

Employee

Tab "Roles"

- Every employee has the role **"EVERYONE"**, this will **not** be shown in the overview.
- The additional assigned roles will be displayed in the **tab "Roles"**.



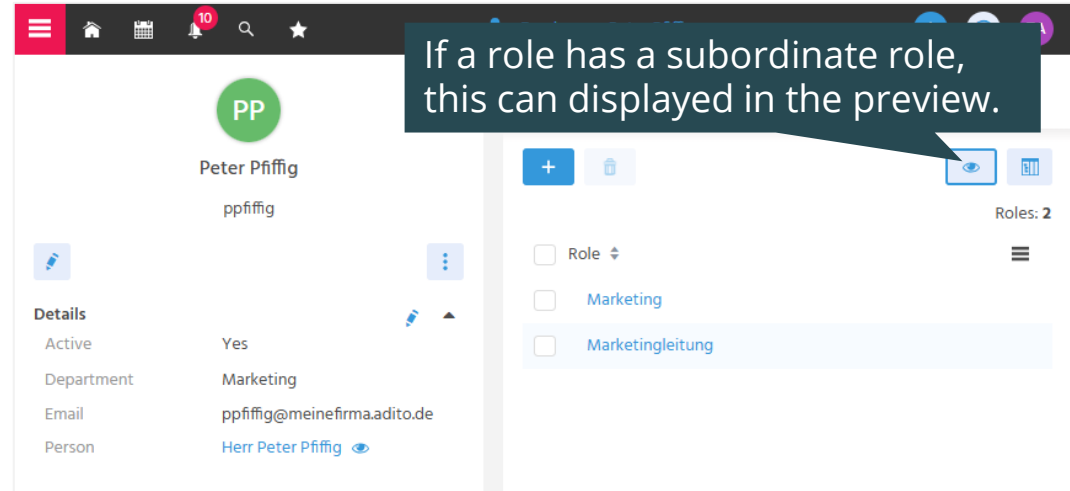
This employee has

- **invisible**  the role "EVERYONE" and
- **visible**  the roles "Marketing".

Employee

Tab "Roles"

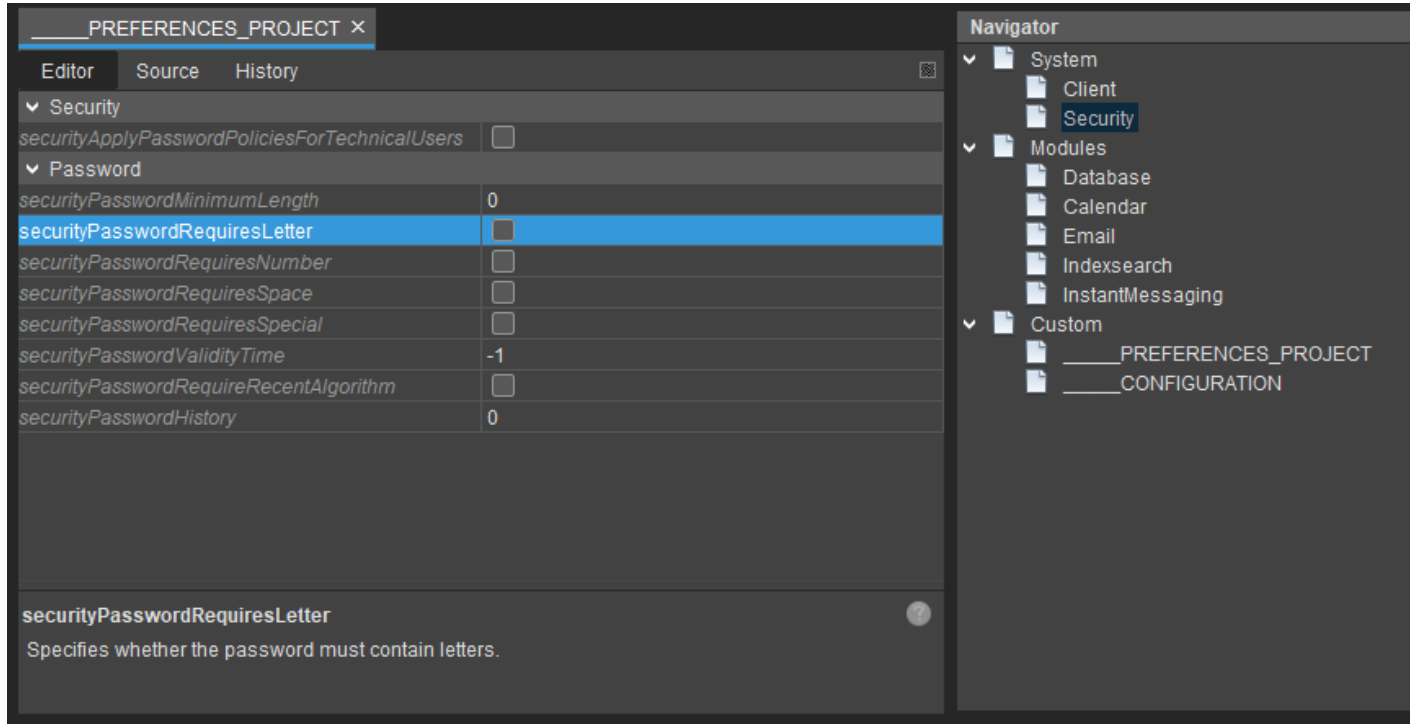
- Additional roles can be added in order to assign further roles to the employee.
- Roles can be deleted in order to remove them.
- The roles are connected with OR.



After changing the role assignment, the Client must be restarted, or the employee must login again.

Employee

Defining password guidelines in ADITO Designer



The screenshot displays the ADITO Designer interface for configuring password guidelines. The main window is titled "____PREFERENCES_PROJECT x" and has tabs for "Editor", "Source", and "History". The "Editor" tab is active, showing a tree view of security settings. The "Security" folder is expanded, and the "Password" sub-folder is selected. The "securityPasswordRequiresLetter" property is highlighted in blue. The value for this property is currently set to "0".

Property	Value
securityApplyPasswordPoliciesForTechnicalUsers	☐
securityPasswordMinimumLength	0
securityPasswordRequiresLetter	0
securityPasswordRequiresNumber	☐
securityPasswordRequiresSpace	☐
securityPasswordRequiresSpecial	☐
securityPasswordValidityTime	-1
securityPasswordRequireRecentAlgorithm	☐
securityPasswordHistory	0

The "securityPasswordRequiresLetter" property is described as: "Specifies whether the password must contain letters."

The "Navigator" panel on the right shows the project structure:

- System
 - Client
 - Security
- Modules
 - Database
 - Calendar
 - Email
 - Indexsearch
 - InstantMessaging
- Custom
 - ____PREFERENCES_PROJECT
 - ____CONFIGURATION

Employee | password

Set password as administrator

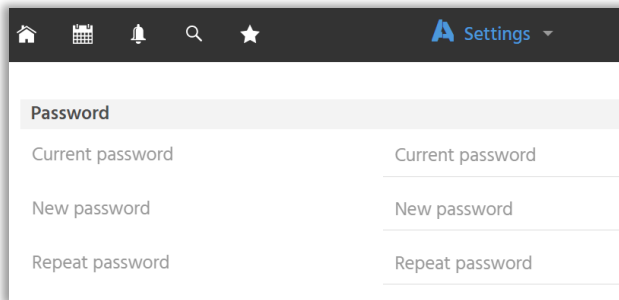
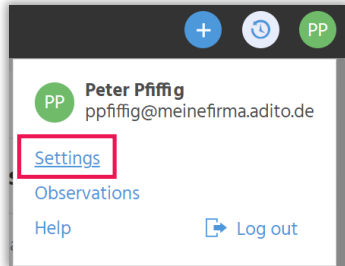
- When **creating a new** employee
- **Reset**



A random password is set for employees who are newly created via the AD process. **The administrator must then manually set a new password for the users.**

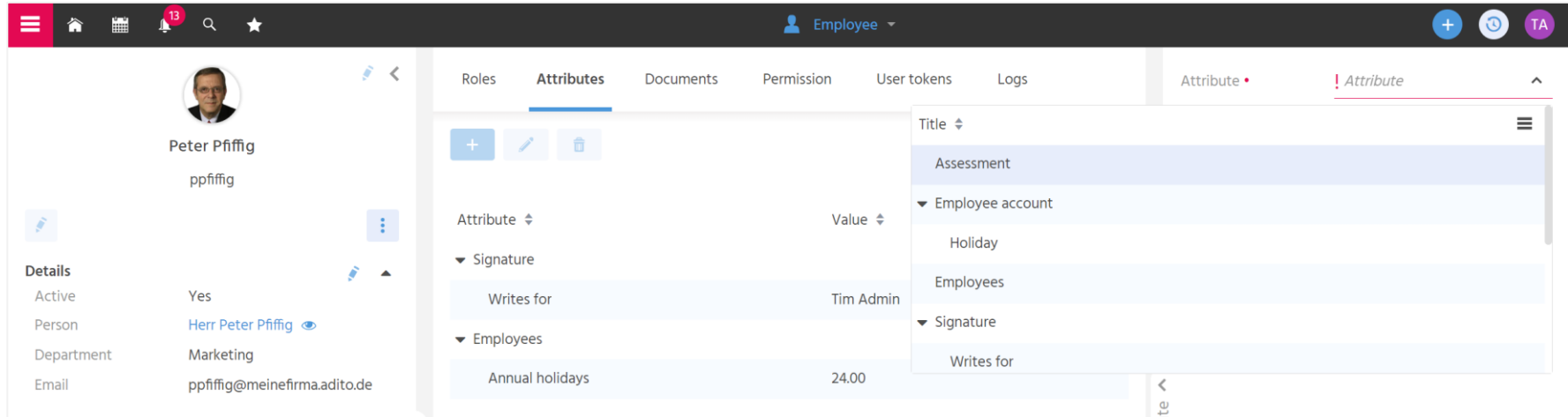
Employee | password

Change password as employee



Employee

Tab "Attributes"



The screenshot displays the ADITO Employee profile page for Peter Pfiffig. The 'Attributes' tab is selected, showing a table of attributes. A dropdown menu is open for the 'Attribute' column, listing various categories like Assessment, Employee account, Holiday, Employees, and Signature.

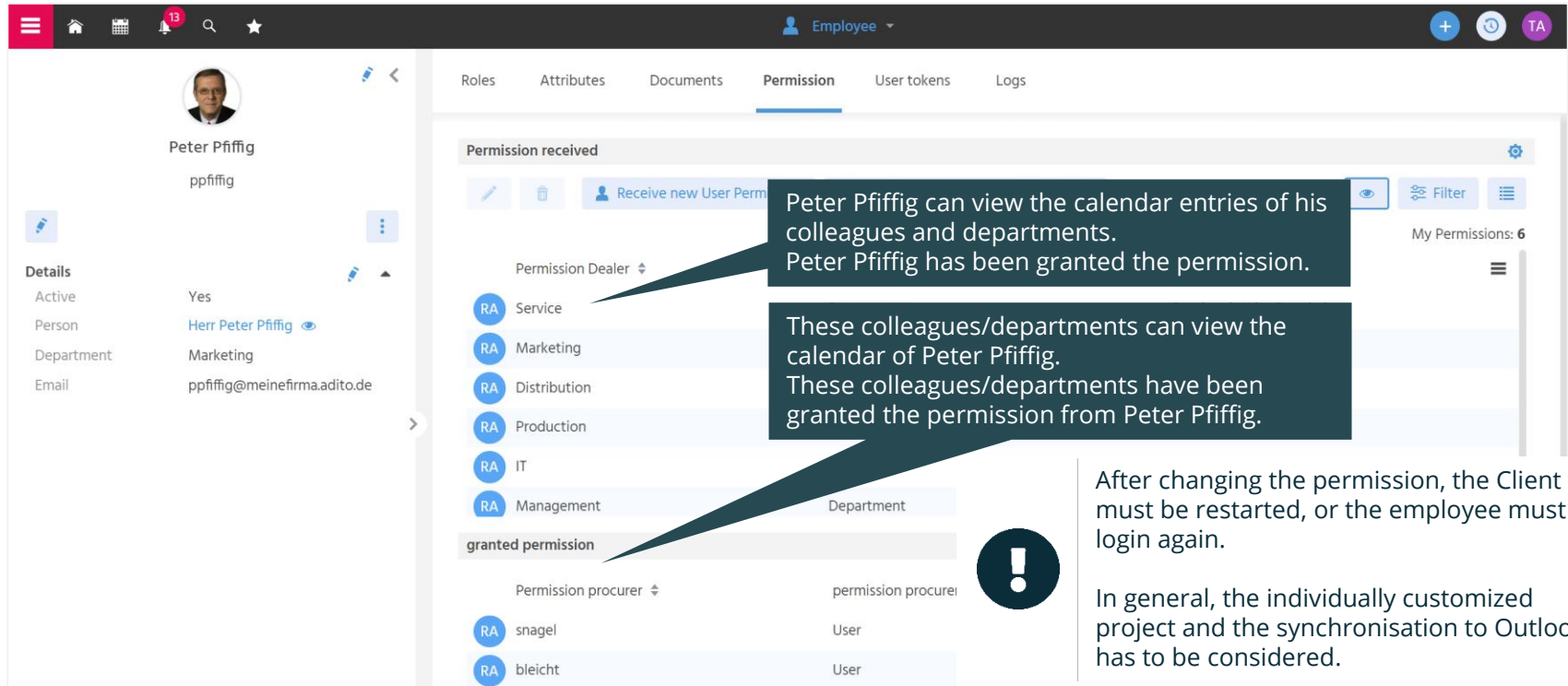
Attribute	Value
Signature	Writes for Tim Admin
Employees	Annual holidays 24.00



Ultimately, the individually customized project must always be considered here.

Employee

Calendar permission – Tab "Permission"



Employee

Calendar permission – Tab "Permission"

Permission received

Receive new User Perm

Permission Dealer

- RA Service
- RA Marketing
- RA Distribution
- RA Production
- RA IT
- RA Management

Department

granted permission

Permission procurer

- RA snagel
- RA bleicht

User

My Permissions: 6

Peter Pfiffig
ppiffig

Details

- Active: Yes
- Person: Herr Peter Pfiffig
- Department: Marketing
- Email: ppiffig@meinefirma.adito.de

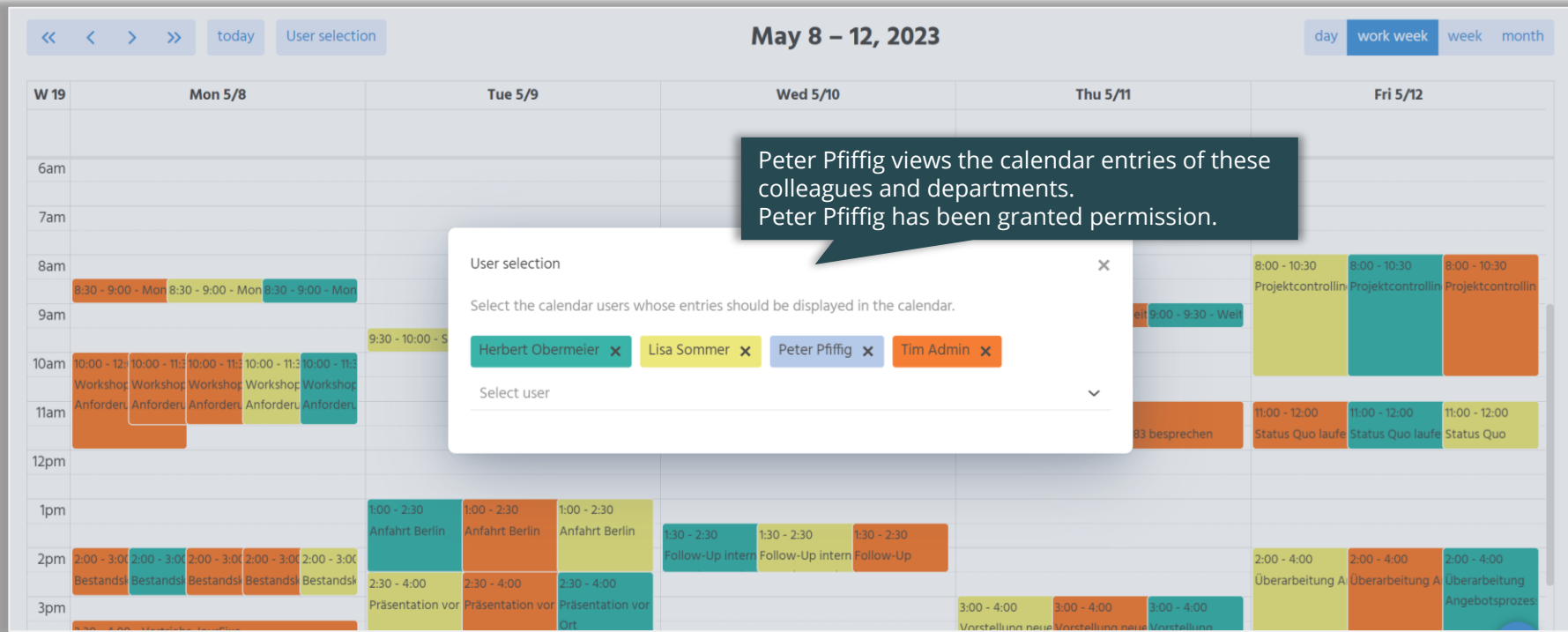
Peter Pfiffig can view the calendar entries of his colleagues and departments. Peter Pfiffig has been granted the permission.

These colleagues/departments can view the calendar of Peter Pfiffig. These colleagues/departments have been granted the permission from Peter Pfiffig.

After changing the permission, the Client must be restarted, or the employee must login again.

In general, the individually customized project and the synchronisation to Outlook has to be considered.

Calendar permission



Employee

User Tokens

Employee - Peter Pffiffig

Roles Attributes Documents Permission **User tokens** Logs

Filter

User tokens: 1

Valid	Valid from	Valid to	Group	Token
✓	Jul 9, 2024, 9:31 AM	Aug 8, 2024, 9:31 AM	#rememberme	c9d161df-0c05-49ef-8343-1a99409ea5ca

Details

Active Yes

Person [Herr Peter Pffiffig](#)

Department Marketing

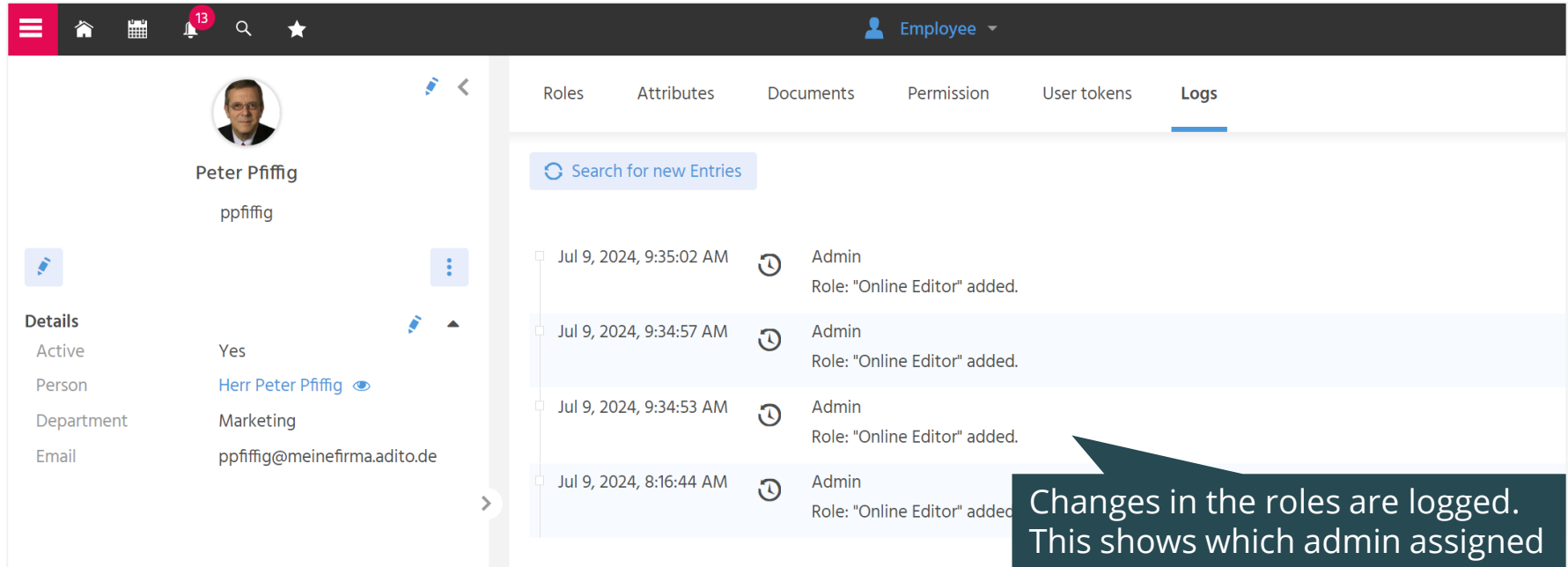
Email ppffiffig@meinefirma.adito.de

Overview of Tokens of a user.

- **Remain signed in**
Are *created* as soon as user signs in with "remained signed in".
Are *deleted*, as soon as user signs out.
- **Login Token**
Are created by the admin with new creation. Access through Token is no longer possible, if **invalid** or **timeframe expired**. Access Web-Client through Token:
`https://localhost:8443/client/?tokenId=`
Functionality has to be activated in Client Configurations.

Employee

Tab "Logs"



The screenshot shows the ADITO Employee profile page for Peter Pfiffig. The 'Logs' tab is selected, displaying a list of role assignment events. A callout box highlights that changes in roles are logged, showing which admin assigned or deleted a role and when.

Timestamp	Admin	Action
Jul 9, 2024, 9:35:02 AM	Admin	Role: "Online Editor" added.
Jul 9, 2024, 9:34:57 AM	Admin	Role: "Online Editor" added.
Jul 9, 2024, 9:34:53 AM	Admin	Role: "Online Editor" added.
Jul 9, 2024, 8:16:44 AM	Admin	Role: "Online Editor" added.

Employee

Set to inactive

- Administrator sets the indicator "Active" to inactive in the employee data record.
- The employee receives the message "LoginFailed: Account expired" the next time they try to sign in

Roles & Permissions



Role-dependent possibilities in ADITO

What can be mapped with roles?

The **structure of the Global Menu** can be mapped depending on the role.

