samegoal

Assign User Roles

Assign user roles

Steps *To assign an individual user user roles*

1. Visit **Users** in the left menu.
2. Search for the user you wish to assign user roles to.
3. Visit their **Basics** tab.
4. Under **Permissions** click the **User roles:** dropdown menu > select the role(s) to assign to the user.
5. Click the **no buildings** dropdown menu > select the building(s) to assign to the user.
6. Click the **Update user** button.

Tip If a user is assigned a role without any buildings, the user will have a default permission of none and a max permission of owner for all forms.

Steps *To assign user roles in bulk*

1. Visit **Users** in the left menu.
2. Check the users you wish to bulk assign user roles to.
3. Click the **Actions** dropdown menu > select **Assign User Roles**.
4. Click the **User roles:** dropdown > select the role(s) to assign to the users.
5. Click the **no buildings** dropdown menu > select the building(s) to assign to the users.
6. Click **Add** to assign the selected roles and buildings to the selected users.
7. Click **Cancel** to return to the **Users** page.

Assign buildings

Buildings are assigned to users for any user role on a per user basis. A user can be assigned to one or more user roles and to one or more buildings for any given role.

A user cannot see students or documents in buildings they do not have permissions for.

Steps *To assign buildings to an individual user*

1. Visit **Users** in the left menu.
2. Search for the user you wish to assign user roles to.
3. Visit their **Basics** tab.
4. Under **Permissions** find the user role you wish to add buildings for.
5. Click the **no buildings** dropdown menu > select the building(s) to assign to the user.
6. Click the **Update user** button.

Steps *To assign buildings in bulk*

1. Visit **Users** in the left menu.
2. Check the users you wish to bulk assign user roles to.
3. Click the **Actions** dropdown menu > select **Assign User Roles**.
4. Find the user role you wish to add buildings for.
5. Click the **no buildings** dropdown menu > select the building(s) to assign to the users.
6. Click **Add** to assign the selected buildings to the selected users.
7. Click **Cancel** to return to the **Users** page.