# 16 Hierarchical roles and user profiling

You can access the **Check User Login** section using the Settings item, present in the menu of the avatar in the top right corner. Here you can define and customise vtenext users in order to guarantee data confidentiality, managing access and data use privileges.

Through the **Users, Roles, Profiles, Sharing Access, Advanced Sharing Access** and **Groups** items, you can define the users able to use only specific areas of vtenext. In our opinion it is useful to start defining the users (this is as the prerogative of the administrator user) only when you have decided which of the business processes you want to manage with vtenext and not before familiarising yourself with the system. User and access management is a powerful tool that provides a wide degree of versatility in the construction of the structure, also with CRM in Multi-company mode.

In addition, vtenext allows you to monitor use by tracking actions (**Audit Trails** tool), with the guarantee of always knowing "who did what" and set privileges accordingly.
The management of security and access to information is based on the **Roles** system, which makes configuration simple, as it is not necessary to create a profile for each user, but simply to associate to one already present. The management of roles is fundamental in medium-large businesses in which we find dozens of users with different hierarchical roles.

**In particular it is useful for:**

- having a large number of people working with CRM simultaneously;
- checking the rights of modification, cancellation and reading;
- respecting the corporate organisational chart.

Through profiles and access levels, Roles allow you to profile vtenext users so that everyone can see only the information that is of interest to them, thus ensuring the confidentiality of data between users and the levels of the company organisation chart.

**TYPES OF USERS in vtenext**

1. Standard user: has limited access and cannot access the Settings menu
2. Administrator user: is able to administrate all the entities of vtenext

Users, groups and their privileged access:

- Customise the user interface;

- Create communication archives;
- Change password, deactivate users and view login history;
- Manage profiles by assigning privileges to read, create/edit, delete vtenext data.

The correct order to proceed with the configuration of the company structure is as follows:

- Creation of Profiles;
- Creation of Roles, to which the Profiles are associated;
- Creation of Users, to whom the Roles are associated;
- Modification of user-role associations based on organisational needs;
- Creation of any groups.

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