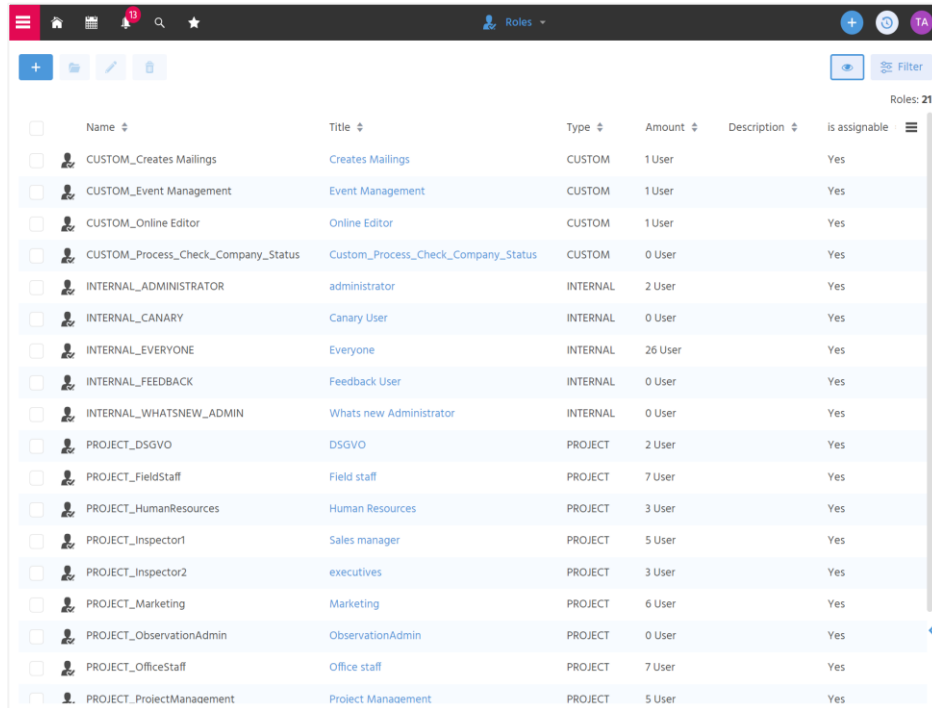
Permissions can be mapped depending on the role. I.e. the display of Entitys, fields or buttons, as well as the editing, etc. of data records.



Role

"Overview" of Roles

Context "Roles" – FilterView

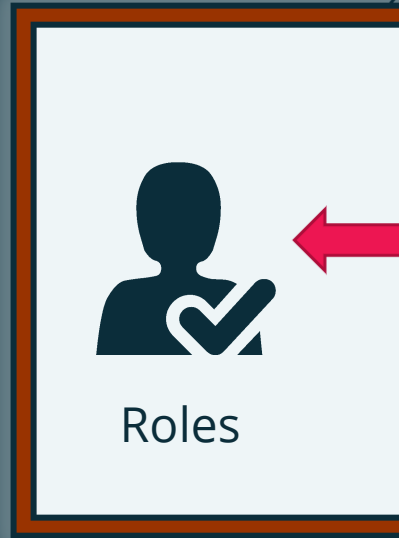


The screenshot shows the ADITO Roles FilterView interface. At the top, there is a navigation bar with icons for home, roles, and a search icon. Below the navigation bar, there is a toolbar with icons for adding, editing, and deleting roles. The main area displays a table of roles with columns for Name, Title, Type, Amount, Description, and is assignable. The table lists 21 roles, including CUSTOM_Creates Mailings, CUSTOM_Event Management, CUSTOM_Online Editor, CUSTOM_Process_Check_Company_Status, INTERNAL_ADMINISTRATOR, INTERNAL_CANARY, INTERNAL_EVERYONE, INTERNAL_FEEDBACK, INTERNAL_WHATSNEW_ADMIN, PROJECT_DSGVO, PROJECT_FieldStaff, PROJECT_HumanResources, PROJECT_Inspector1, PROJECT_Inspector2, PROJECT_Marketing, PROJECT_ObservationAdmin, PROJECT_OfficeStaff, and PROJECT_ProjectManagement. The table is filtered to show 21 roles.

Name	Title	Type	Amount	Description	is assignable
CUSTOM_Creates Mailings	Creates Mailings	CUSTOM	1 User		Yes
CUSTOM_Event Management	Event Management	CUSTOM	1 User		Yes
CUSTOM_Online Editor	Online Editor	CUSTOM	1 User		Yes
CUSTOM_Process_Check_Company_Status	Custom_Process_Check_Company_Status	CUSTOM	0 User		Yes
INTERNAL_ADMINISTRATOR	administrator	INTERNAL	2 User		Yes
INTERNAL_CANARY	Canary User	INTERNAL	0 User		Yes
INTERNAL_EVERYONE	Everyone	INTERNAL	26 User		Yes
INTERNAL_FEEDBACK	Feedback User	INTERNAL	0 User		Yes
INTERNAL_WHATSNEW_ADMIN	Whats new Administrator	INTERNAL	0 User		Yes
PROJECT_DSGVO	DSGVO	PROJECT	2 User		Yes
PROJECT_FieldStaff	Field staff	PROJECT	7 User		Yes
PROJECT_HumanResources	Human Resources	PROJECT	3 User		Yes
PROJECT_Inspector1	Sales manager	PROJECT	5 User		Yes
PROJECT_Inspector2	executives	PROJECT	3 User		Yes
PROJECT_Marketing	Marketing	PROJECT	6 User		Yes
PROJECT_ObservationAdmin	ObservationAdmin	PROJECT	0 User		Yes
PROJECT_OfficeStaff	Office staff	PROJECT	7 User		Yes
PROJECT_ProjectManagement	Project Management	PROJECT	5 User		Yes

- In the FilterView you receive an overview over all roles, which are available in the system and can be assigned to the employees.
- With the **"Create new" button** you create new roles of the type CUSTOM.
- Delete roles of the type CUSTOM.
- Open the main view of a role to configure the [permissions](#).
- [Further information to the type.](#)
- [Further information to the tag "Can be assigned", for the configuration of role groups.](#)

Role types



CUSTOM_Roles

- Are created in the ADITO Web-Client.



INTERNAL_Roles

- Are supplied by the ADITO core.
- INTERNAL_EVERYONE, INTERNAL_ADMINISTRATOR
- Can be used for the structuring of the menu.

PROJECT_Roles

- Are created in the ADITO Designer.
- Can be used for the structuring of the menu.



The **authorization configuration** for **all role types** takes place in the Web Client.

Roles in the xRM



Roles that are available with the xRM: Type "Internal"

☐	Name	Title	Type	Amount	Description
☐	INTERNAL_ADMINISTRATOR	administrator	INTERNAL	2 User	
☐	INTERNAL_CANARY	Canary User	INTERNAL	0 User	
☐	INTERNAL_EVERYONE	Everyone	INTERNAL	24 User	
☐	INTERNAL_FEEDBACK	Feedback User	INTERNAL	0 User	
☐	INTERNAL_WHATSNEW_ADMIN	Whats new Administrator	INTERNAL	0 User	
☐	PROJECT_DSGVO	Data privacy agent	PROJECT	2 User	
☐	PROJECT_FieldStaff	Field staff	PROJECT	7 User	
☐	PROJECT_HumanResources	Human Resources	PROJECT	3 User	
☐	PROJECT_Inspector1	Sales manager	PROJECT	5 User	
☐	PROJECT_Inspector2	executives	PROJECT	3 User	
☐	PROJECT_Manager	Manager-Admin	PROJECT	1 User	
☐	PROJECT_Marketing	Marketing	PROJECT	6 User	
☐	PROJECT_ObservationAdmin	ObservationAdmin	PROJECT	0 User	
☐	PROJECT_OfficeStaff	Office staff	PROJECT	7 User	
☐	PROJECT_OUTLOOK_ADDIN	Outlook Addin	PROJECT	1 User	Role that is used for users of the outlook add in.
☐	PROJECT_ProjectManagement	Project Management	PROJECT	5 User	
☐	PROJECT_ServiceAdmin	Service-Admin	PROJECT	2 User	
☐	PROJECT_ServiceAgent	Serviceagent	PROJECT	8 User	
☐	PROJECT_Workflow	Workflow management	PROJECT	0 User	

Roles of the type INTERNAL are set by ADITO and cannot be changed. They are used to map various basic rights/functions in the system.

- **INTERNAL_EVERYONE:** Roles that every user has in general (these are **not shown** in the tab "Roles" in the employee data record).
- **INTERNAL_ADMINISTRATOR:** Role with permission to access Entitys of Roles & Permission, Manager, sensitive attributes and the activity
- INTERNAL_CANARY: Role to test a new ADITO version, which is presented in a specific Canary area.
- INTERNAL_FEEDBACK, INTERNAL_WHATSNEW_ADMIN: (optional) Roles for the authorization of corresponding Contexts, if these are integrated in the system.



Roles in the xRM



Roles that are available with the xRM: Type "Project"

☐	Name	Title	Type	Amount	Description
☐	INTERNAL_ADMINISTRATOR	administrator	INTERNAL	2 User	
☐	INTERNAL_CANARY	Canary User	INTERNAL	0 User	
☐	INTERNAL_EVERYONE	Everyone	INTERNAL	24 User	
☐	INTERNAL_FEEDBACK	Feedback User	INTERNAL	0 User	
☐	INTERNAL_WHATSNEW_ADMIN	Whats new Administrator	INTERNAL	0 User	
☐	PROJECT_DSGVO	Data privacy agent	PROJECT	2 User	
☐	PROJECT_FieldStaff	Field staff	PROJECT	7 User	
☐	PROJECT_HumanResources	Human Resources	PROJECT	3 User	
☐	PROJECT_Inspector1	Sales manager	PROJECT	5 User	
☐	PROJECT_Inspector2	executives	PROJECT	3 User	
☐	PROJECT_Manager	Manager-Admin	PROJECT	1 User	
☐	PROJECT_Marketing	Marketing	PROJECT	6 User	
☐	PROJECT_ObservationAdmin	ObservationAdmin	PROJECT	0 User	
☐	PROJECT_OfficeStaff	Office staff	PROJECT	7 User	
☐	PROJECT_OUTLOOK_ADDIN	Outlook Addin	PROJECT	1 User	Role that is used for users of the outlook add in, T
☐	PROJECT_ProjectManagement	Project Management	PROJECT	5 User	
☐	PROJECT_ServiceAdmin	Service-Admin	PROJECT	2 User	
☐	PROJECT_ServiceAgent	Serviceagent	PROJECT	8 User	
☐	PROJECT_Workflow	Workflow management	PROJECT	0 User	

The roles "Field staff", "Human Resources", "executives" etc. are to be considered as examples and are partly assigned to different menu groups in the Designer.

Regarding the roles of the type "Project", ultimately, the individual implementation in the project must always be considered.

Users with the role of "Data privacy agent" can manage deletion indicators and define data protection-related attributes in the "Data protection administration" Context.

Users with the role "ObservationAdmin" can set Observations for others and activate email notifications for them.

To use the Outlook add-in, users need the "Outlook Addin" role, together with the "INTERNAL_Webservice" role.

Role that is assigned to the Contexts of the Service Administration

Role in relation to access to the Workflow Modeler



Roles in the xRM



Roles that are available with the xRM: PROJECT_Manager

Entity	Role	View	Create	Read	Update	Delete
Database_entity	PROJECT_Manager	●	●	●	●	●
DatabaseDetails_entity	PROJECT_Manager	●	●	●	●	●
ManagerUsers_entity	PROJECT_Manager	●	●	●	●	●
Peers_entity	PROJECT_Manager	●	●	●	●	●
Process_entity	PROJECT_Manager	●	●	●	●	●
ProcessExecution_entity	PROJECT_Manager	●	●	●	●	●
ProcessHistory_entity	PROJECT_Manager	●	●	●	●	●
ProcessInterval_entity	PROJECT_Manager	●	●	●	●	●
Server_entity	PROJECT_Manager	●	●	●	●	●
ServerDrainMode_entity	PROJECT_Manager	●	●	●	●	●
ServerService_entity	PROJECT_Manager	●	●	●	●	●
ServerStatistics_entity	PROJECT_Manager	●	●	●	●	●
ServerVMProperties_entity	PROJECT_Manager	●	●	●	●	●
Session_entity	PROJECT_Manager	●	●	●	●	●
SessionMessage_entity	PROJECT_Manager	●	●	●	●	●

The authorizations for the “Manager” menu group are mapped in the PROJECT_Manager role.

This role must be assigned to the users who are to have access to the manager.

In the xRM demo data, Tim Admin was assigned this role, so he can see the menu group.



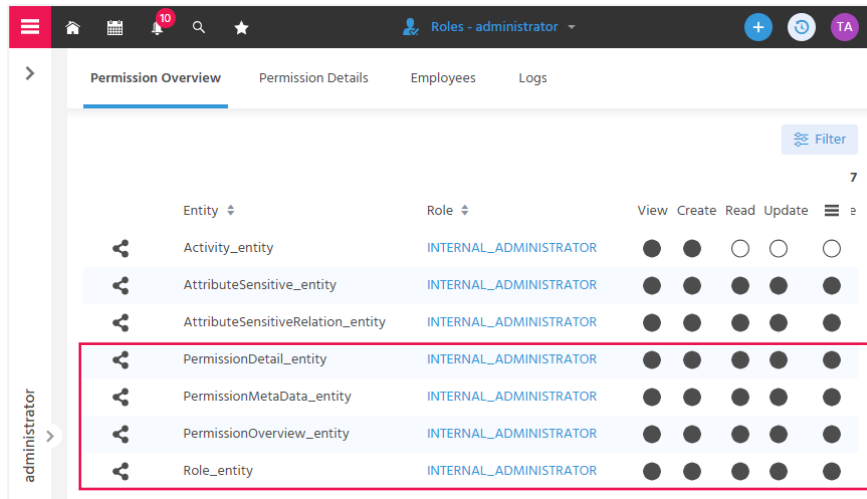
Manager

Session, Server, Process, Process history, Database, Peer



Roles in the xRM

Special role of administrator: Pre-defined basic setting for permissions



Entity	Role	View	Create	Read	Update
Activity_entity	INTERNAL_ADMINISTRATOR	●	●	○	○
AttributeSensitive_entity	INTERNAL_ADMINISTRATOR	●	●	●	●
AttributeSensitiveRelation_entity	INTERNAL_ADMINISTRATOR	●	●	●	●
PermissionDetail_entity	INTERNAL_ADMINISTRATOR	●	●	●	●
PermissionMetaData_entity	INTERNAL_ADMINISTRATOR	●	●	●	●
PermissionOverview_entity	INTERNAL_ADMINISTRATOR	●	●	●	●
Role_entity	INTERNAL_ADMINISTRATOR	●	●	●	●

The administrator (INTERNAL_Administrator) has the permission to the **Permission Entitys** in the Client. Those are:

- Roles & Permission (Access to the Contexts through the Global Menu)
- Permission overview & Permission Detail (Tabs in the Contexts Roles & Permission)

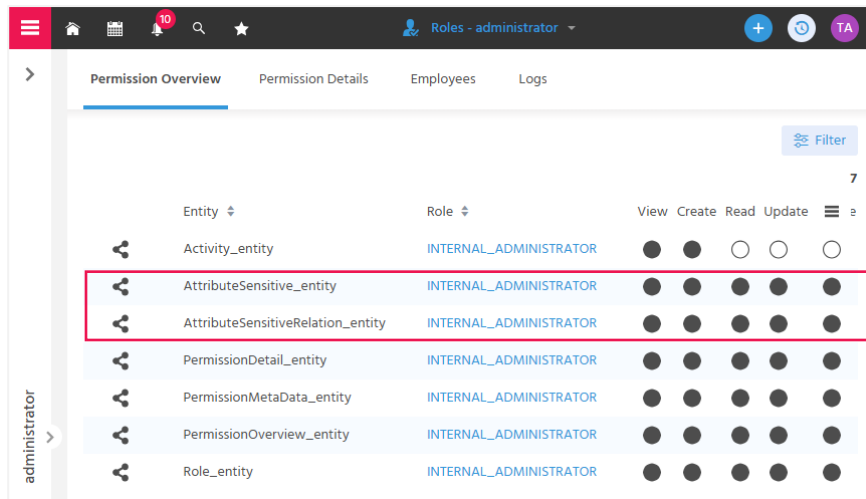
This ensures that only the administrator has access to it in the project and can assign permissions accordingly.



ATTENTION: As an administrator, you must make sure that you do not remove the “usePermission” property from the permission entities, as otherwise all users would be authorized to do so.

Roles in the xRM

Special role of administrator: Pre-defined permissions with regard to sensitive attributes



Entity	Role	View	Create	Read	Update
Activity_entity	INTERNAL_ADMINISTRATOR	●	●	○	○
AttributeSensitive_entity	INTERNAL_ADMINISTRATOR	●	●	●	●
AttributeSensitiveRelation_entity	INTERNAL_ADMINISTRATOR	●	●	●	●
PermissionDetail_entity	INTERNAL_ADMINISTRATOR	●	●	●	●
PermissionMetaData_entity	INTERNAL_ADMINISTRATOR	●	●	●	●
PermissionOverview_entity	INTERNAL_ADMINISTRATOR	●	●	●	●
Role_entity	INTERNAL_ADMINISTRATOR	●	●	●	●

The administrator (INTERNAL_Administrator) has permission to access the Entitys in order to **record sensitive attributes in the Client**. These are:

- The table "sensitive Attributes" (Tab "Attributes" in Company) AttributeSensitiveRelation_entity)
- The dropdown for sensitive attributes (Attribute for sensitive attributes) (AttributeSensitive_entity)

This defines in the project that first the admin has access to it and can, if necessary, create and permit further roles for sensitive attributes.

Roles in the xRM



Special role of administrator: Pre-defined permissions with regard to activities

Entity	Role	View	Create	Read	Update
Activity_entity	INTERNAL_ADMINISTRATOR	●	●	○	○
AttributeSensitive_entity	INTERNAL_ADMINISTRATOR	●	●	●	●
AttributeSensitiveRelation_entity	INTERNAL_ADMINISTRATOR	●	●	●	●
PermissionDetail_entity	INTERNAL_ADMINISTRATOR	●	●	●	●
PermissionMetaData_entity	INTERNAL_ADMINISTRATOR	●	●	●	●
PermissionOverview_entity	INTERNAL_ADMINISTRATOR	●	●	●	●
Role_entity	INTERNAL_ADMINISTRATOR	●	●	●	●

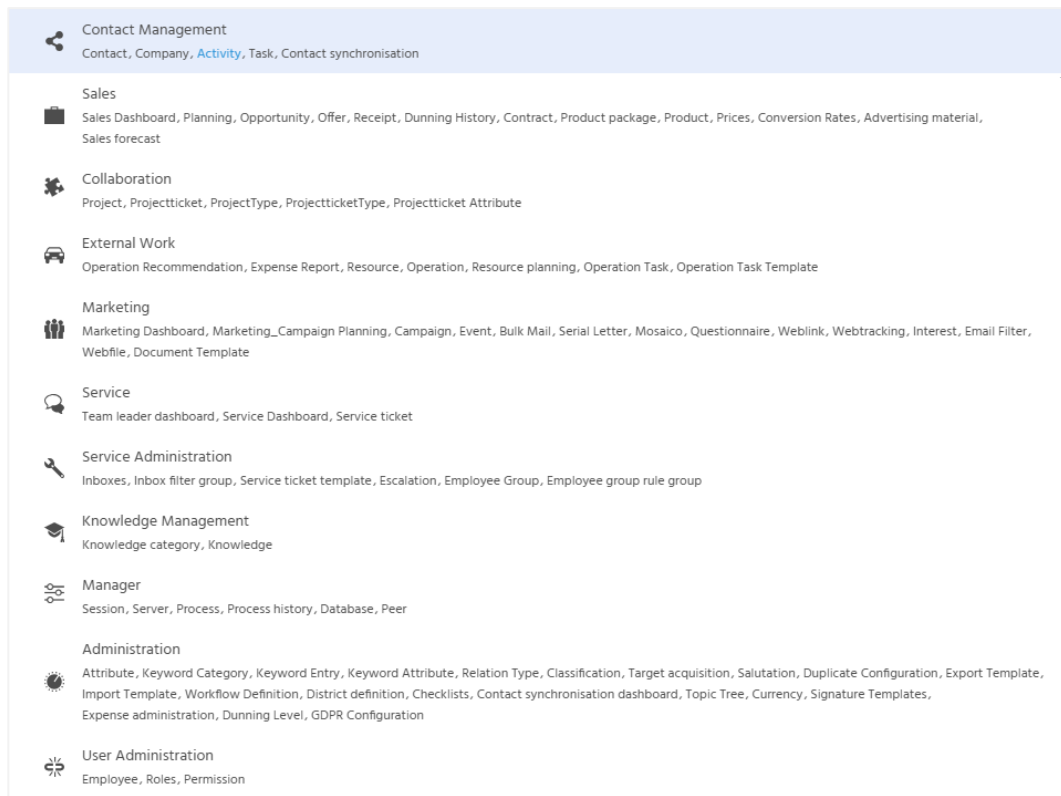
The administrator (INTERNAL_Administrator) has permission to the Activity-Entity, in order to edit or delete **Activities in the category "System"**.

These activities are created by the System and cannot be edited by somebody with the role "EVERYONE" (INTERNAL_Everyone). This is set in the permissions of both roles as a condition of the rights.

Entity	Role	View	Create	Read	Update
Activity_entity	INTERNAL_EVERYONE	●	●	●	○



Structure of the Global Menu

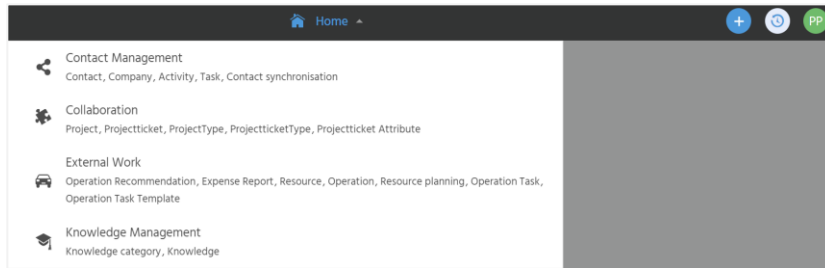


Example: Division/Grouping of all possible Contexts in the Global Menu

- What does EVERYONE have to view?
- What does only the Administrator need?
- What is required within the departments?
- What is required for special processes?

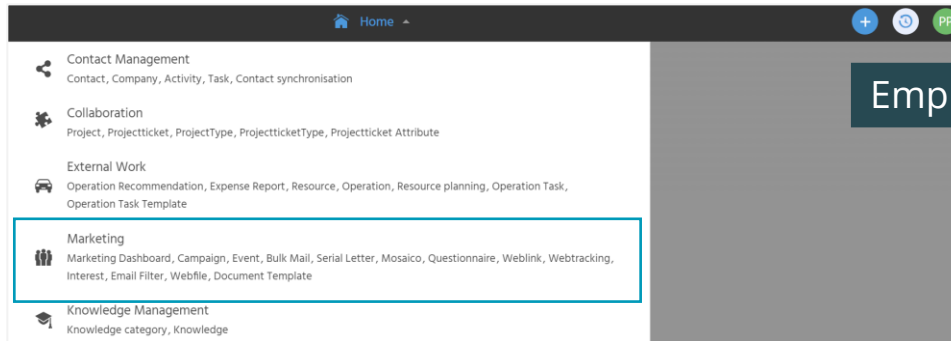
Structure of the Global Menu

Example



Employee has the role EVERYONE.

These menu groups are assigned to the role EVERYONE in the ADITO xRM.



Employee has the roles EVERYONE and Marketing.

The menu group "Marketing" and its Contexts in ADITO xRM are assigned to the role Marketing.

Structure of the Global Menu

Procedure

In the application model, you define the menu structure of the global menu that a user sees based on their roles. You can use roles of the type INTERNAL or PROJECT for this.

The roles are assigned to the menu groups. A menu group can also contain only individual contexts (see next slide).

