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User Roles

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In direct response to user requests, buildings are now decoupled from the form default and max permission settings. **User Groups** have become **User Roles** allowing for an easier, faster workflow when adding/updating users' access to documents. The **User Roles** option has replaced the **User Groups** option when visiting **Settings** in the left menu.

Highlights from the **User Roles** update:

- **Decoupled buildings and form permissions**: User roles and building permissions are now separated from one another. This allows users to have default and max permission settings set by user roles in any building the user is given access to. For example, if a user is a **View Admin** (having a default and max permission for all forms of **Can View**), an admin user can visit the user's **Basics** tab and select any buildings the user needs to view under the **View Admin** role.
    - Tip Hovering over a user role from the **Users** tab will show all the buildings the user is associated with in a particular role.
- **Form Group filtering**: When creating or editing a user role, admin users will be able to filter on **Form Group** (i.e. Special Education) allowing faster form selection for updating default and max permissions in bulk.
- **Role merging**: Similar roles can be merged into a new role.[1] The new merged role will be added to all users that were previously assigned the unmerged roles, and retain access to buildings that were previously assigned to the user.
- **Delete/Undelete User Roles**: Roles that have been merged into a new role will automatically be deleted to reduce confusion. These roles can be undeleted by an admin user. The undeleted roles will be automatically readded to users who were previously assigned the deleted roles.

- **New filtering options on the Users tab**: Find users with specific roles and buildings quickly by using the **all buildings** and **all roles** filter dropdowns in the blue bar of the **Users** tab. You can also see all admins by clicking the **Admin** checkbox and clicking **Search**. This allows an admin user to quickly see who is assigned to a user role and in which buildings.

1. Existing permissions have been rolled over from previously existing **User Groups**. All user groups that had identical permission settings have been systematically merged into a single role, with buildings being separated on a user by user basis. Remaining duplicate roles created from buildings with different permissions in **User Groups** appear with a parentheses and number. These roles should be merged by an admin user in the district. For example, an admin user may want to combine all duplicate GenEd - Elementary (1),GenEd - Elementary (2), GenEd - Middle, and GenEd - High School user roles into a single GenEd role.