

# 8. Roles Ranking

**Roles** are arranged by **rank** to control who can create or assign roles at different privilege levels. A user can only manage (create/edit/assign) roles with a rank equal to or below their own. Higher-ranking roles appear at the top of the list (with lower rank numbers, such as 1), while lower-ranking roles appear below.

## Use Cases

### 1. Role-Based Access Control

A user can only manage (create/edit/assign) roles with a rank **equal to or below their own**, preventing unauthorized privilege escalation and ensuring secure role management.

### 2. Secure Role Visibility

Users can only see roles at or below their rank when creating or managing employees, eliminating confusion and maintaining appropriate permission levels.

### 3. Efficient Role Management

Admins can **drag and drop roles** to adjust the hierarchy, ensuring role privileges align with organizational needs and simplifying role administration.

## 1. Viewing the Roles Table

When you click **Roles** in the left-hand nav, the main pane displays every role in a table sorted by “Rank” (highest privilege at the top).

**Rank:** A number in the first column (1 = highest privilege), automatically assigned by order.

**Modules:** A list of module-tags showing what each role can access (e.g. Projects, Desks, Clients). Only the first few tags appear, with a “+X Show all” link to expand.

## Actions Icons

To the right, under **Actions**, there are three icons:

1. **Users:** View/assign employees who hold this role
2. **Edit:** Open the Edit-role panel to adjust permissions or template
3. **Delete:** Permanently remove the role

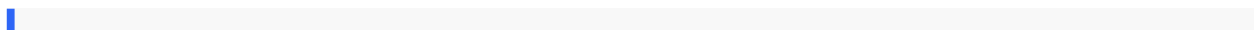
## 2. Editing a Role

Click the  pencil icon under **Actions** for the role you want to change.

The **Edit role** drawer appears, listing every module with View/Manage checkboxes (e.g., View own, View all, Manage own, Manage all).

Check or uncheck permissions as needed, then click **Save**.

## 3. Changing Role Rank (Drag-and-Drop)



**Why?** Drag-and-drop lets you reorder the hierarchy of roles—higher in the list = higher privilege.

### 3.1. Locate the Drag Handle

Look at the very left edge of the **Rank** column (the first column). You'll see a small vertical "pill" of dots ( : : ) next to each role's row. Hovering over it changes your cursor to a "move" icon.

### 3.2. Move the Role Up/Down

**Click & Hold** the dotted handle on the role you want to move.

**Drag** the entire row **up** to give it a **higher priority** (lower rank number), or **down** for **lower**.

**Release** to drop it into its new slot.

The role's **Rank** automatically updates to reflect its new position. For example, if you move a role above another that had a lower rank number, the dragged role now has a **higher** privilege (lower rank number).

### 3.3. Effect on Visibility

**Security safeguard:** If you drag a role **above** your own rank, you will **no longer** see it in any **Role** dropdowns when assigning to employees or tokens.

**Prevents privilege escalation:** A rank-4 user can't promote themselves (or others) to rank 3 or higher.

#### **Additional Visibility Restriction**

Users cannot see another employee's assigned role if that role has a higher rank than their own. In employee lists and role-related views, higher-ranking roles are hidden from users with lower rank.

This ensures:

1. Sensitive privilege levels are not exposed
2. Hierarchical boundaries are preserved
3. Users cannot infer or interact with roles above their authority

## 4. Assigning Roles to Employees or Tokens

“ After ranking roles appropriately, you'll assign them—but you'll only ever see roles at or below your own rank.

### 4.1. Add Employee

In the **left-hand nav**, click **Employees**.

In the top-right of the Employees table, click + **Add**.

In the **Add employee** drawer, locate the **Role** dropdown under **General**.

Only roles whose rank is at or below your rank appear.

#### 4.2. Create Identification Token

In the **left-hand nav**, expand **Security** and click **Identification tokens**.

Click + **Add** at the top right of the Tokens table.

In the **Add identification token** drawer, find the **Role** dropdown.

Again, only roles at or below your rank are listed—higher-rank roles are hidden.

For instance, if your user is rank 4, you'll only see rank 4, 5, 6... roles listed—rank 3 or above won't appear.

## Why Role Ranking Matters

1. **Security:** Prevents unauthorized privilege escalation (e.g., a mid-level user granting themselves “super admin” powers).
2. **Project Scope:** Ensures a manager who only oversees one project can't create or assign roles that exceed their scope.
3. **Consistency:** Keeps the system organized, with each user limited to assigning roles matching their authority level.

### “ Example Scenario

#### 1. Admin Role at Rank 4

The “admin” user sees and can assign roles at rank 4, 5, 6, etc.

#### 2. QATestRole at Rank 5

Admin at rank 4 can't drag roles above it's own rank order(4).

This ensures Admin doesn't accidentally (or intentionally) grant privileges beyond their own.

Role ranking also impacts access to configuration features. Users can only modify system-level settings, including action subtype ordering, if both their permissions and rank allow it.

In short, Role Ranking is a fundamental security feature. It keeps your platform's environment safe by ensuring users can only create, assign, or manage roles at or below their rank, preventing privilege escalation and maintaining clear permission boundaries across the platform.

Revision #19

Created 26 February 2025 23:23:06

Updated 20 May 2026 13:12:21 by Anastasiia Rudaya