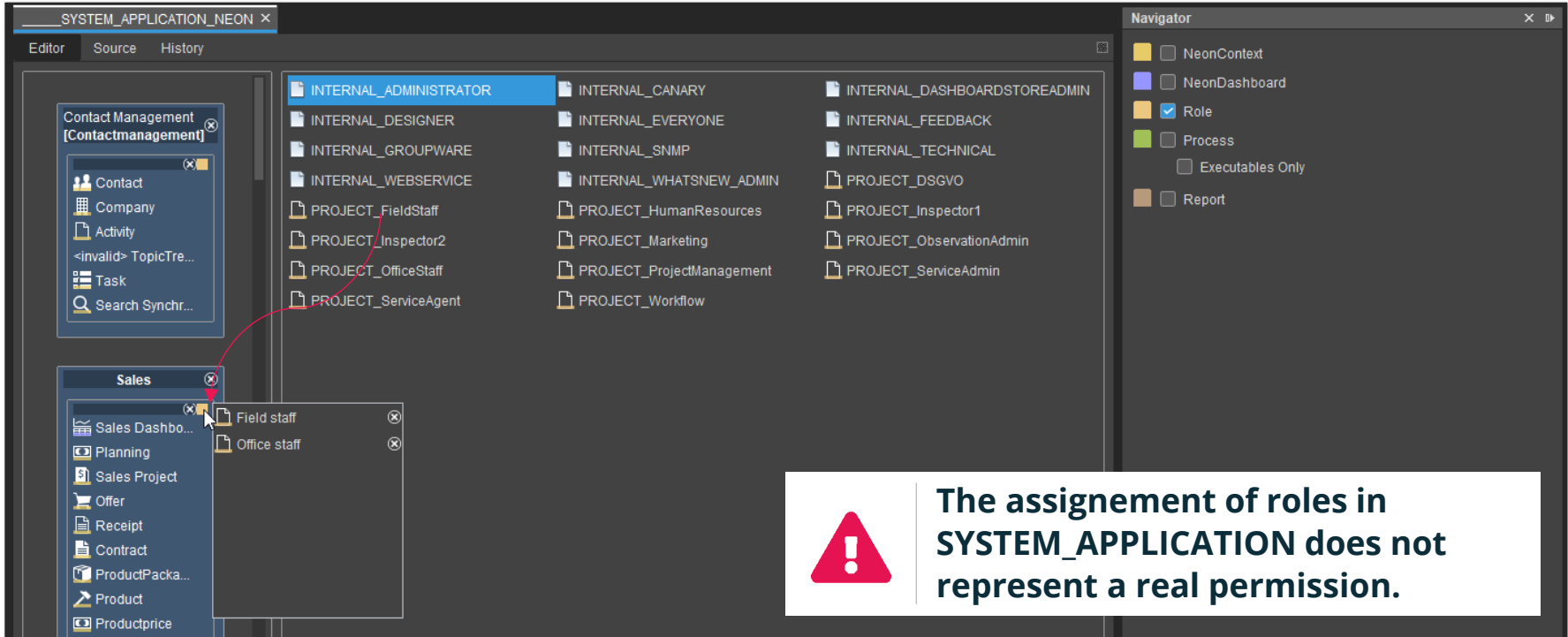


The general procedure for creating and assigning roles in the Designer can be found in the Customizing Manual.

However, it is also possible to use only the “Everyone” role in the application model and assign it to all menu groups. This allows you to customize the global menu structure using the CUSTOM roles in the authorization management in the web client.

Structure of the Global Menu

Roles can be assigned to menu groups using Drag&Drop

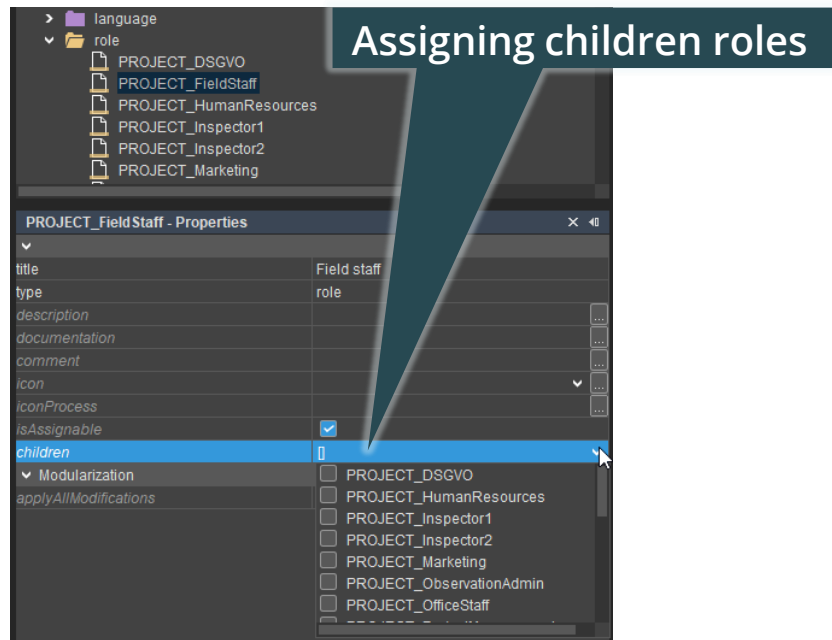
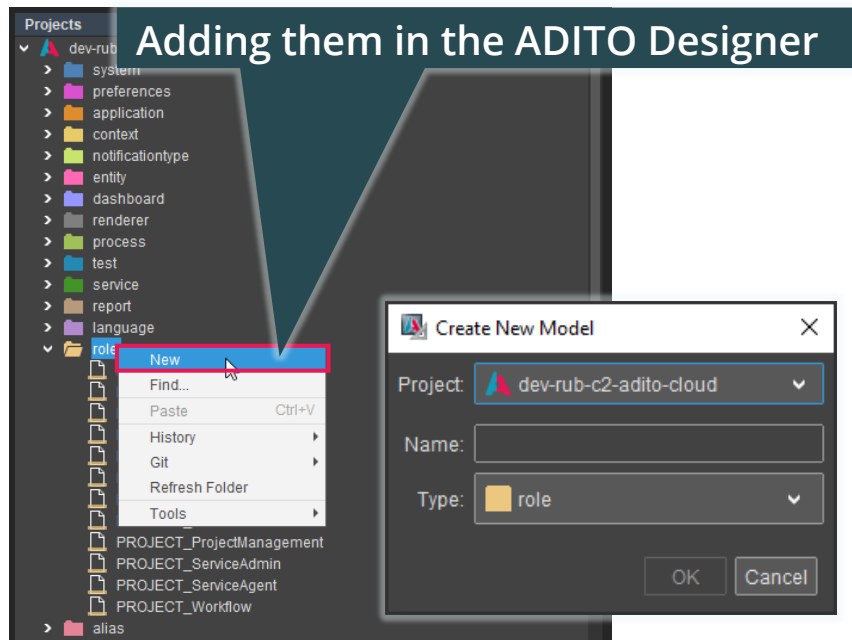


The screenshot displays the 'SYSTEM_APPLICATION_NEON' application interface. On the left, a 'Contact Management' menu is expanded, showing options like 'Contact', 'Company', 'Activity', 'Task', and 'Search Synchron...'. Below it, a 'Sales' menu is also expanded, showing options like 'Sales Dashbo...', 'Planning', 'Sales Project', 'Offer', 'Receipt', 'Contract', 'ProductPacka...', 'Product', and 'Productprice'. A red arrow points from the 'Sales' menu to a 'Field staff' and 'Office staff' sub-menu. The main area shows a list of menu groups, including 'INTERNAL_ADMINISTRATOR', 'INTERNAL_CANARY', 'INTERNAL_DASHBOARDSTOREADMIN', 'INTERNAL_DESIGNER', 'INTERNAL_EVERYONE', 'INTERNAL_FEEDBACK', 'INTERNAL_GROUPWARE', 'INTERNAL_SNM', 'INTERNAL_TECHNICAL', 'INTERNAL_WEBSERVICE', 'INTERNAL_WHATSNEW_ADMIN', 'PROJECT_DSGVO', 'PROJECT_FieldStaff', 'PROJECT_HumanResources', 'PROJECT_Inspector1', 'PROJECT_Inspector2', 'PROJECT_Marketing', 'PROJECT_ObservationAdmin', 'PROJECT_OfficeStaff', 'PROJECT_ProjectManagement', 'PROJECT_ServiceAdmin', and 'PROJECT_Workflow'. On the right, a 'Navigator' panel shows a list of roles: 'NeonContext', 'NeonDashboard', 'Role' (checked), 'Process', 'Executables Only', and 'Report'. A red arrow points from the 'Role' checkbox to the 'Sales' menu.

The assignment of roles in SYSTEM_APPLICATION does not represent a real permission.

PROJECT_Roles

You can create this type **in the designer** within the project, and it is thus also saved in the Git project. These roles can be assigned to the respective menu groups (contact management, sales, marketing, etc.) in the application model in the designer and used to define the menu structure. In addition, it would be possible to use them in the JDito code if necessary.



What can roles represent?

Roles can...

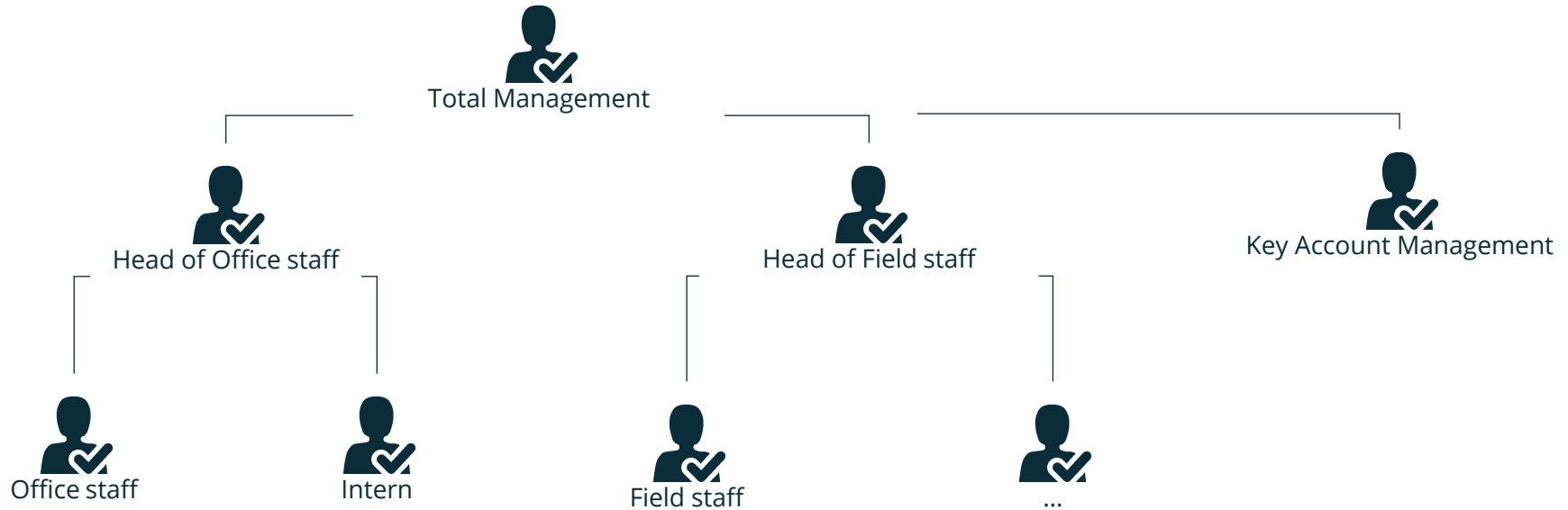
- Represent **personas**, which present the roles of the employees (Role groups*).
- Represent **processes**, which Personas can perform (Role groups*).
- Represent **functions** and **filter**, which are required for the performance of these processes.

*Why are we talking about role groups?

Personas and process roles are also referred to as role groups because their permissions are not directly linked, but they only receive their rights through a group of child roles. However, it is also possible to group the function or filter roles in the persona role without using process roles.

What can roles represent?

Personas in Organizational charts, e.g. Sales department



What can roles represent?

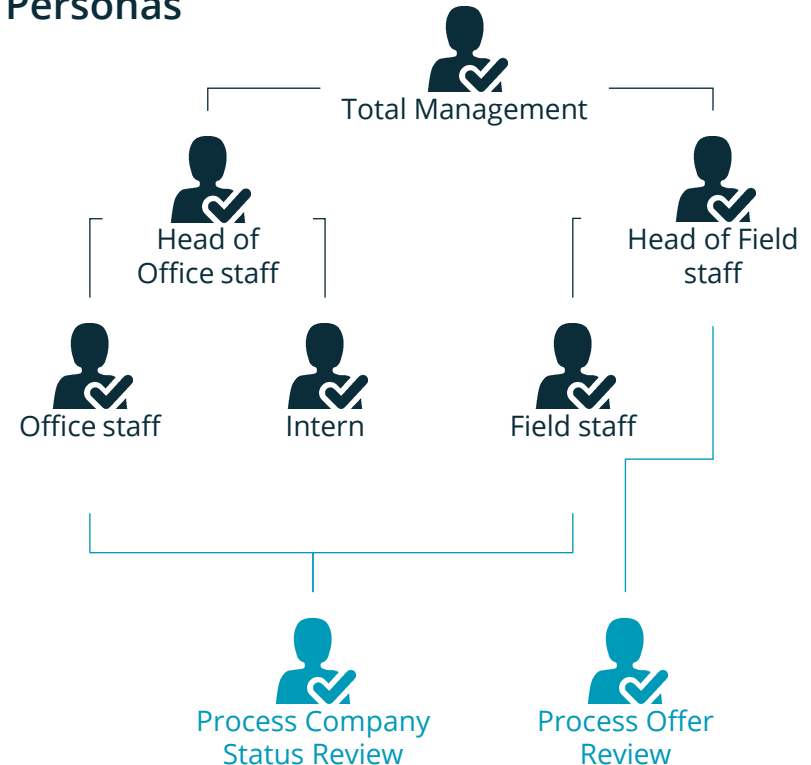
Processes (workflows), which are carried out by Personas

Examples:

- Process Company Status Review
- Process Vacation approval
- Process Sales evaluation
- Process Sales planning
- Process Offer Review
- Process Product creation
- ...



The process roles are passed onto those Personas that should carry out the respective process.



What can roles represent?

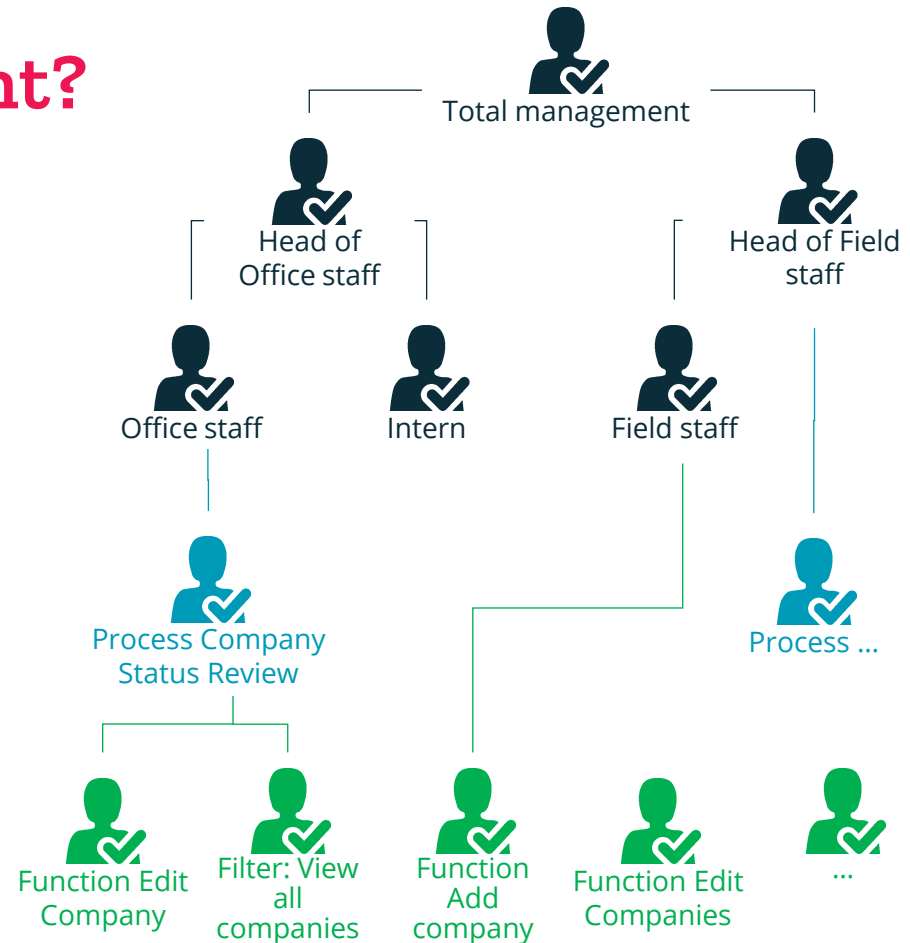
Functions and Filter

Example:

- Filter: view all companies
- Filter: view all companies from my region
- Function Add companies
- Function Edit companies
- Function Deleting companies
- Function view status
- Function Edit status
- ...



The function or filter roles are inherited by the process roles or personas.



CUSTOM_Roles

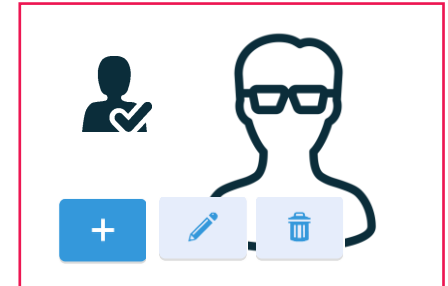
Add in ADITO Web-Client

The name is the unique key for the role and can therefore only be assigned once. It is automatically supplemented by the designation of the type.

The title is the name of the role that is displayed, for example, when the employee is assigned.

The indication "is assignable" must be activated, in order to assign this role to a different role as child role.

Name •	CUSTOM_Filter(see)_all_companies
Title •	Filter(see)_all_companies
Description	This role can see all companies.
is assignable	☒
Child Role	+ Child Role



How can roles be "passed on"?

Parent / child roles

Conditions:

- With the **Is assignable** indicator, a role is made available to others as a child role and can transfer its authorizations to the parent role.
 - CUSTOM roles can be used in the client as child roles and can be assigned CUSTOM, PROJECT or INTERNAL roles can be assigned.
 - PROJECT roles can be used as child roles in the Designer and assigned to them.
- The roles are linked with OR. **This means that they are not "inherited" but "stapled".**
 - This means that someone receives "virtually the maximum" of all authorizations that they receive via the roles.

Parent and subordinate roles

Assigning Child Roles in the Web-Client for CUSTOM roles

Edit View

Name • CUSTOM_Process_Company_Check_Status

Title • Process_Company_Check_Status

Description Description

Is assignable ☒

Child Role

- + CUSTOM_Function_Edit_Status
- CUSTOM_Function_See_Status
- CUSTOM_Function_Edit_Companies

Child Role

- CUSTOM_Creates Mailings
- CUSTOM_Event Management
- CUSTOM_Filter(see)_all_companies
- CUSTOM_Function_Edit_Companies
- CUSTOM_Function_Edit_Status
- CUSTOM_Function_See_Status

One or more roles (of the type CUSTOM, PROJECT or INTERNAL) can be added as child role in the PreviewView.

PreviewView



CUSTOM_Process_Check_Company_Status

Custom_Process_Check_Company_Status

0 User

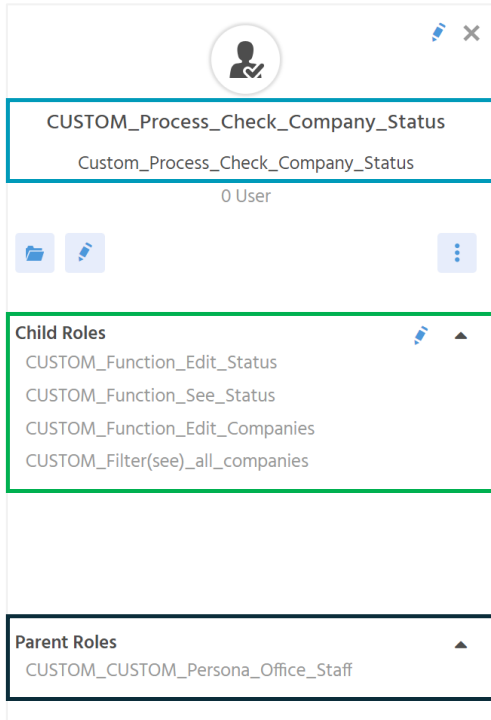
   

Child Roles

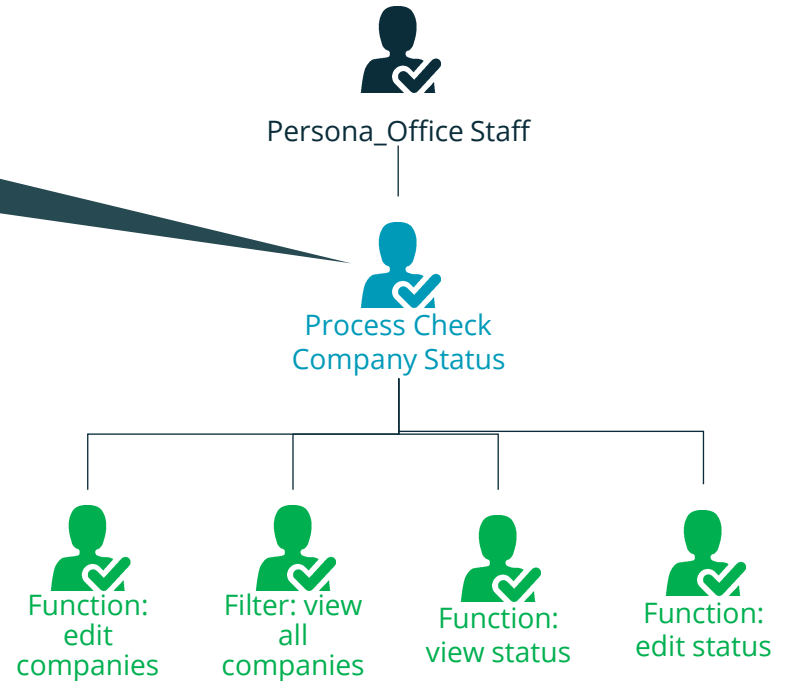
- + CUSTOM_Filter(see)_all_companies
- CUSTOM_Function_Edit_Status
- CUSTOM_Function_Edit_Companies
- CUSTOM_Function_See_Status

Parent and subordinate roles

Overview in the PreviewView

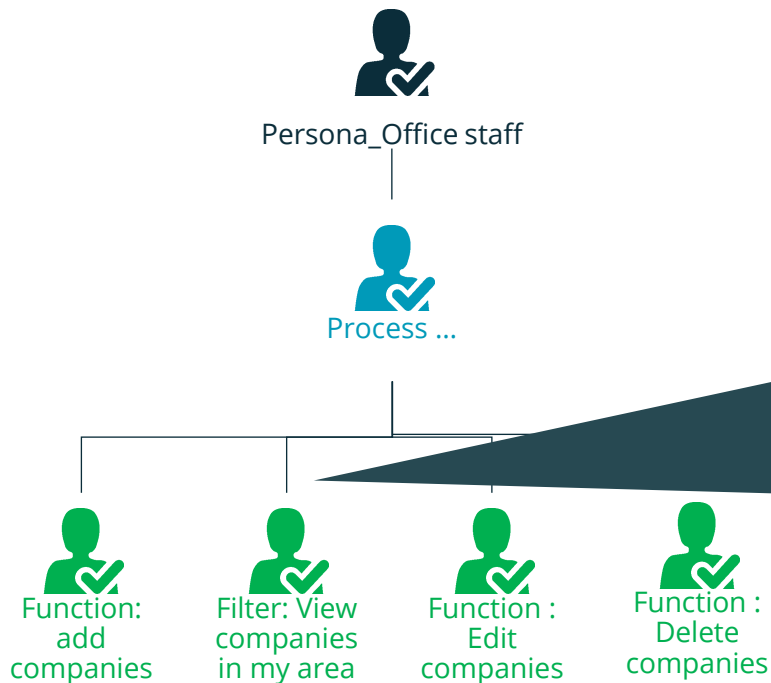


Perspective from
the view of the
"middle" role.



