

Associate Roles to Categories

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In Cora OpsManager, based on the roles assigned to the users, you may restrict the users from creating cases for a particular Category. The Roles are associated to Categories such that only the users with the specified roles are allowed to choose the category at the time of manual case creation.


NOTE

In case no specific Role(s) is associated to a Category, then by default, all Roles are permitted to select the Category on Manual case creation.

To associate Roles to Categories, follow the steps below:

1. On Flowtime, go to **Ops Manager > Ops Manager Admin > Category-Role Association**.
2. From the list, select the category to which roles are to be associated.

The screenshot shows the 'Category-Role Association' page in Cora OpsManager. The sidebar on the left contains navigation options, with 'Category-Role Association' highlighted. The main content area displays instructions and a search bar for 'Name'. A red box highlights a link that says 'To add role click here'. Below this, there is a section for 'Claims' with a 'Refresh' button and a 'Role' dropdown menu. A red box highlights the 'Claims' section, which includes a '+ Add New Role' button, a search bar for 'Role', and a dropdown menu currently showing 'Claims'. Below the dropdown, there is a green checkmark icon and a red X icon. At the bottom of the 'Claims' section, there is a pagination control showing 'Page size: 5' and '1 items in 1 pages'. Below the 'Claims' section, there are other categories listed: 'Finance', 'Insurance', 'IT Issues', and 'IT Issues-Bella'. At the bottom of the page, there is another pagination control showing 'Page size: 5' and '26 items in 6 pages'.

3. Click **+ Add New Role**.
4. From the drop-down, select the Role to be associated to the Category. This list displays all the roles available in Cora OpsManager.
5. Click  .

You can also add new roles to Cora OpsManager from this page. Click the link on **To add role click here**. An Employee Roles pop-up window appears. Click + Add New Record to add a new role.