

TaskForge IT

Roles & Permissions Reference

Exactly what each role can see and do across the platform.

Overview

TaskForge uses role-based access control - not everyone with a login can do everything. There are five roles: Technician, Senior Technician, Manager, Accounts, and Read Only. This guide covers exactly what each one can access, page by page.

1. Job Cards

Page	Tech	Sr Tech	Mgr	Acc	RO
Active Jobs	✓	✓	✓	✓	✓
Completed Jobs	✓	✓	✓	✓	✓
Archive	—	✓	✓	✓	✓

2. Operations

Page	Tech	Sr Tech	Mgr	Acc	RO
Daily Site Checks	✓	✓	✓	—	✓
Assets	✓	✓	✓	✓	✓
Stock	✓	✓	✓	✓	✓
Maintenance	✓	✓	✓	—	✓
Handover Log	✓	✓	✓	—	✓
Shared Files	✓	✓	✓	—	✓

3. Network

Page	Tech	Sr Tech	Mgr	Acc	RO
System Status	✓	✓	✓	—	✓
IP Address Book	✓	✓	✓	—	✓
RMM Devices	✓	✓	✓	—	—
Remote Access	✓	✓	✓	—	—
Discovered Devices	✓	✓	✓	—	—
UniFi	✓	✓	✓	—	—

4. Management

Page	Tech	Sr Tech	Mgr	Acc	RO
Licenses	✓	✓	✓	✓	✓
Dashboard	✓	✓	✓	✓	—
Reports	—	✓	✓	✓	✓
Executive Dashboard	—	✓	✓	✓	—
Live Map	✓	✓	✓	✓	✓
Client Map	✓	✓	✓	✓	✓
Sales Pipeline	—	✓	✓	✓	✓
Expense Claims	✓	✓	✓	✓	✓
Branches	✓	✓	✓	✓	✓
Clients	✓	✓	✓	✓	✓
Vehicles	—	✓	✓	✓	✓
SLA Policies	—	✓	✓	✓	✓
Health & Safety	✓	✓	✓	✓	✓
Compliance Documents	✓	✓	✓	✓	✓
Calendar	✓	✓	✓	✓	✓

5. Accounting

Page	Tech	Sr Tech	Mgr	Acc	RO
Accounting Templates	—	—	✓	✓	—
Quotes	—	✓	✓	✓	✓
Sales Orders	—	—	✓	✓	✓
Purchase Orders	—	—	✓	✓	✓
Job Invoices	—	✓	✓	✓	✓
Statements	—	—	✓	✓	✓

6. Tools

Page	Tech	Sr Tech	Mgr	Acc	RO
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IT Reference Console	✓	✓	✓	—	—
Printer Reference	✓	✓	✓	—	—
Knowledge Base	✓	✓	✓	—	—
Staff Directory	✓	✓	✓	—	—
Notice Board	✓	✓	✓	—	—
Vendor Contacts	✓	✓	✓	—	—
Credentials	✓	✓	✓	—	—
Alert Rules	—	✓	✓	—	—
Settings	—	✓	—	—	—

Job Card Sign-off Process

Sign-off requirements scale with the role raising the job:

Role	Sign-off requirement
Technician	Three sign-offs required: the technician, a Senior Technician/Manager/Accounts reviewer, and the client (by email if not physically present).
Senior Technician / Manager	A single sign-off from the Senior Technician or Manager, with the client able to sign off too, optionally.
Accounts	A double sign-off process, involving Accounts and/or the client.
Read Only	Cannot sign off job cards at all, but can view, print, and access other information available to the role.

Role Summary

Technician

Primarily focused on doing the work. Full access to jobs, assets, stock, network information, RMM, remote access, operations, maps, clients, and expenses. Leave is application-only, and technicians cannot reach administrative controls such as SLA policies, accounting administration, or system settings.

Senior Technician

Everything a Technician has, plus supervisory and operational control: the job archive, reports, the executive dashboard, the sales pipeline, SLA policies, vehicles, accounting documents, alert rules, settings, and additional sign-off authority.

Manager

The broadest operational role, spanning technical operations, HR, accounting, and reporting. Managers can approve leave, manage accounting functions, access executive reporting, sign off jobs, manage SLA policies, and reach system management functions.

Accounts

Focused on financial and administrative operations, while retaining access to important management information. Can manage accounting templates, quotes, sales orders, purchase orders, job invoices, and statements; approve leave; access reports; and participate in job sign-offs.

Read Only

Designed for users who need to see information without making operational changes or signing off work. Access to selected jobs, reports, maps, clients, accounting documents, compliance information, and other read-only business information. Cannot sign off job cards.