Parent and subordinate roles

Grouping of the roles

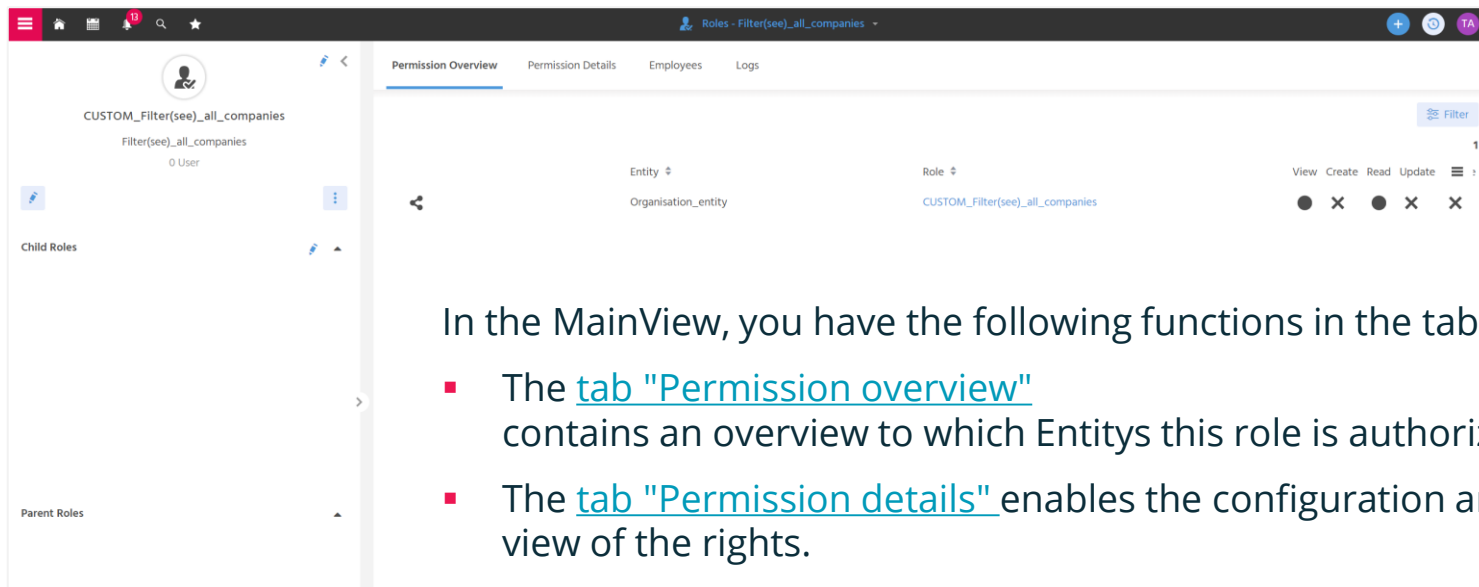


If a role group uses the restricted view of data records, the restriction can be waived for the Edit and Delete rights, unless other restriction conditions are required for these rights.

Example:
The role only views (READ) companies from the area assigned to it. This means that the UPDATE and DELETE rights do not need to be restricted by the condition, as the role can only edit or delete what it views

Context "Roles"

MainView



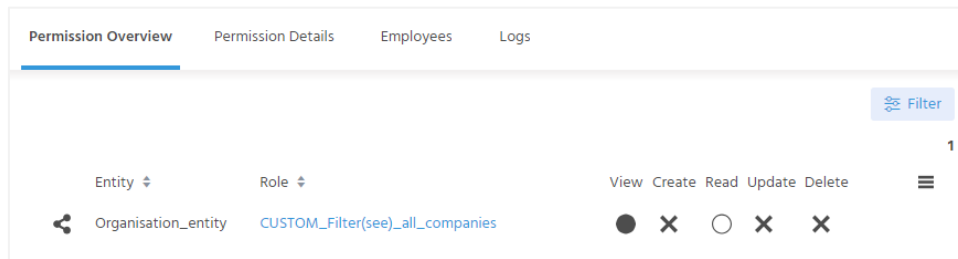
In the MainView, you have the following functions in the tabs:

- The [tab "Permission overview"](#) contains an overview to which Entitys this role is authorized to.
- The [tab "Permission details"](#) enables the configuration and the detailed view of the rights.
- The [tab "Employees"](#) offers an overview of all users assigned to this role.

Context "Roles"

Tab "Permission overview"

- In the columns VIEW and CREATE, the rights to the **Entity level** are displayed. Therefore, the display of views of the Entity are controlled, as well as the creation of new data records.
- The columns READ, UPDATE and DELETE concern the **data record level**. This controls which data records can be viewed, edited or deleted.
- By looking at the **icon**, you can check which **Permission status** has been assigned:
 - ● Circle (filled): is always allowed
 - ○ Kreis (empty): is limited allowed, i.e. a filter condition has been added
 - ✕ Cross: is never allowed



The screenshot shows the 'Permission Overview' tab in the ADITO application. It features a table with columns for Entity, Role, and a set of permissions (View, Create, Read, Update, Delete). The first row shows 'Organisation_entity' for the role 'CUSTOM_Filter(see)_all_companies'. The permissions are represented by icons: a filled circle for 'View' and 'Create', and a cross for 'Read', 'Update', and 'Delete'. A 'Filter' button is visible in the top right corner of the table area.

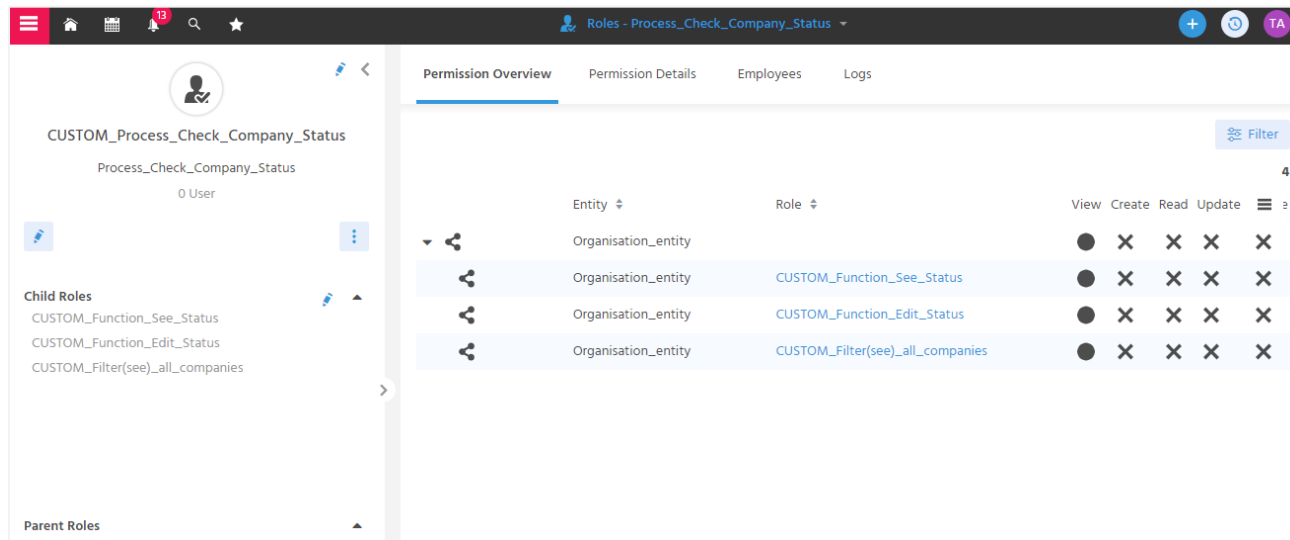
Entity	Role	View	Create	Read	Update	Delete
Organisation_entity	CUSTOM_Filter(see)_all_companies	●	●	✕	✕	✕

Context "Roles"

Tab "Permission overview"

In the MainView of a role with child roles, the individual roles and its permissions are displayed in the tab "Permission overview" in the form of a tree table.

The sum of the authorizations for the parental role can therefore be viewed in the first line.



The screenshot shows the 'Permission Overview' tab for the role 'CUSTOM_Process_Check_Company_Status'. The left sidebar displays a tree structure with the role name and its child roles: 'CUSTOM_Function_See_Status', 'CUSTOM_Function_Edit_Status', and 'CUSTOM_Filter(see)_all_companies'. The main area shows a table of permissions for the 'Organisation_entity' role.

Entity	Role	View	Create	Read	Update
Organisation_entity		●	×	×	×
Organisation_entity	CUSTOM_Function_See_Status	●	×	×	×
Organisation_entity	CUSTOM_Function_Edit_Status	●	×	×	×
Organisation_entity	CUSTOM_Filter(see)_all_companies	●	×	×	×



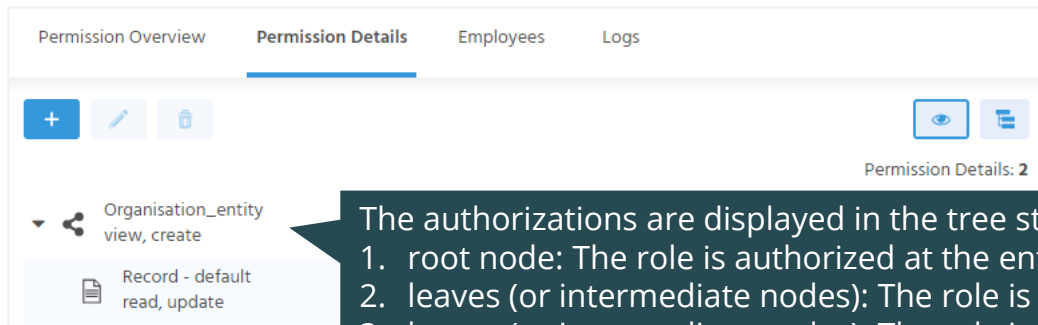
Child roles of child roles are not shown in the overview. This view only shows the direct connections of roles from the next level.

Context "Roles"

Tab "Permission Details"

The tab enables the **creation/editing** and the **detailed overview** of rights

- You can assign all rights at once by activating the "Complete Authorizations" checkbox.
- Or you can authorize step by step, first at the entity level, then at the data record level (possibly with filter conditions) and, if necessary, at individual fields or actions.



The authorizations are displayed in the tree structure:

1. root node: The role is authorized at the entity level.
2. leaves (or intermediate nodes): The role is authorized at the data record level.
3. leaves (or intermediate nodes): The role is authorized at the individual field or action level.

Further examples for the configuration of rights in the tab "Permission details" From the perspective of the Context "Permission" can be found on the next pages.

Context "Roles"

Tab "Employees"

In this tab, all employees, who were assigned this role, are listed.

Permission Overview Permission Details **Employees** Logs

 Observe Filter + Add to role

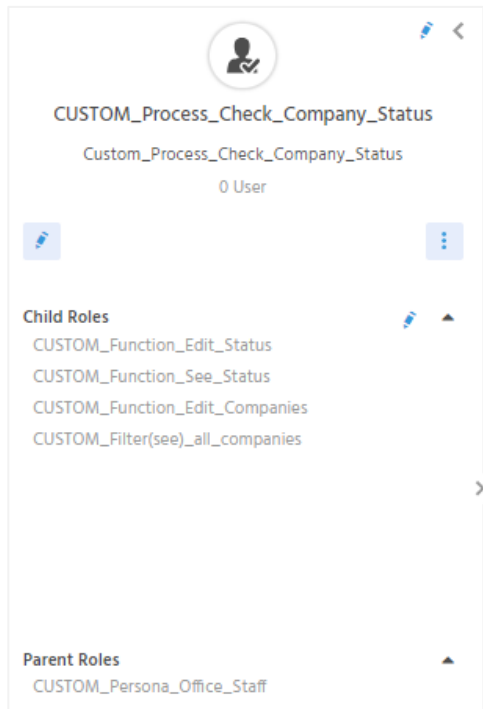
☐	Username ▾	Active ▾	Firstname ▾	Lastname ▾	
☐	 bleicht	Yes	Birgit	Leicht	Dis
☐	 hstorbeck	Yes	Heiko	Storbeck	Distribution / Office staff
☐	 mmustermann	Yes	Max	Mustermann	Management
☐	 slustig	Yes	Susanne	Lustig	Distribution / Office staff

By using the Action "Add to role", an employee can be assigned to this role in this specific tab.

To remove an employee of a role, select the employee. Instead of "Add to role", there is now the Action  "Delete from role" available.

Context "Roles"

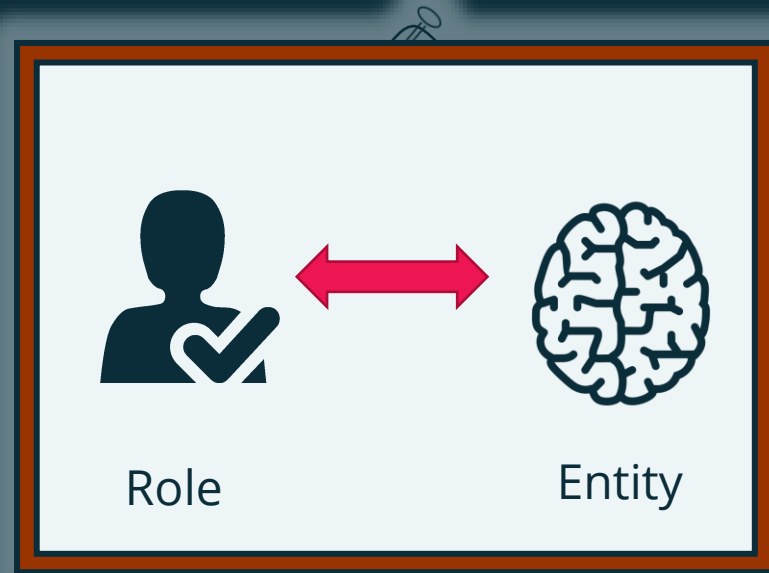
Preview



Here you can view:

- Name of the role
- Title of the role
- Number of users, who are assigned to it
- Description (if available)
- Overview of subordinate child roles
- Overview of parental roles

"Permission"



What is permitted/authorized?

Entities, Fields, Actions are authorized.



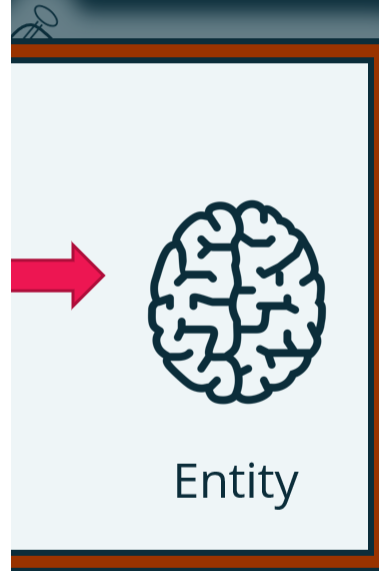
1. Introduction

ADITO is a comprehensive software framework that enables you to build powerful web-based xRM solutions, with xRM standing for "any relationship", not only the relationships to customers (CRM). An ADITO distribution includes the ADITO Designer, which is the main tool for creating new applications and modifying existing ones. Furthermore, ADITO comes with a project called xRM, which includes basic data structures to manage companies, contact persons, activities, sales-related elements (offers etc.), and many more. Besides, the xRM project also includes some example data, e.g., companies and contact persons.

The central programming paradigm of ADITO is the so-called "Neon Programming Model", which is based on the "Entity model". This concept means a strict separation of how data is

- structured and calculated ("Entities")
- stored ("RecordContainer") and
- displayed ("Views", clustered in "Contexts").

Excerpt from the Customizing Manual



The permission of an Entity controls if a role can view the Context in the Global Menu and which Data, Fields and Actions they can view and edit.

Permission

Activate

In the initial condition of ADITO xRM, **no permissions** are granted (with the exception of [Admin Permissions](#)).

Only when the property "usePermissions" is activated, all permissions are withdrawn and have to be assigned to the required roles.

This means, **everything – Entitys, Fields, Actions** – that is not marked with usePermissions in the Designer, is visible, modifiable and executable for every role.



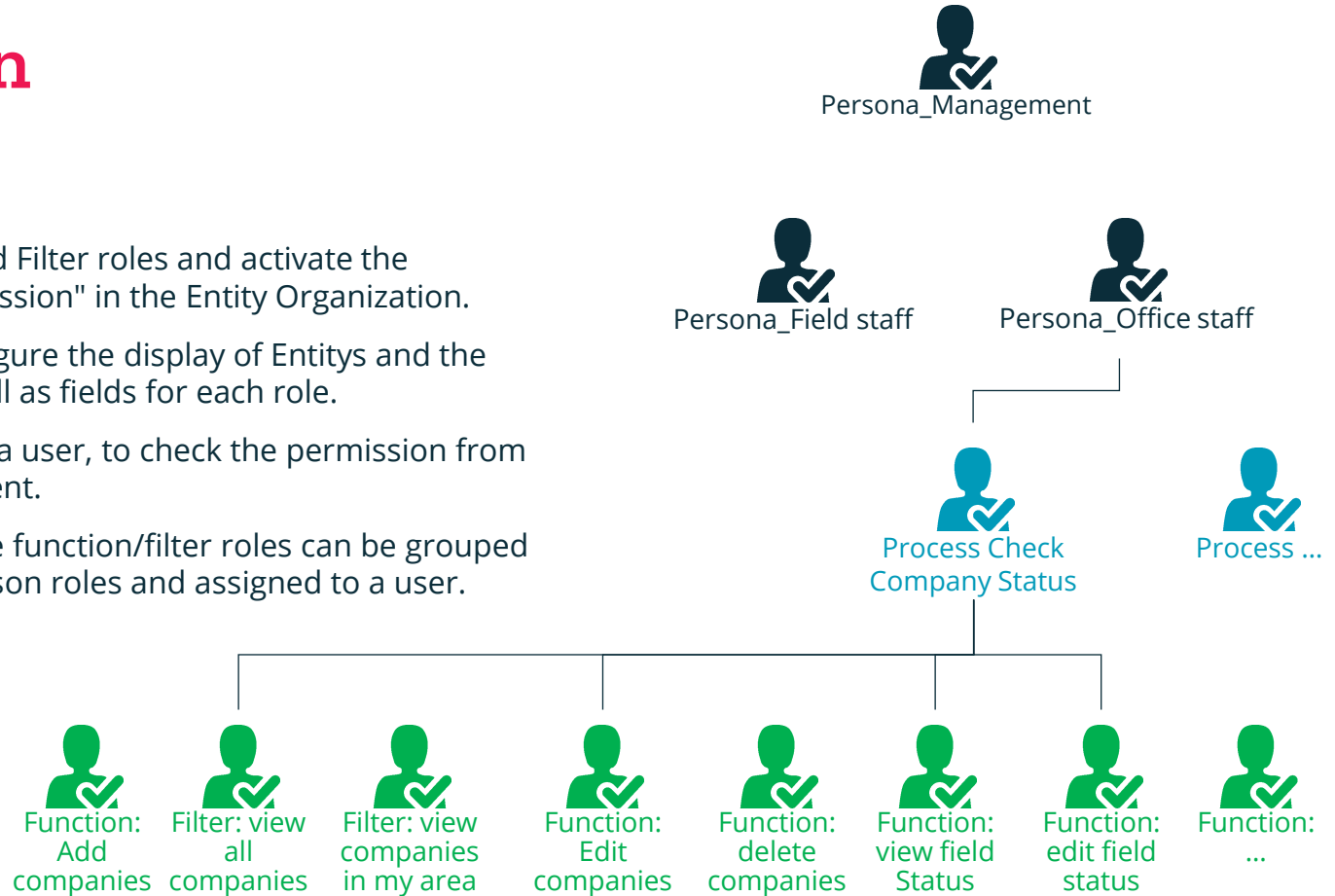
Please note that

- the activation of the property "usePermissions" is only possible in the ADITO Designer and
- the assignment of role-specific rights (role $\longleftrightarrow$ entity) only takes place in the ADITO web client.

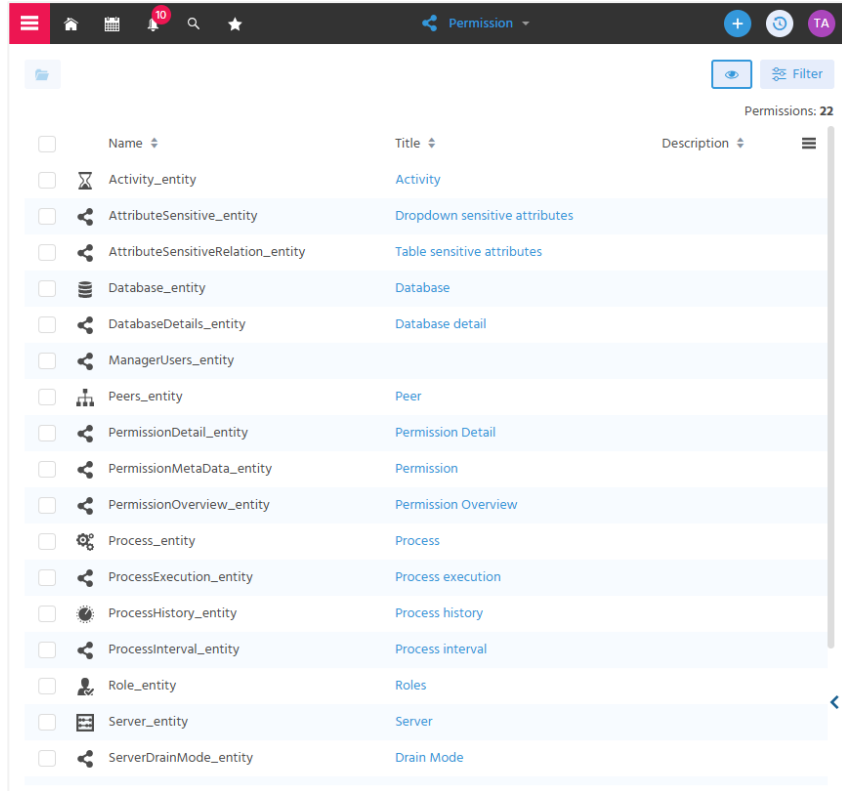
Permission

Example

1. Create Function and Filter roles and activate the property "usePermission" in the Entity Organization.
2. Permission to configure the display of Entities and the data records, as well as fields for each role.
3. Assign each role to a user, to check the permission from the user view in Client.
4. In the next step, the function/filter roles can be grouped into process or person roles and assigned to a user.



Authorizing Entitys



The screenshot shows the 'Permission' context in the ADITO Designer. It displays a list of 22 entities, each with a checkbox, a name, a title, and a description. The entities are listed in a table format with columns for Name, Title, and Description. The 'Permissions: 22' indicator is visible at the top right of the list.

	Name	Title	Description
☐	Activity_entity	Activity	
☐	AttributeSensitive_entity	Dropdown sensitive attributes	
☐	AttributeSensitiveRelation_entity	Table sensitive attributes	
☐	Database_entity	Database	
☐	DatabaseDetails_entity	Database detail	
☐	ManagerUsers_entity		
☐	Peers_entity	Peer	
☐	PermissionDetail_entity	Permission Detail	
☐	PermissionMetaData_entity	Permission	
☐	PermissionOverview_entity	Permission Overview	
☐	Process_entity	Process	
☐	ProcessExecution_entity	Process execution	
☐	ProcessHistory_entity	Process history	
☐	ProcessInterval_entity	Process interval	
☐	Role_entity	Roles	
☐	Server_entity	Server	
☐	ServerDrainMode_entity	Drain Mode	

The Context "Permission" provides an overview of all Entitys, whose permissions were activated.

For every Entity, which is listed here, the Property "usePermission" has been activated. Only after a role has been authorized, it can view the Context and work depending on the authorization.

The "Administrator" role has been authorized in xRM for the entities shown in the screenshot ([check "Special position of Administrator"](#)).

To display more Entitys in this list, the following steps are required in the Designer:



Authorizing Entitys

Possibility 1:

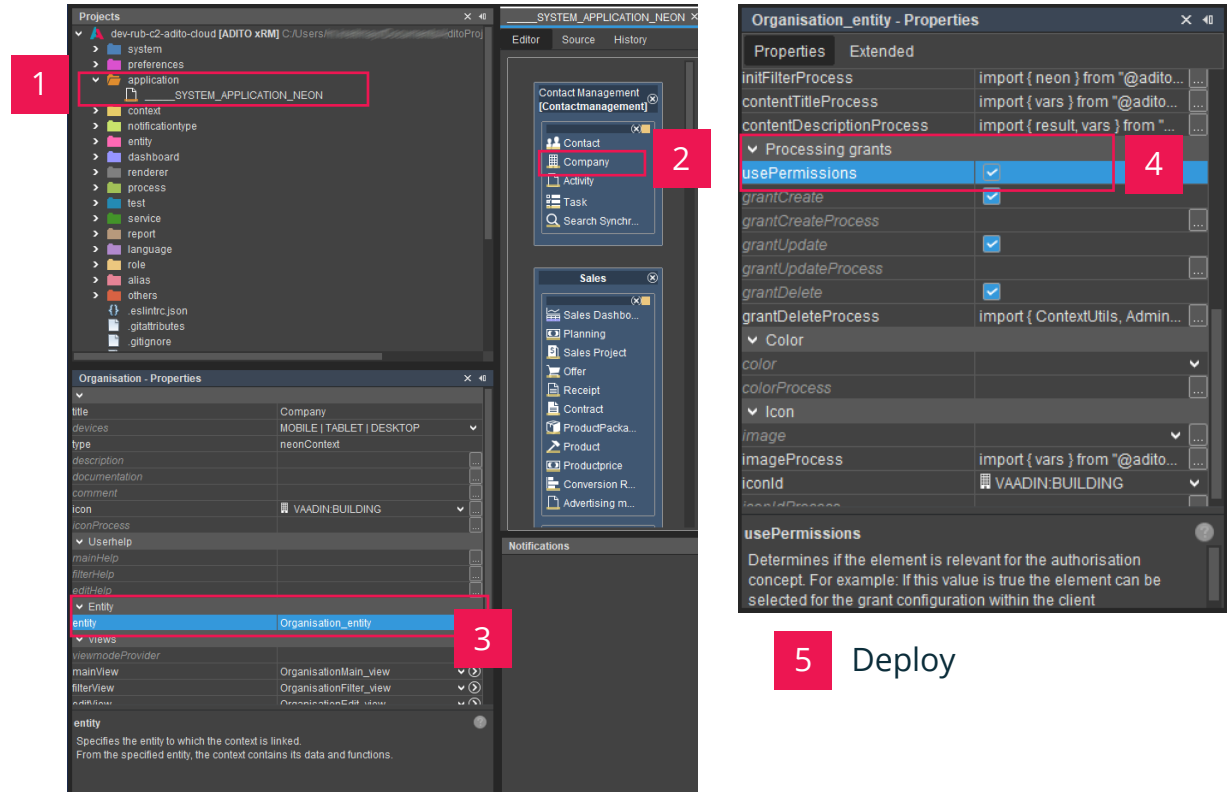
1. Access via _____SYSTEM_APPLICATION.
2. Search for Context Company
3. Open the connected Organisation_entitys
4. Open the Properties of the Entity
5. Activate usePermissions

Possibility 2:

Access through complete selection "context" in area Projects.
(Follow steps 3. – 5.)

Possibility 3:

Access through complete selection "entity" in the area Projects.
(Follow steps 4. und 5.)



1 Projects

2 Editor

3 Organisation - Properties

4 usePermissions

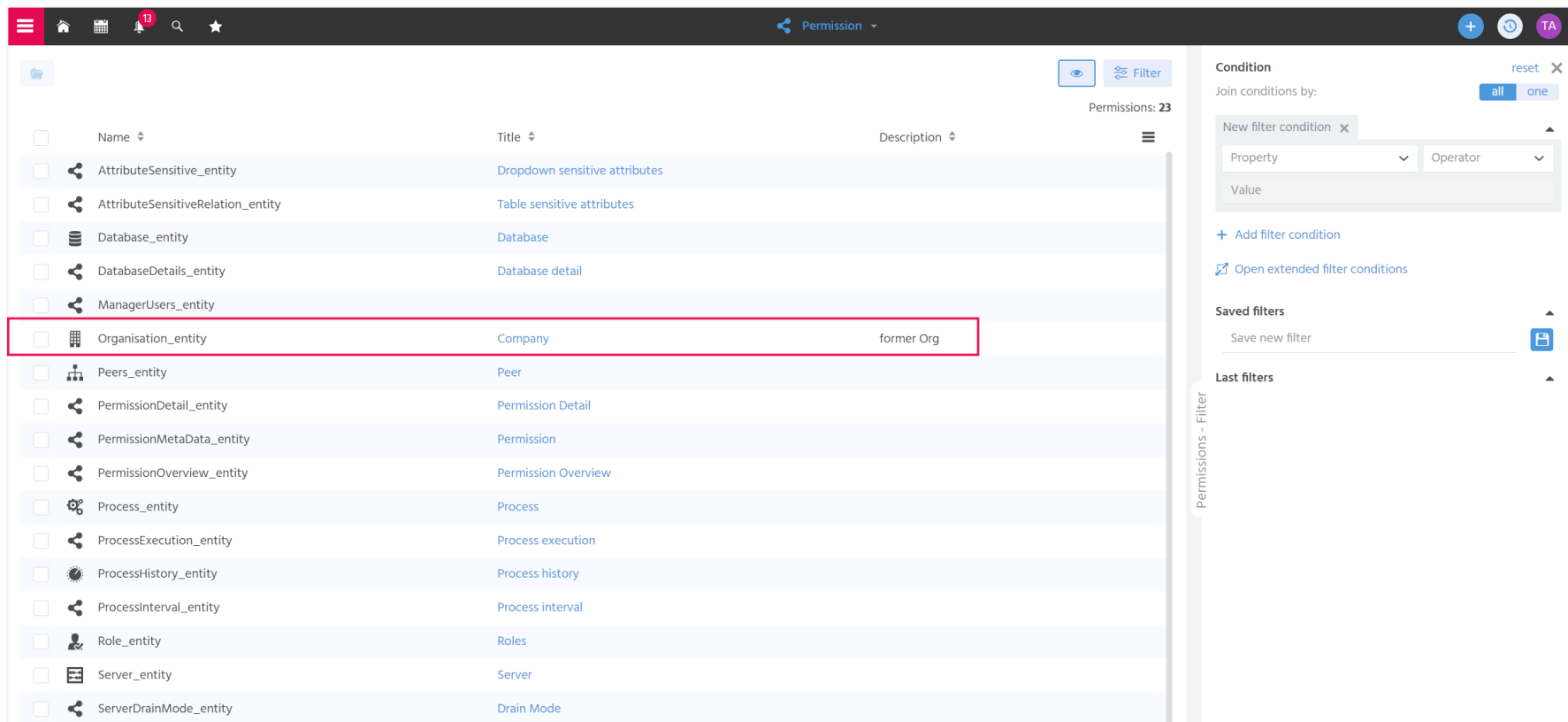
5 Deploy

Properties	Extended
initFilterProcess	import { neon } from "@adito..."
contentTitleProcess	import { vars } from "@adito..."
contentDescriptionProcess	import { result, vars } from "..."
Processing grants	
usePermissions	☒
grantCreate	☒
grantCreateProcess	
grantUpdate	☒
grantUpdateProcess	
grantDelete	☒
grantDeleteProcess	import { ContextUtils, Admin...
Color	
color	
colorProcess	
Icon	
image	
imageProcess	import { vars } from "@adito..."
iconId	VAADIN:BUILDING
iconIdProcess	

usePermissions

Determines if the element is relevant for the authorisation concept. For example: If this value is true the element can be selected for the grant configuration within the client

Authorizing Entitys



The screenshot displays the ADITO user interface. At the top, a dark navigation bar contains icons for home, calendar, notifications (13), search, and a star. A 'Permission' dropdown menu is visible on the right. Below the navigation bar, a table lists various entities. The 'Organisation_entity' row is highlighted with a red border. To the right of the table, a sidebar titled 'Permissions - Filter' contains a 'Condition' section with a 'Join conditions by:' dropdown (set to 'all') and a 'New filter condition' form. Below this, there are sections for 'Saved filters' and 'Last filters'.

Name	Title	Description
AttributeSensitive_entity	Dropdown sensitive attributes	
AttributeSensitiveRelation_entity	Table sensitive attributes	
Database_entity	Database	
DatabaseDetails_entity	Database detail	
ManagerUsers_entity		
Organisation_entity	Company	former Org
Peers_entity	Peer	
PermissionDetail_entity	Permission Detail	
PermissionMetaData_entity	Permission	
PermissionOverview_entity	Permission Overview	
Process_entity	Process	
ProcessExecution_entity	Process execution	
ProcessHistory_entity	Process history	
ProcessInterval_entity	Process interval	
Role_entity	Roles	
Server_entity	Server	
ServerDrainMode_entity	Drain Mode	

Permissions: 23

Condition

Join conditions by: all one

reset X

New filter condition X

Property Operator Value

+ Add filter condition

Open extended filter conditions

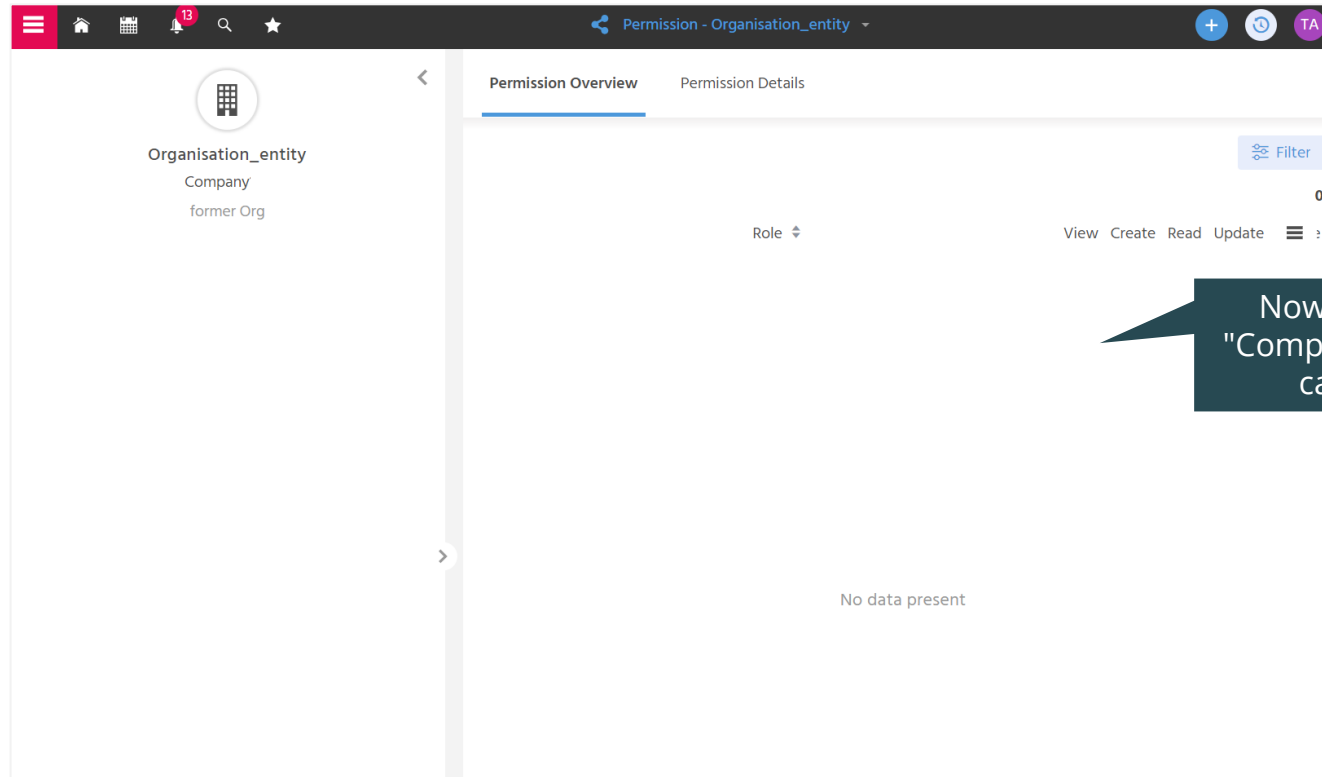
Saved filters

Save new filter

Last filters

Permissions - Filter

Authorizing Entitys



Organisation_entity
Company
former Org

Permission Overview Permission Details

Filter

0

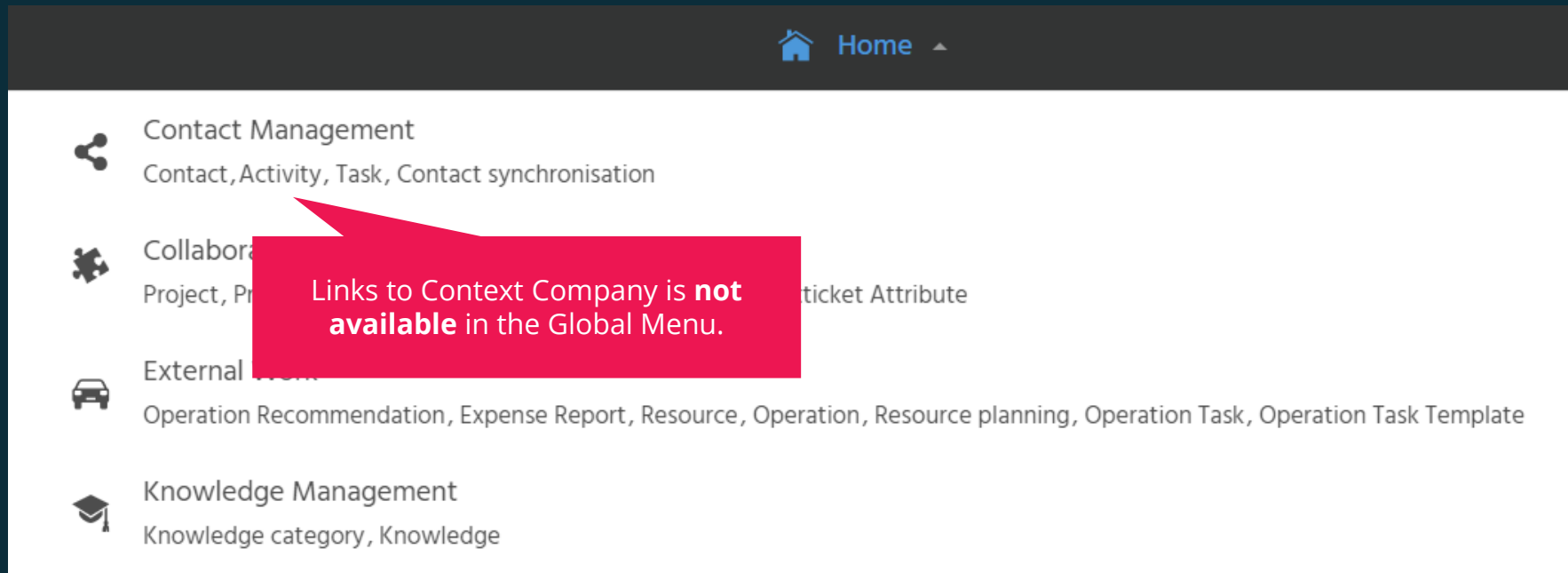
Role View Create Read Update

No data present

Now, no role can view the Link "Company" in the Global Menu and cannot edit data records.

Authorizing Entitys

View of the user



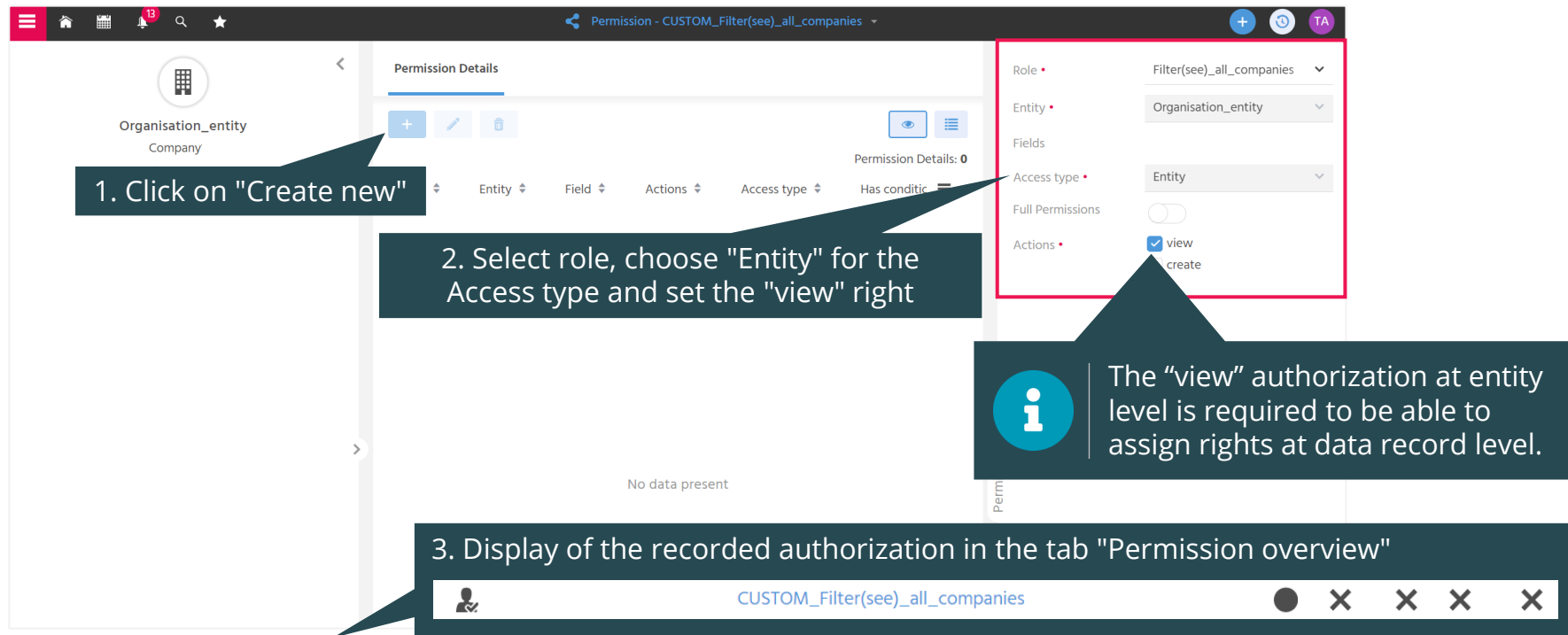
The screenshot displays the ADITO user interface. At the top, a dark grey navigation bar contains a home icon and the text "Home" with a dropdown arrow. Below this, a white menu area lists several categories, each with an icon and a list of sub-items:

- Contact Management** (Share icon): Contact, Activity, Task, Contact synchronisation
- Collaboration** (Puzzle pieces icon): Project, Project template, Project attribute, Project ticket Attribute
- External system** (Car icon): Operation Recommendation, Expense Report, Resource, Operation, Resource planning, Operation Task, Operation Task Template
- Knowledge Management** (Graduation cap icon): Knowledge category, Knowledge

A red callout box with a pointer directed at the "Collaboration" section contains the text: "Links to Context Company is **not available** in the Global Menu."

Authorizing Entitys

Control the display of the links in the Global Menu: grant VIEW-authorization



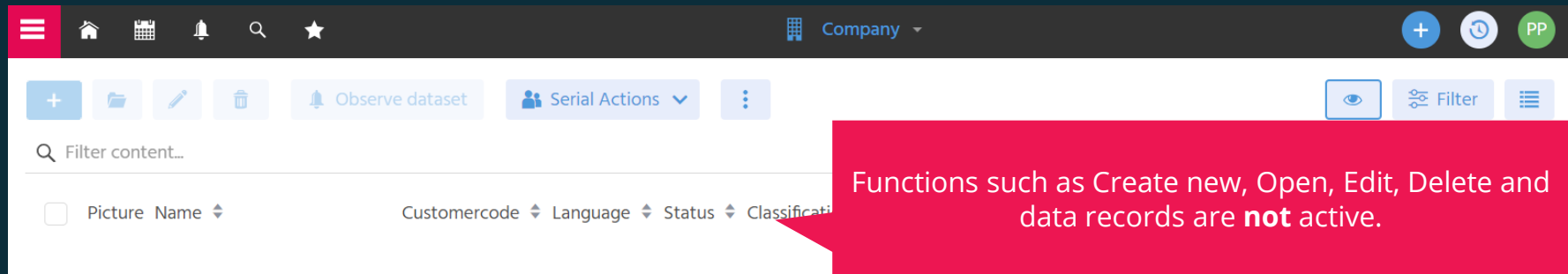
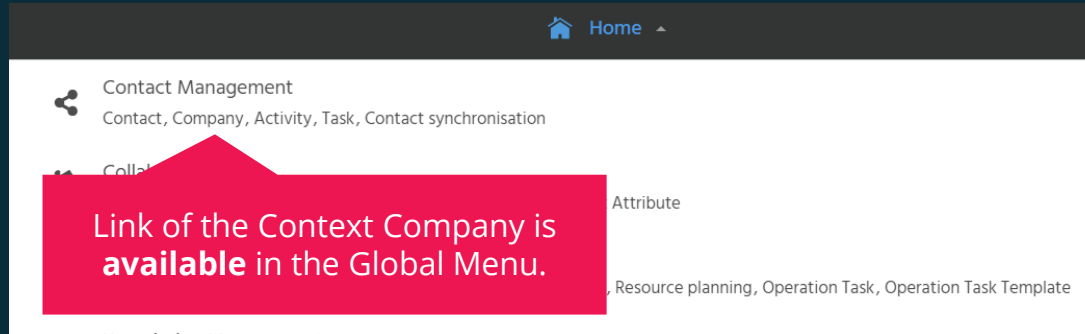
The screenshot shows the ADITO user interface for managing permissions. The top navigation bar includes a menu icon, home, calendar, notifications (13), search, and a star. The main content area is titled 'Permission - CUSTOM_Filter(see)_all_companies'. On the left, there's a sidebar with 'Organisation_entity' and 'Company'. The main panel is divided into 'Permission Details' and 'Permission overview' tabs. The 'Permission Details' tab is active, showing a table with columns: Entity, Field, Actions, Access type, and Has condition. A red box highlights the 'Access type' dropdown menu, which is set to 'Entity'. Below it, the 'Full Permissions' toggle is off, and the 'Actions' list shows 'view' and 'create' with checkboxes. A red box also highlights the 'view' checkbox. A third callout points to the 'Permission overview' tab at the bottom, which shows a table with one entry: 'CUSTOM_Filter(see)_all_companies'.

1. Click on "Create new"
2. Select role, choose "Entity" for the Access type and set the "view" right
3. Display of the recorded authorization in the tab "Permission overview"

The "view" authorization at entity level is required to be able to assign rights at data record level.

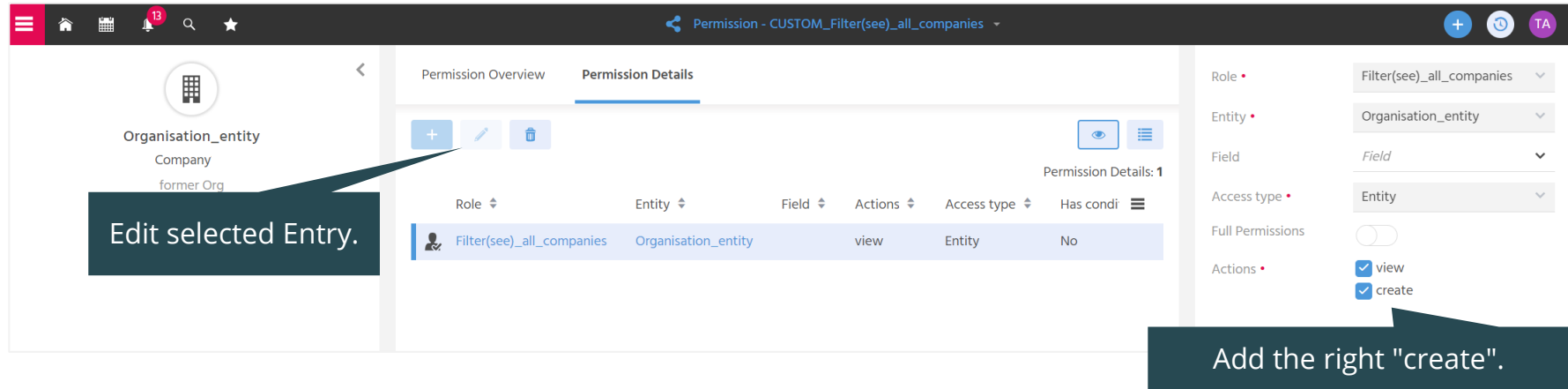
Authorizing Entitys

View of the user



Authorizing Entitys

Create new data records: grant CREATE permission



Organisation_entity
Company
former Org

Edit selected Entry.

Permission Overview | **Permission Details**

Permission Details: 1

Role	Entity	Field	Actions	Access type	Has condi
Filter(see)_all_companies	Organisation_entity		view	Entity	No

Role • Filter(see)_all_companies

Entity • Organisation_entity

Field • Field

Access type • Entity

Full Permissions ☐

Actions • ☒ view ☒ create

Add the right "create".

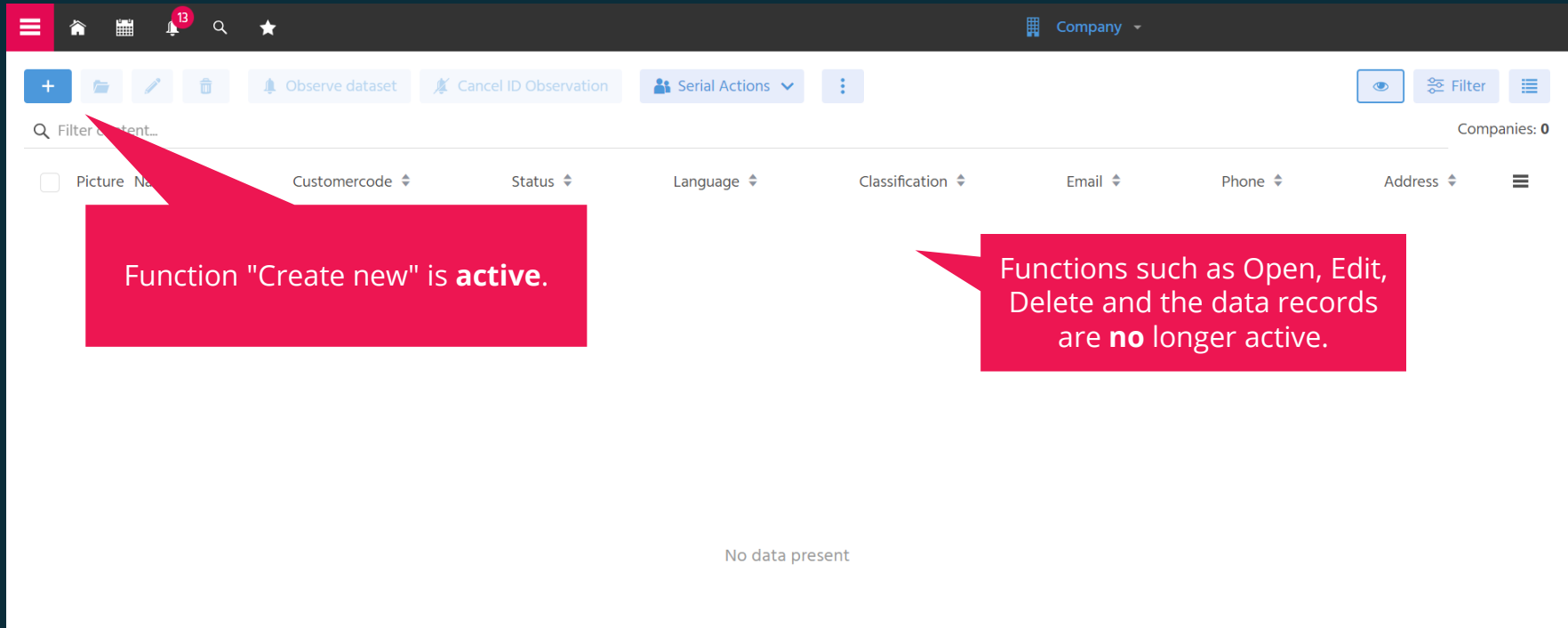
Display of recorded permissions in tab "Permission overview"



CUSTOM_Filter(see)_all_companies

Authorizing Entitys

View of user



Function "Create new" is **active**.

Functions such as Open, Edit, Delete and the data records are **no** longer active.

No data present

Authorizing Entitys



Configure all rights for an Entity and its data records.

The rights **Open (Read)**, **Edit (Update)** or **delete (Delete)** can be assigned for the selected Entity at data record level.

These rights can, for example, be assigned to a role or individual function/filter roles.

However, the condition is that every one of these roles has the right to VIEW at Entity level.

The screenshot displays the 'Permission Details' configuration page in the ADITO application. On the left, a sidebar shows the 'Organisation_entity' (Company, former Org). The main area is titled 'Permission Details' and contains a table with the following columns: Role, Entity, Field, Actions, Access type, and Has condition. A single row is listed with the role 'Filter(see)_all_companies', entity 'Organisation_entity', field 'view, create', access type 'Entity', and condition 'No'. To the right of the table, a 'Permission Details: 1' panel shows the configuration for this role. It includes a 'Role' dropdown set to 'Filter(see)_all_companies', an 'Entity' dropdown set to 'Organisation_entity', and a 'Fields' dropdown set to 'Dataset'. Under 'Access type', there is a link to 'Open extended filter conditions'. In the 'Actions' section, the 'read' checkbox is checked and highlighted with a red box, while 'update' and 'delete' are unchecked. A dark blue callout box with white text points to the 'read' checkbox, stating: 'This role can view all data records of this entity.'

Role	Entity	Field	Actions	Access type	Has condition
Filter(see)_all_companies	Organisation_entity	view, create	Entity	No	

Permission Details: 1

Role: Filter(see)_all_companies

Entity: Organisation_entity

Fields: Dataset

Access type: Open extended filter conditions

Condition:

Actions: ☒ read, ☐ update, ☐ delete

This role can view all data records of this entity.



Authorizing data records

Role • Filter(see)_all_companies ▼

Entity • Organisation_entity ▼

Fields

Access type • Dataset ▼

Condition [Open extended filter conditions](#)

Actions •

- ☒ read
- ☒ update
- ☒ delete

Role can edit (Update) data records of an Entity

Role can delete data records of an Entity

Authorizing data records

Configuring all rights for an Entity and its data records.

Role	View	Create	Read	Update	Delete
 CUSTOM_Function_Edit_Companies	●	×	×	●	×
 CUSTOM_Function_Delete_companies	●	×	×	×	●
 CUSTOM_Filter(see)_all_companies	●	×	●	×	×
 CUSTOM_Function_Create_companies	●	●	×	×	×

The rights READ, UPDATE and DELETE were split among three roles.

Authorizing data records

View of user

Navigation bar: Home, Calendar, 13 notifications, Search, Star, Company

Toolbar: +, Folder, Edit, Delete, Observe dataset

Filter content...

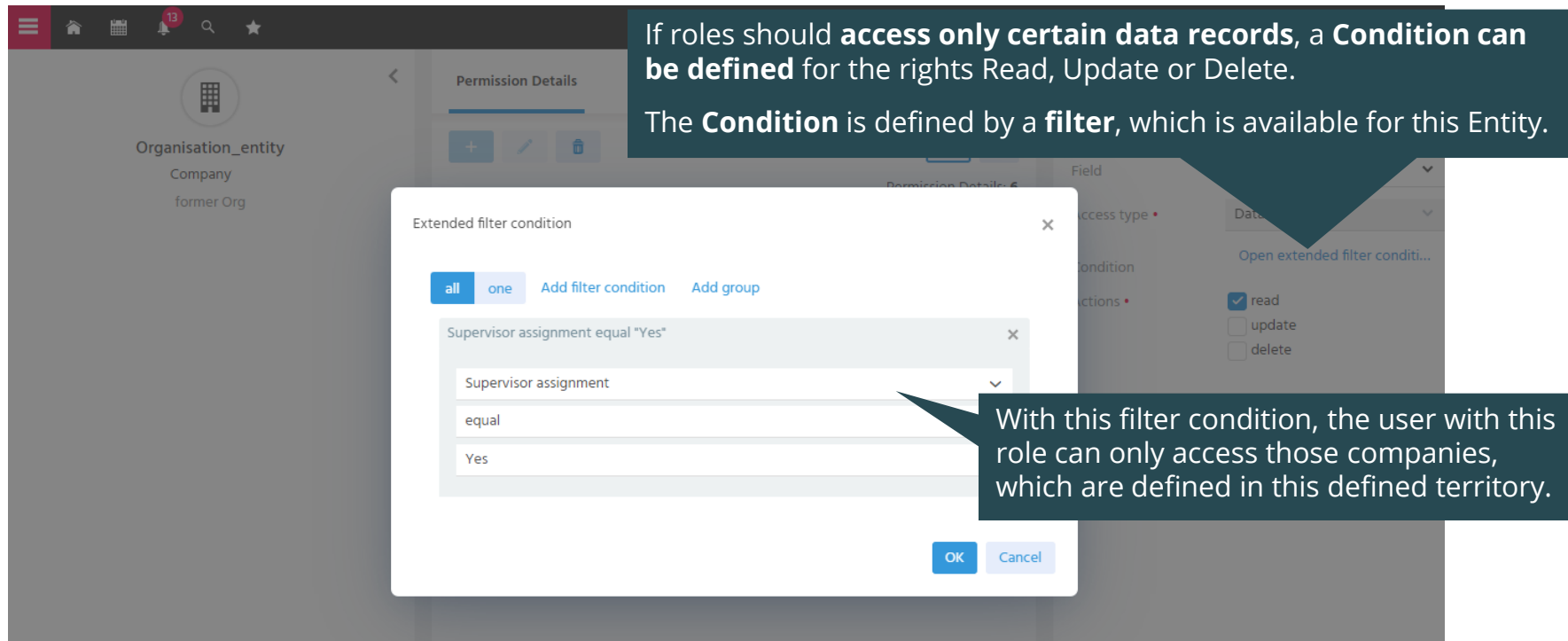
Companies: 56

All functions and data records are **available**.

☐	Picture	Name	Customercode	Status	Language	Classification	Email	Phone	Address
☒		Aquire GmbH	3469	Active	English	--	info@acquire.de	+49 4321 78990	Friedenstraße 12 b - DE 93053 Regensburg
☐		Bohrmarkt GmbH	9612	Active	German		info@bohrmarkt.de	+49 9246 552	Innstraße 11 - DE 93059 Regensburg
☐		Bornheimer Maschinenfabrik GmbH	4387	Active	German		info@bornheimer.de	+49 2222 940210	Peter-Fryns-Platz - DE 53332 Bornheim
☐		Bucher Unternehmensgruppe	3698	Active	German	BC	info@bucher.de	+49 40 42580	Julius-Leber-Straße 32 - DE 22765 Hamburg
☐		Emil Brandstätter AG	5609	Active	German		kontakt@brandstaetter.de	+49 831 25359	Mühlhauserstr. 20 - DE 81379 München
☐		Ertl GmbH	7824	Active	German	--	service@ertl.de	+49 335 12875	Belgische Straße 2 - DE 15234 Frankfurt (Oder)
☐		Fahey, Spencer and Armstrong	1793	Active	English	CD	greattohearfromyou@fsa.org	+44 20 3245 1844	69 New Street - GB B2 4DU Birmingham
☐		Firmengruppe Matthias Bogen	4567	Active	German	DC	info@matthiasbogen.de	+49 421 98650	Pfeilstraße 7 - DE 28217 Bremen
☐		Fischer AG	1018	Active	German	DC	info@fischer.tr	+49 6472 35000	Brenneckestraße 100 - DE 39116 Magdeburg
☐		Glob Group	1212	Active	English	BB	contact@globgroup.com	+44 20 1432 3000	32-40 Blackfriars Road - GB SE1 8NW London

Authorizing data records

Authorize only certain data records



If roles should **access only certain data records**, a **Condition** can be defined for the rights Read, Update or Delete.

The **Condition** is defined by a **filter**, which is available for this Entity.

Extended filter condition

all **one** Add filter condition Add group

Supervisor assignment equal "Yes"

Supervisor assignment

equal

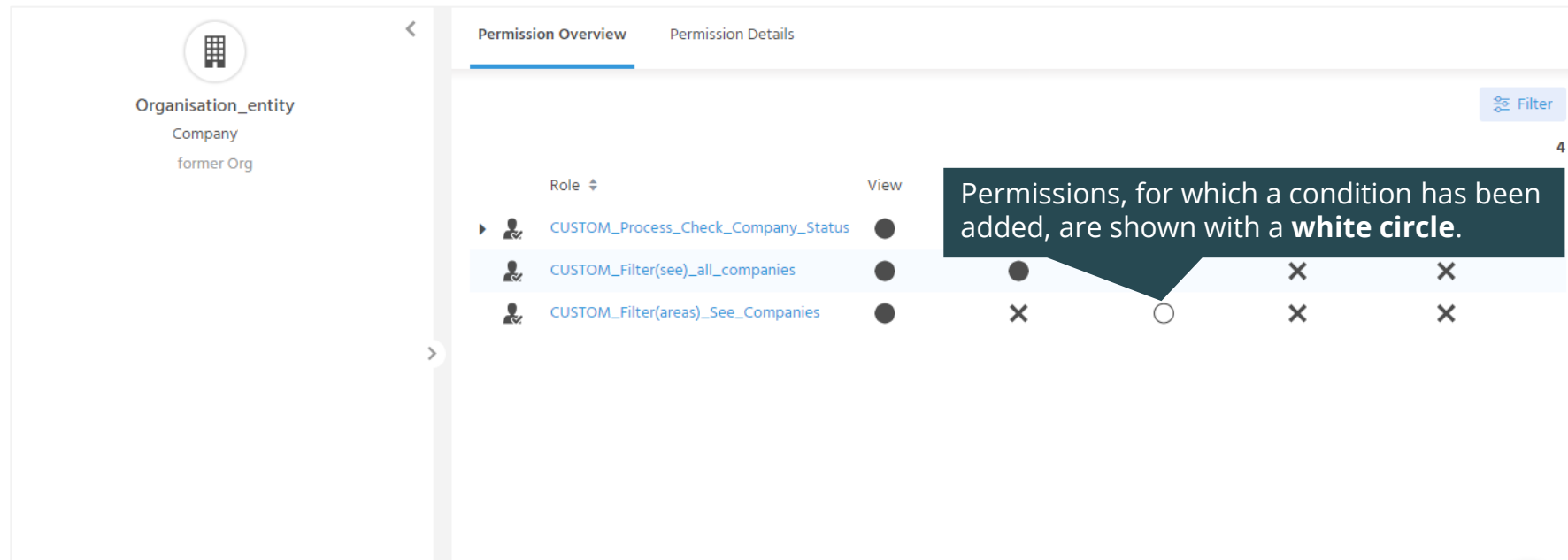
Yes

OK Cancel

With this filter condition, the user with this role can only access those companies, which are defined in this defined territory.

Authorizing data records

Authorize only certain data records



Organisation_entity
Company
former Org

Permission Overview Permission Details

Filter

4

Role	View					
CUSTOM_Process_Check_Company_Status	●					
CUSTOM_Filter(see)_all_companies	●	●			×	×
CUSTOM_Filter(areas)_See_Companies	●	×	○		×	×

Permissions, for which a condition has been added, are shown with a **white circle**.

Condition

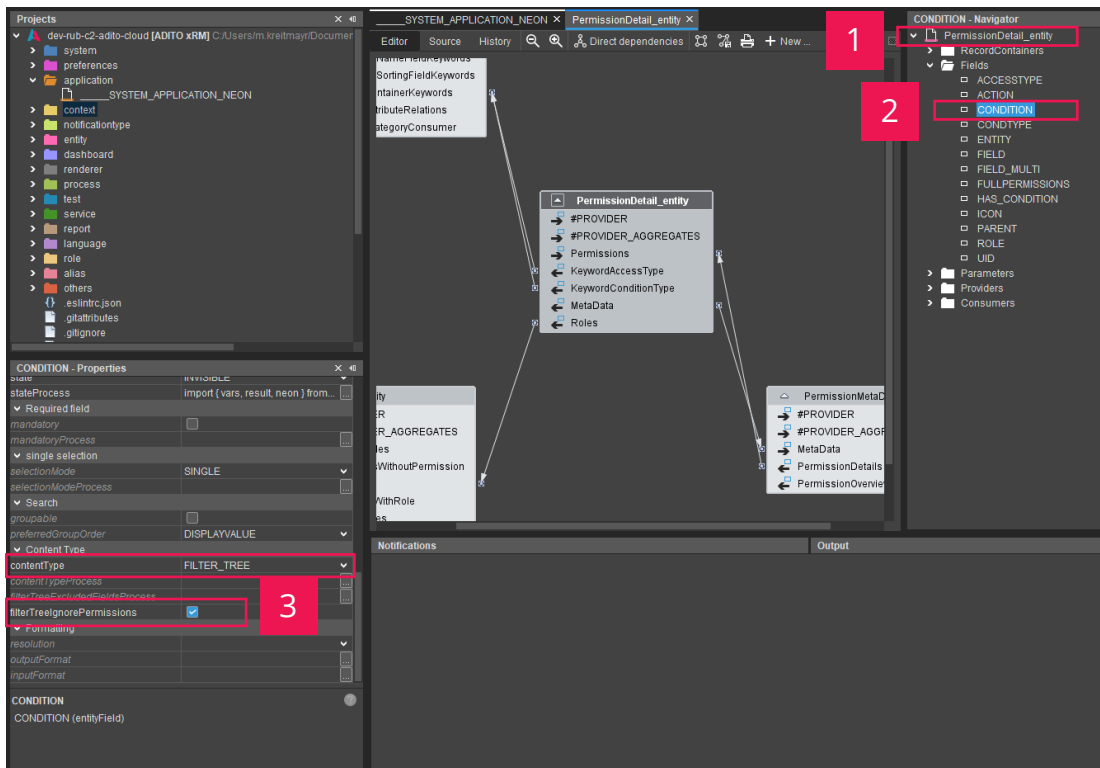
Display of filter properties

To be able to access the filter for recording the condition, without the administrator having rights to the entity, the property "filterTreeIgnorePermission" must be activated for the field "Condition" in the Entity "PermissionDetail".

If this checkbox is ticked, the permission (VIEW permission on the respective entity) is ignored when the filter tree component is opened.



This setting is deactivated by default.



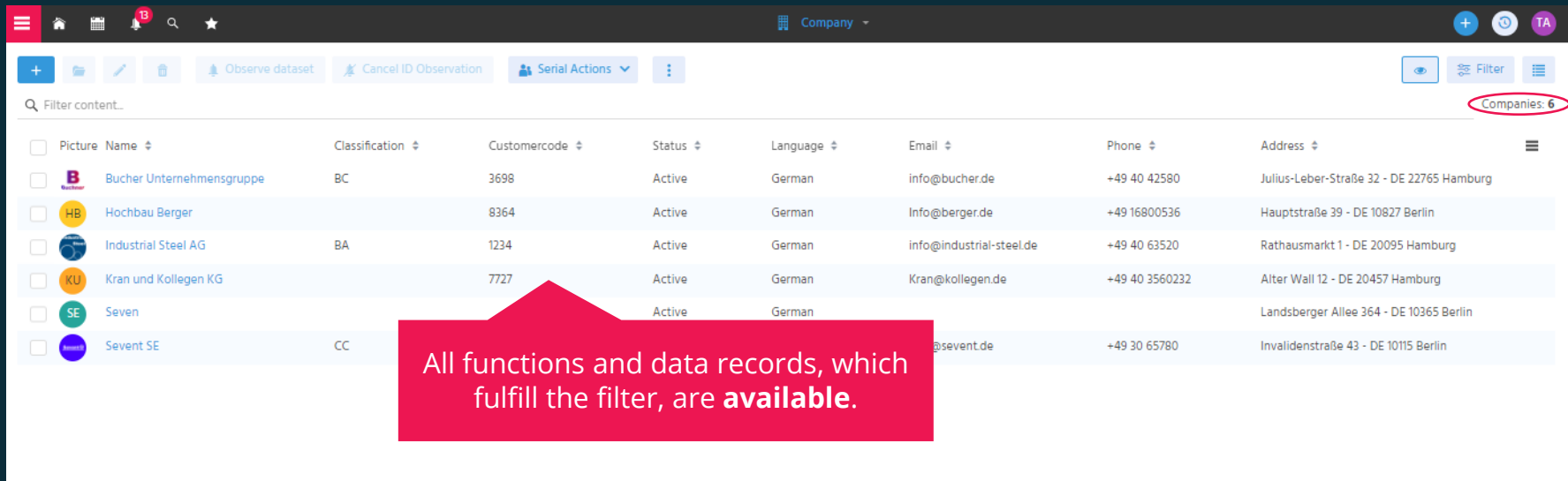
The screenshot displays the ADITO development environment with three main panels:

- Projects Panel (Left):** Shows a tree view of the project structure. The 'SYSTEM_APPLICATION_NEON' folder is expanded, showing sub-folders like 'context', 'notificationtype', 'entity', 'dashboard', 'renderer', 'process', 'test', 'service', 'report', 'language', 'role', 'alias', 'others', 'eslintrc.json', 'gitattributes', and 'gitignore'.
- Editor Panel (Center):** Displays the 'PermissionDetail_entity' model. It shows a diagram with fields: '#PROVIDER', '#PROVIDER_AGGREGATES', 'Permissions', 'KeywordAccessType', 'KeywordConditionType', 'MetaData', and 'Roles'. The 'PermissionDetail_entity' is highlighted with a red box and labeled with a red '1'.
- CONDITION - Navigator Panel (Right):** Shows a tree view of the 'PermissionDetail_entity' fields. The 'CONDITION' field is highlighted with a red box and labeled with a red '2'.

Below the Editor panel, the 'CONDITION - Properties' panel is visible, showing various configuration options. The 'Content Type' is set to 'FILTER_TREE'. The 'filterTreeIgnorePermissions' checkbox is checked, highlighted with a red box, and labeled with a red '3'.

Authorizing data records

View of user



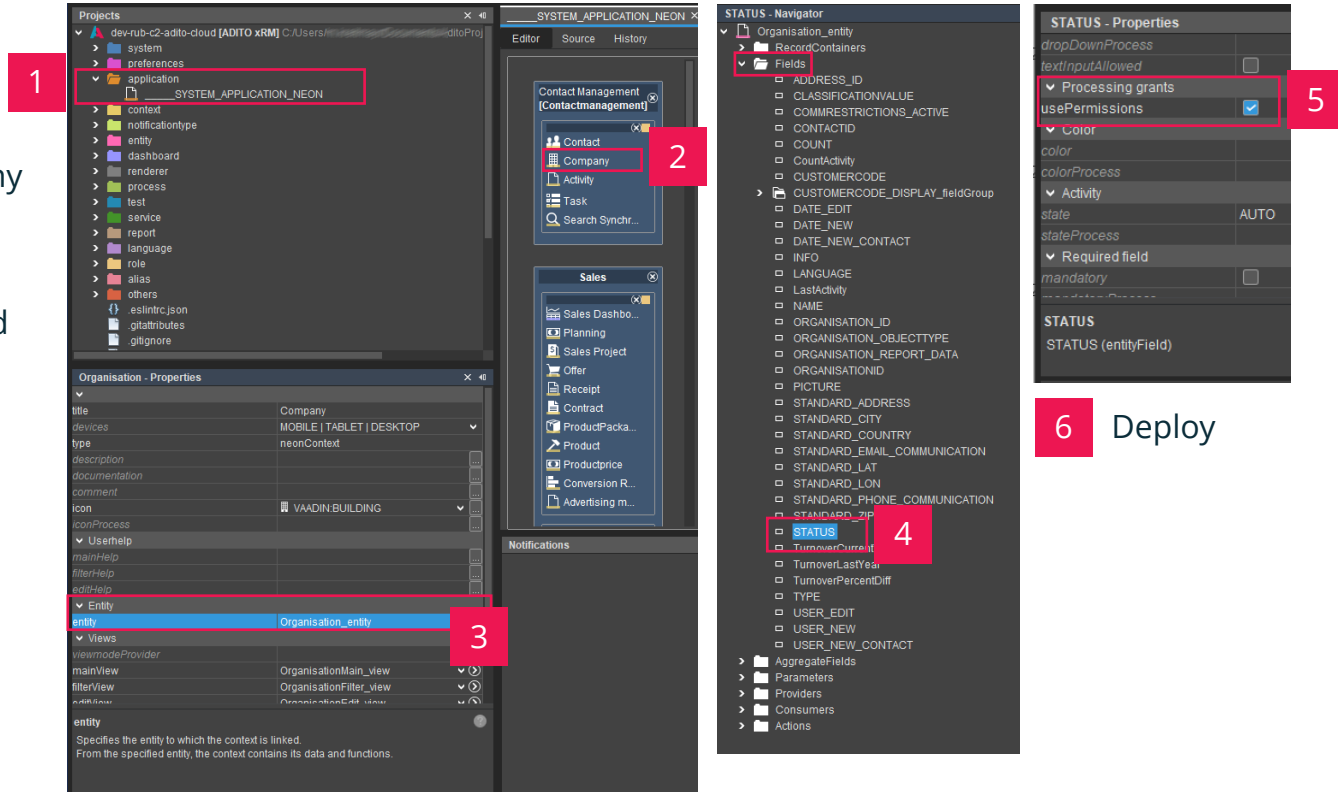
The screenshot displays the ADITO user interface. At the top, there is a navigation bar with icons for home, calendar, notifications (13), search, and favorites. A 'Company' dropdown menu is visible. Below the navigation bar, there is a toolbar with buttons for '+', 'Observe dataset', 'Cancel ID Observation', 'Serial Actions', and a menu icon. A search bar labeled 'Filter content...' is present. On the right side, there is a 'Filter' button and a 'Companies: 6' indicator. The main content area shows a table with the following columns: Picture, Name, Classification, Customercode, Status, Language, Email, Phone, and Address. The table contains six rows of data, each representing a company. A red callout box points to the table with the text: 'All functions and data records, which fulfill the filter, are available.'

Picture	Name	Classification	Customercode	Status	Language	Email	Phone	Address
	Bucher Unternehmensgruppe	BC	3698	Active	German	info@bucher.de	+49 40 42580	Julius-Leber-Straße 32 - DE 22765 Hamburg
	Hochbau Berger		8364	Active	German	Info@berger.de	+49 16800536	Hauptstraße 39 - DE 10827 Berlin
	Industrial Steel AG	BA	1234	Active	German	info@industrial-steel.de	+49 40 63520	Rathausmarkt 1 - DE 20095 Hamburg
	Kran und Kollegen KG		7727	Active	German	Kran@kollegen.de	+49 40 3560232	Alter Wall 12 - DE 20457 Hamburg
	Seven			Active	German			Landsberger Allee 364 - DE 10365 Berlin
	Sevent SE	CC				@sevent.de	+49 30 65780	Invalidenstraße 43 - DE 10115 Berlin

Authorizing fields

Possibility 1:

1. Access through the SYSTEM_APPLICATION.
2. Search the Context Company
3. Open the associated Organisation_entitys
4. Open properties of this field
5. Activate usePermissions



1

2

3

4

5

Possibility 2:

Access through complete selection "context" in Projects.
(Follow steps 3. – 5.)

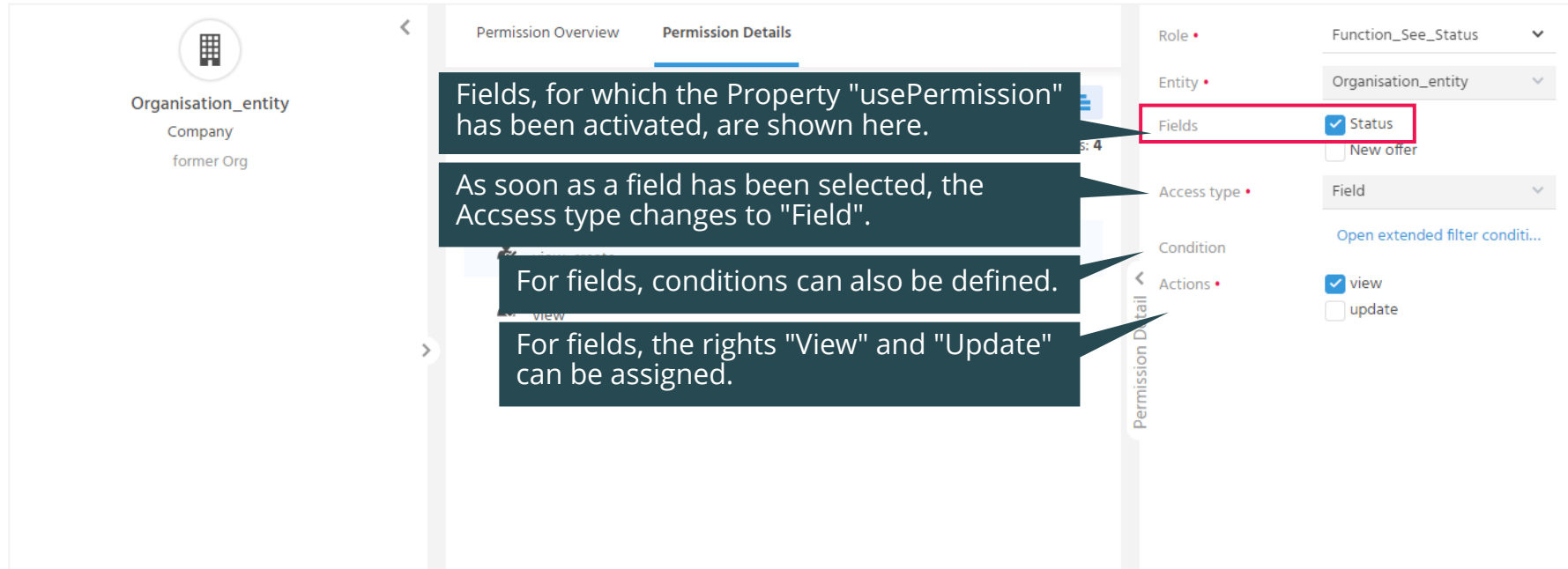
Possibility 3:

Access through complete selection "entity" in Projects.
(Follow steps 4. und 5.)

6 Deploy

Authorizing fields

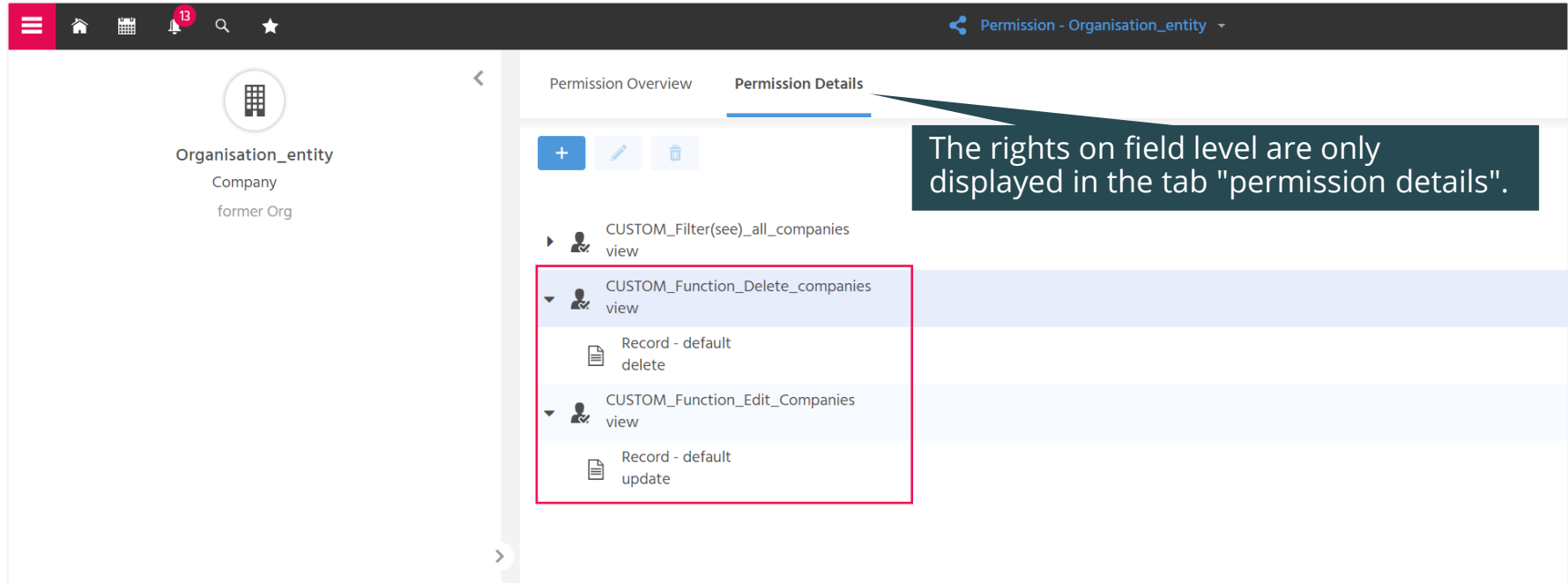
Show fields



The screenshot displays the 'Permission Details' configuration page in ADITO. On the left, a sidebar shows the 'Organisation_entity' (Company) and 'former Org'. The main area has two tabs: 'Permission Overview' and 'Permission Details' (active). The right sidebar contains configuration options: 'Role' (Function_See_Status), 'Entity' (Organisation_entity), 'Fields' (with a red box around the 'Status' checkbox), 'Access type' (Field), 'Condition' (Open extended filter condi...), and 'Actions' (view and update checkboxes). Four callout boxes provide context:

- Fields, for which the Property "usePermission" has been activated, are shown here.
- As soon as a field has been selected, the Access type changes to "Field".
- For fields, conditions can also be defined.
- For fields, the rights "View" and "Update" can be assigned.

Authorizing fields



Organisation_entity
Company
former Org

Permission Overview **Permission Details**

+ ✎ 🗑

▶ CUSTOM_Filter(see)_all_companies view

▼ CUSTOM_Function_Delete_companies view

Record - default delete

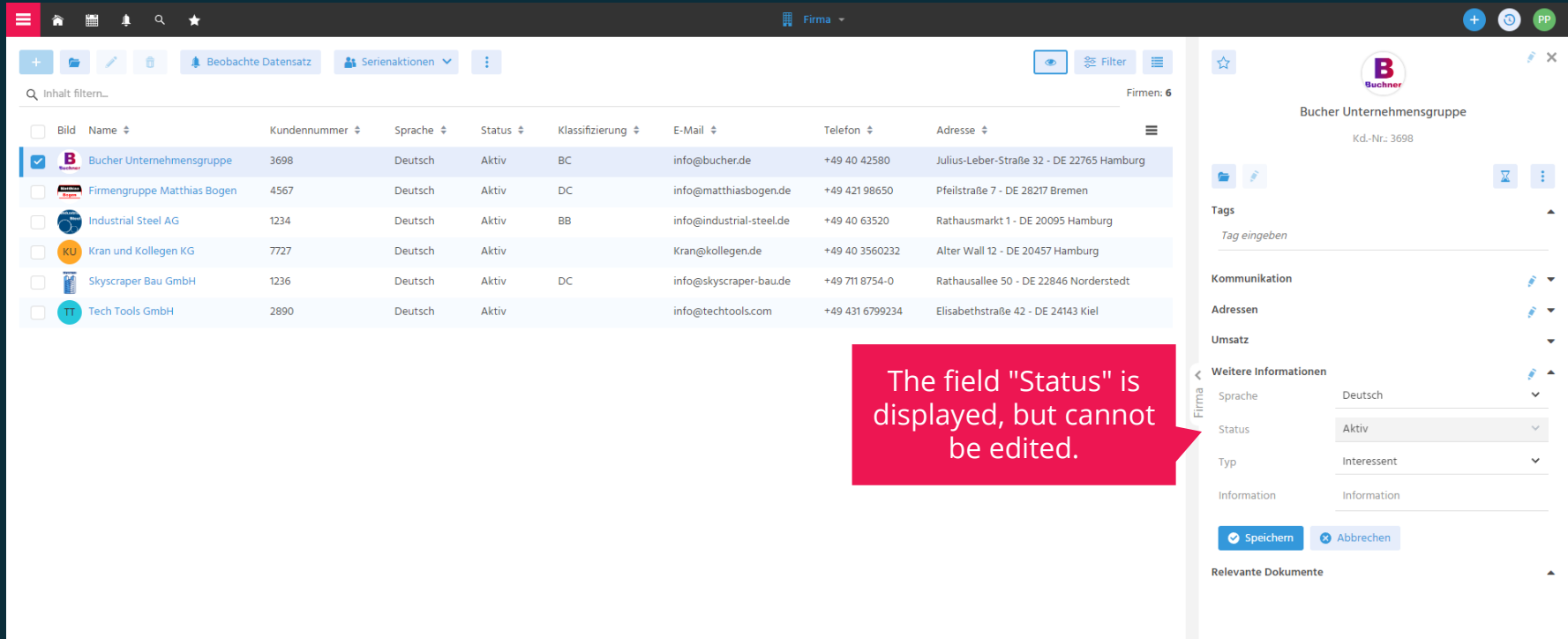
▼ CUSTOM_Function_Edit_Companies view

Record - default update

The rights on field level are only displayed in the tab "permission details".

Authorizing fields

View of the user with the role "Function_View_Company_Status"



The screenshot displays the ADITO application interface. On the left, a table lists six companies. The first company, 'Bucher Unternehmensgruppe', is selected. On the right, a detailed view of this company is shown, including its logo, name, and identification number (Kd.-Nr.: 3698). Below this, there are sections for 'Tags', 'Kommunikation', 'Adressen', 'Umsatz', and 'Weitere Informationen'. The 'Weitere Informationen' section shows fields for 'Sprache' (Deutsch), 'Status' (Aktiv), 'Typ' (Interessant), and 'Information' (Information). A red callout box points to the 'Status' field, indicating that it is displayed but cannot be edited.

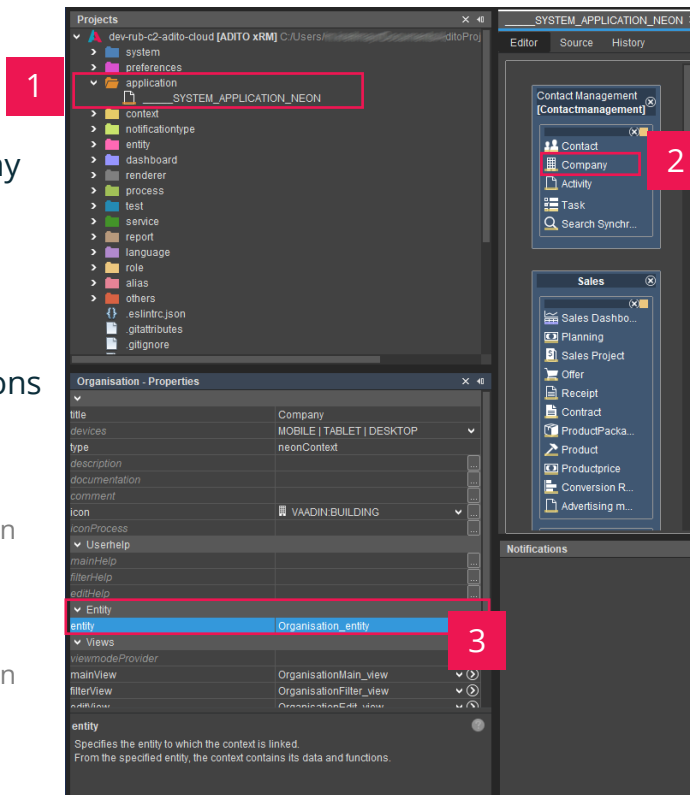
Bild	Name	Kundennummer	Sprache	Status	Klassifizierung	E-Mail	Telefon	Adresse
	Bucher Unternehmensgruppe	3698	Deutsch	Aktiv	BC	info@bucher.de	+49 40 42580	Julius-Leber-Straße 32 - DE 22765 Hamburg
	Firmengruppe Matthias Bogen	4567	Deutsch	Aktiv	DC	info@matthiasbogen.de	+49 421 98650	Pfeilstraße 7 - DE 28217 Bremen
	Industrial Steel AG	1234	Deutsch	Aktiv	BB	info@industrial-steel.de	+49 40 63520	Rathausmarkt 1 - DE 20095 Hamburg
	Kran und Kollegen KG	7727	Deutsch	Aktiv		Kran@kollegen.de	+49 40 3560232	Alter Wall 12 - DE 20457 Hamburg
	Skyscraper Bau GmbH	1236	Deutsch	Aktiv	DC	info@skyscraper-bau.de	+49 711 8754-0	Rathausallee 50 - DE 22846 Norderstedt
	Tech Tools GmbH	2890	Deutsch	Aktiv		info@techtools.com	+49 431 6799234	Elisabethstraße 42 - DE 24143 Kiel

The field "Status" is displayed, but cannot be edited.

Authorizing Actions

Possibility 1:

1. Access through the SYSTEM_APPLICATION.
2. Search the Context Company
3. Open the associated Organisation_entitys
4. Öffnen der Properties der Aktion
5. Aktivieren von usePermissions

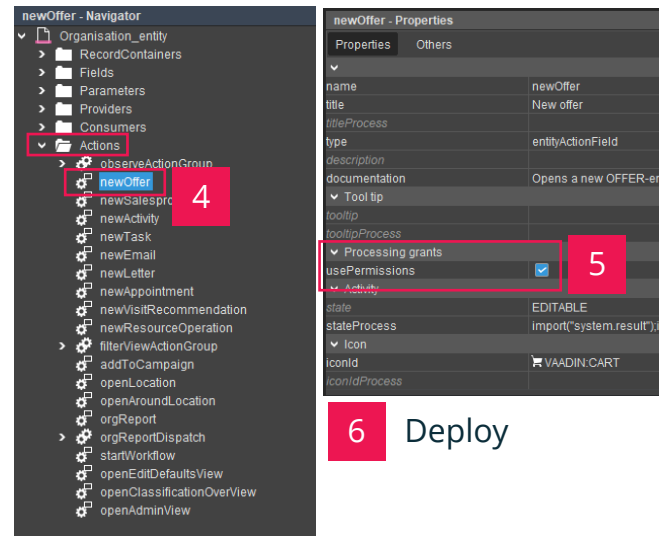


Possibility 2:

Access through the complete selection "context" in Projects.
(Follow steps 3. – 5.)

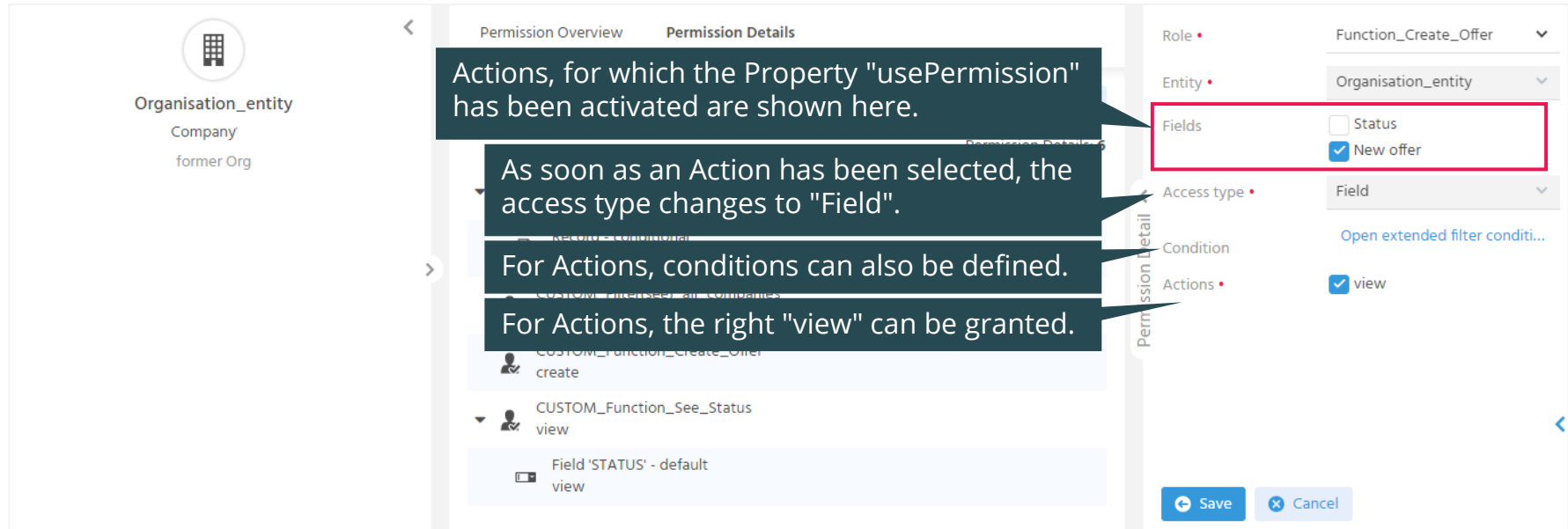
Possibility 3:

Access through the complete selection "entities" in Projects
(Follow steps 4. und 5.)



Authorizing Actions

VIEW permission



The screenshot shows the 'Permission Details' configuration page in ADITO. On the left, a sidebar identifies the 'Organisation_entity' as a 'Company' and 'former Org'. The main panel is divided into a list of permissions on the left and a detailed configuration area on the right. The configuration area includes dropdowns for 'Role' (Function_Create_Offer) and 'Entity' (Organisation_entity). The 'Fields' section is highlighted with a red box, showing 'Status' as an unchecked option and 'New offer' as a checked option. The 'Access type' is set to 'Field'. The 'Actions' section shows 'view' as a checked option. At the bottom are 'Save' and 'Cancel' buttons.

Organisation_entity
Company
former Org

Permission Overview **Permission Details**

Actions, for which the Property "usePermission" has been activated are shown here.

As soon as an Action has been selected, the access type changes to "Field".

For Actions, conditions can also be defined.

For Actions, the right "view" can be granted.

Role • Function_Create_Offer

Entity • Organisation_entity

Fields

- ☐ Status
- ☒ New offer

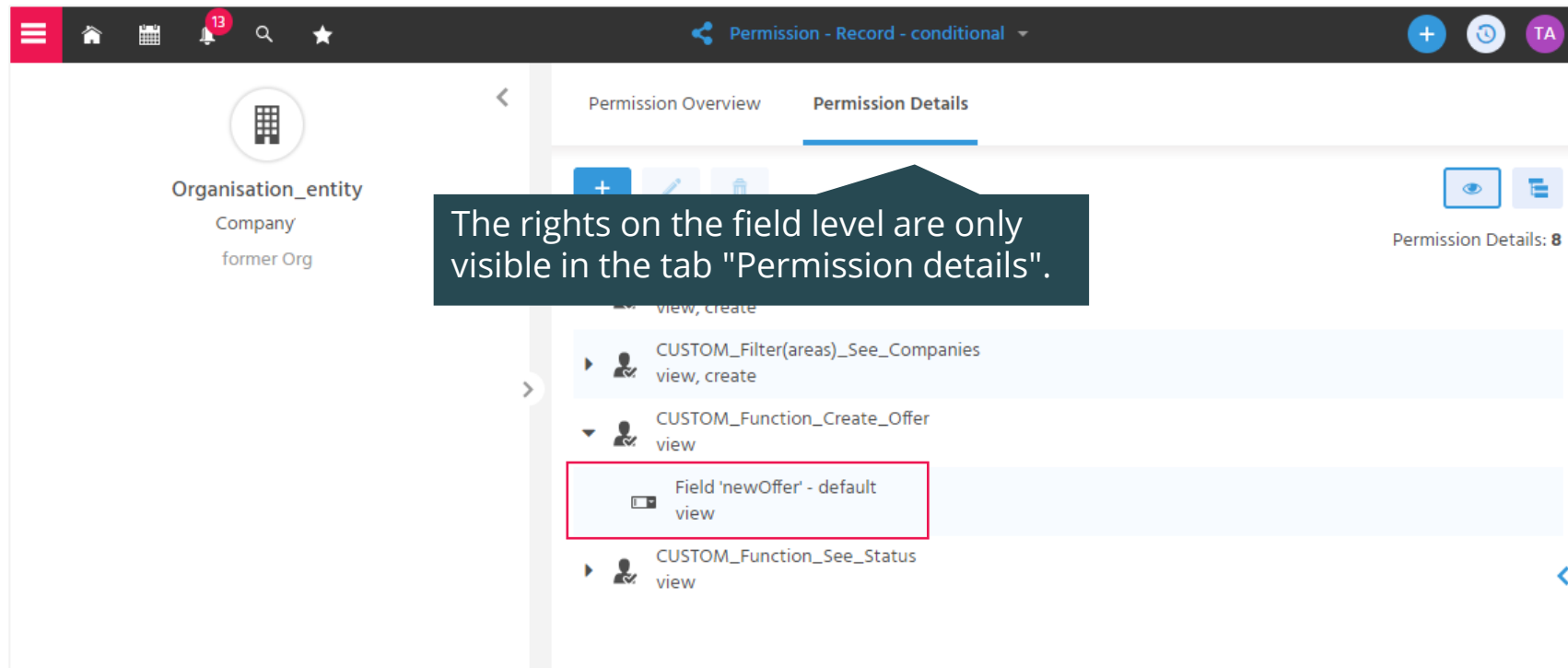
Access type • Field

Condition [Open extended filter condi...](#)

Actions • ☒ view

[Save](#) [Cancel](#)

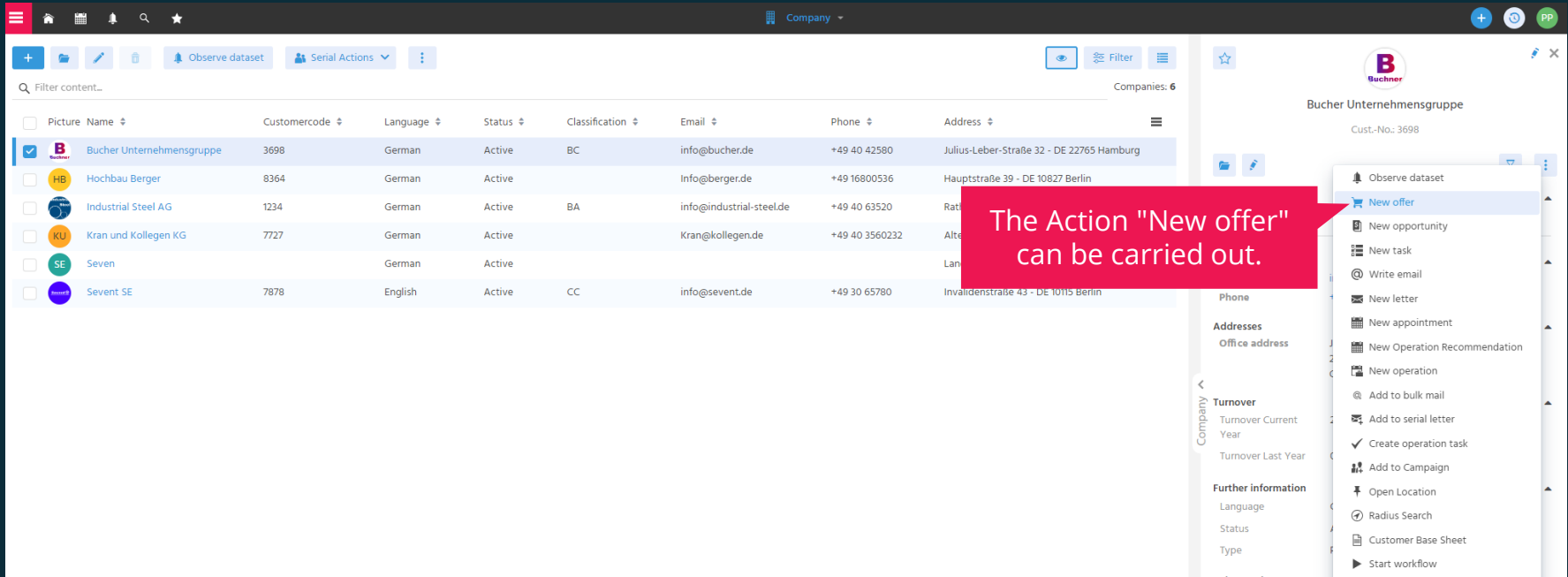
Authorizing Actions



The screenshot displays the ADITO application interface. The top navigation bar includes a menu icon, home, calendar, notifications (13), search, and star icons. The main header shows 'Permission - Record - conditional' and user profile icons (+, TA). The left sidebar identifies the user as 'Organisation_entity' (Company, former Org). The main content area has two tabs: 'Permission Overview' and 'Permission Details' (active). A callout box states: 'The rights on the field level are only visible in the tab "Permission details".' Below this, a list of permissions is shown, with 'Field newOffer - default view' highlighted by a red box. Other permissions include 'CUSTOM_Filter(areas)_See_Companies' (view, create), 'CUSTOM_Function_Create_Offer' (view), and 'CUSTOM_Function_See_Status' (view). The right sidebar shows 'Permission Details: 8'.

Authorizing Actions

View of user



The screenshot displays the ADITO user interface. At the top, there is a navigation bar with icons for home, calendar, notifications, search, and favorites. Below this is a toolbar with buttons for '+', 'Observe dataset', and 'Serial Actions'. A search bar labeled 'Filter content...' is present. The main area shows a table of companies with columns: Picture, Name, Customercode, Language, Status, Classification, Email, Phone, and Address. The table lists six companies, with 'Bucher Unternehmensgruppe' selected. A context menu is open for the selected company, showing various actions. A red callout box points to the 'New offer' action, stating: 'The Action "New offer" can be carried out.'

Picture	Name	Customercode	Language	Status	Classification	Email	Phone	Address
	Bucher Unternehmensgruppe	3698	German	Active	BC	info@bucher.de	+49 40 42580	Julius-Leber-Straße 32 - DE 22765 Hamburg
	Hochbau Berger	8364	German	Active		Info@berger.de	+49 16800536	Hauptstraße 39 - DE 10827 Berlin
	Industrial Steel AG	1234	German	Active	BA	info@industrial-steel.de	+49 40 63520	Rat...
	Kran und Kollegen KG	7727	German	Active		Kran@kollegen.de	+49 40 3560232	Alte...
	Seven		German	Active				Land...
	Sevent SE	7878	English	Active	CC	info@sevent.de	+49 30 65780	InvalidensträÙe 43 - DE 10115 Berlin

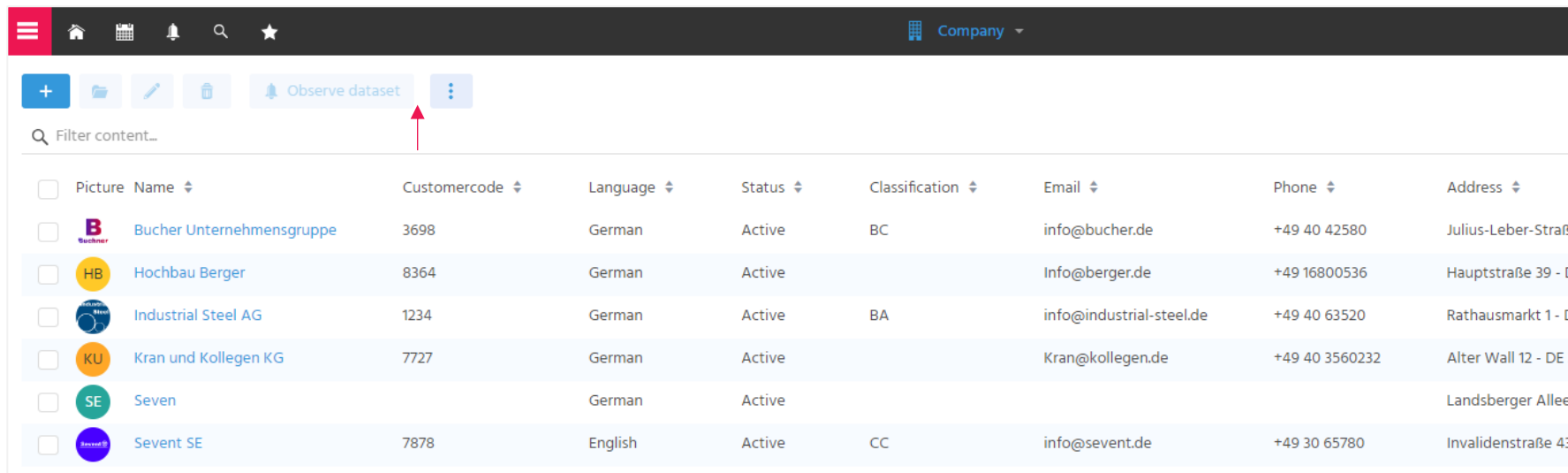
Companies: 6

Context Menu Actions:

- Observe dataset
- New offer
- New opportunity
- New task
- Write email
- New letter
- New appointment
- New Operation Recommendation
- New operation
- Add to bulk mail
- Add to serial letter
- Create operation task
- Add to Campaign
- Open Location
- Radius Search
- Customer Base Sheet
- Start workflow

Button "Serial actions"

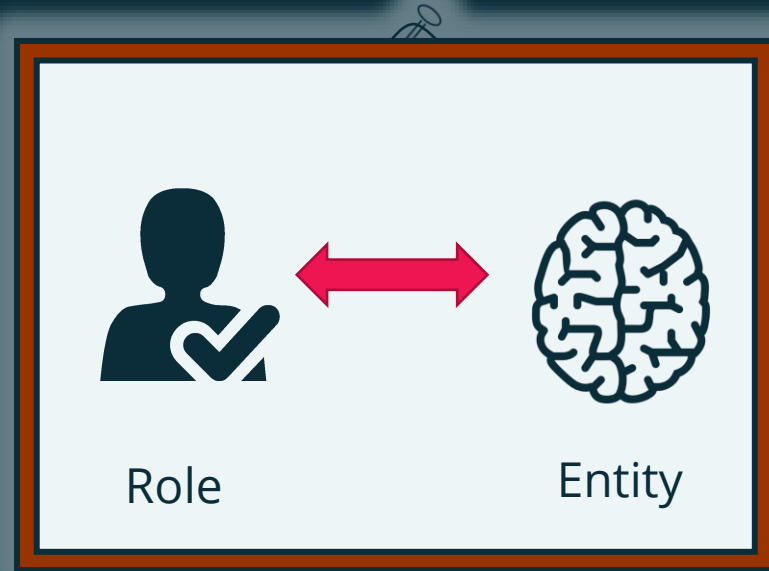
If the Property "usePermission" is active on all Actions, which are subordinate to a Serial action and a user is not assigned a role that authorizes one of the actions, the button "Serial Actions" is hidden.



The screenshot shows the ADITO interface. At the top is a dark navigation bar with icons for home, calendar, notifications, search, and a star. On the right of this bar is a 'Company' dropdown menu. Below the navigation bar is a toolbar with icons for adding, editing, deleting, and observing datasets. The 'Observe dataset' button is highlighted, and a red arrow points to the three-dot menu button next to it. Below the toolbar is a search bar labeled 'Filter content...'. The main content area displays a table of companies with the following columns: Picture, Name, Customercode, Language, Status, Classification, Email, Phone, and Address.

Picture	Name	Customercode	Language	Status	Classification	Email	Phone	Address
	Bucher Unternehmensgruppe	3698	German	Active	BC	info@bucher.de	+49 40 42580	Julius-Leber-Straß
	Hochbau Berger	8364	German	Active		Info@berger.de	+49 16800536	Hauptstraße 39 - D
	Industrial Steel AG	1234	German	Active	BA	info@industrial-steel.de	+49 40 63520	Rathausmarkt 1 - D
	Kran und Kollegen KG	7727	German	Active		Kran@kollegen.de	+49 40 3560232	Alter Wall 12 - DE
	Seven		German	Active				Landsberger Allee
	Sevent SE	7878	English	Active	CC	info@sevent.de	+49 30 65780	Invalidenstraße 43

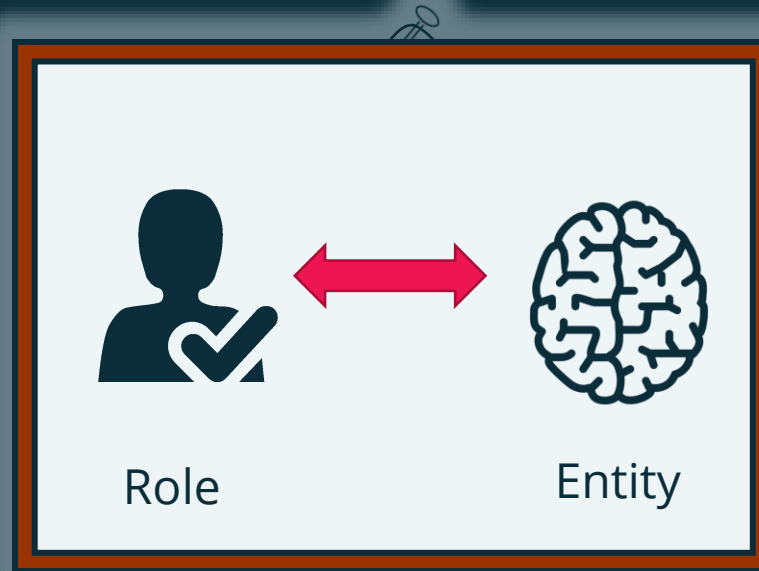
"Two directions of view"



"Permission"

"Two directions of view"

From the Entity's perspective: "Which roles am I entitled to?"



"Permission"



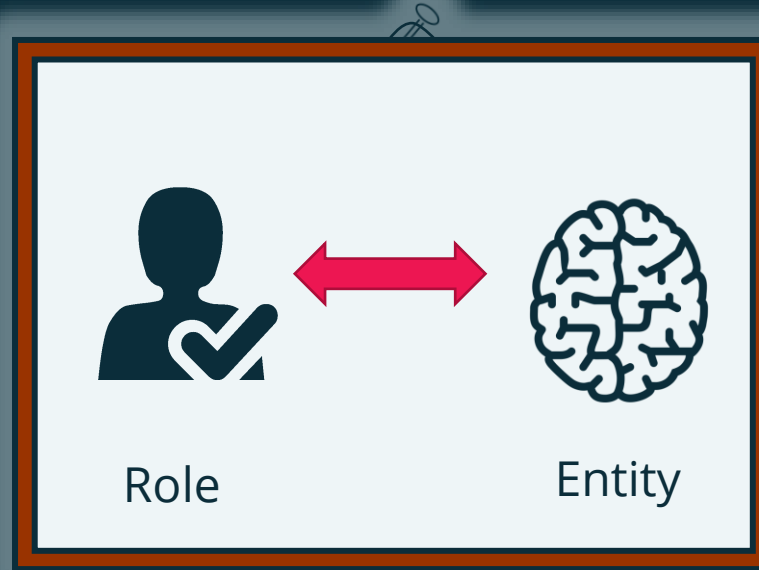
Context
"Permission"

"Two directions of view"

From the role's perspective: "Which Entitys am I entitled to?"



Context
"Role"



"Permission"

"Two directions of view"



Context
"Role"

Permission Overview | Permission Details | Employees | Logs

CUSTOM_Filter(all)_See_Companies
Filter(all)_See_Companies
0 User

Entity	Role	View	Create	Read	Update	Delete
Organisation_entity	CUSTOM_Filter(all)_See_Companies	●	●	○	✕	✕

Permission Overview | Permission Details

Organisation_entity
Company
former Org

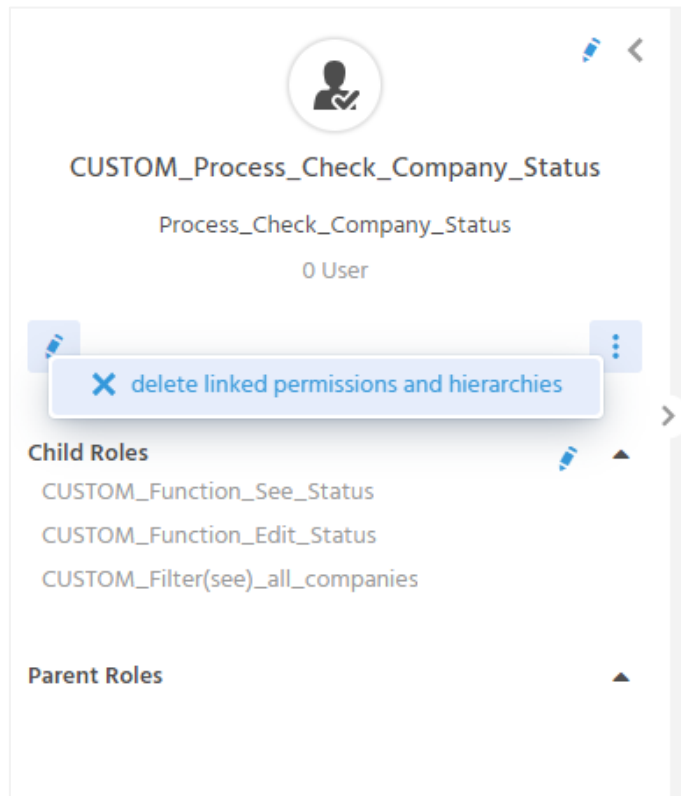
Role	View	Create	Read	Update	Delete
CUSTOM_Process_Check_Company_Status	●	✕	✕	✕	✕
CUSTOM_Filter(all)_See_Companies	●	●	○	✕	✕
CUSTOM_Filter(areas)_See_Companies	●	●	○	✕	✕
CUSTOM_Function_See_Status	●	✕	✕	✕	✕
CUSTOM_Function_Create_Offer	●	✕	✕	✕	✕



Context
"Permission"



Delete roles

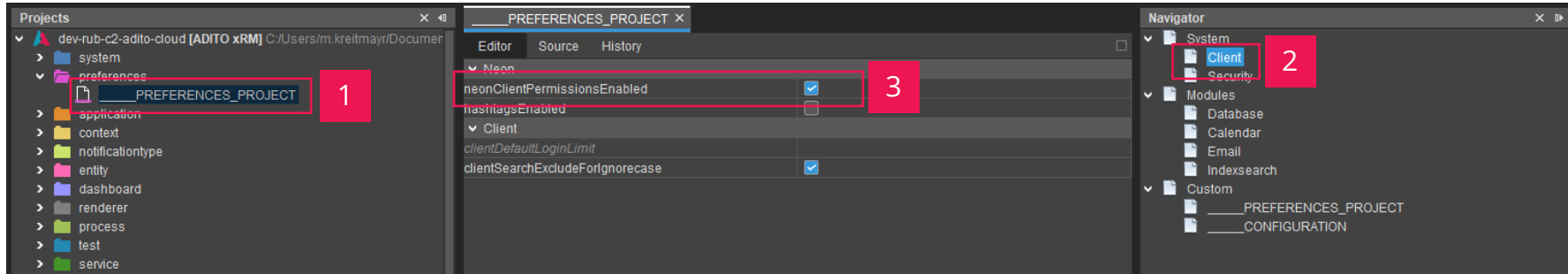


You can delete CUSTOM roles in the client if they are not linked to authorizations or are not used in hierarchies (role groups).

Procedure for deleting a role:

1. Execute Action "delete linked permissions and hierarchies"
2. Select role in FilterView or open the preview and execute Action "Delete"

Deactivating permissions



4 Deploy

5 Restart server

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