Manage User Roles

- Create a user role
- Update a user role
- Merge user roles

Create a user role

Steps *To create/add a user role:*

1. Visit **Settings** > **User Roles**.
2. Click **+add user role** in the blue bar.
3. In the **Role name:** field, enter a name for the user role (e.g. Principals, GenEd, SpEd). The role name can also be updated after it is created by visiting **Settings** > **User Roles** > clicking into the role > update the name > click **Save**.
4. Scroll to each form you wish to assign permissions to. Alternatively, you can visit **Form Group Filter** in the blue bar > click **Clear** > select only the desired form groups you would like to add to this user role (e.g. Special Education) > click **OK**. Select the default permission and maximum permission of each form type to apply the permissions to.
5. Click the **Save** button in the blue bar.
6. Once you save changes to the user role, you can switch to the **Reports** tab to allow access to specific reports. Changes to this tab will save automatically.

Tip By default only active forms within the environment are shown on the **Forms** tab. If you would like to include deleted forms visit the **Show: All Forms** dropdown and select **Show: Deleted**.

Tip If you're only interested in seeing forms in a specific program, you can filter forms by program by clicking on the **Form Group Filter**. You can also filter forms by program on the **Reports** tab by clicking the **all categories** dropdown.

Tip You can also bulk assign default permissions and max permissions by selecting the check boxes on the left hand side of the forms you wish to the same permissions for.

You may select all visible form types by clicking the checkbox dropdown in the blue bar. Visit the **Set Default** dropdown and **Set Max** dropdown and select the access the user roles should have for the selected forms. This also works for assigning form permissions.

Update a user role

Existing user roles can be updated at any time.

Steps *To update permissions for a user role:*

1. Visit **Settings** > **User Roles**.
2. Search for the user role you wish to update permissions for. Click on the role name.
3. Update permissions as needed.
4. Click the **Save** button in the blue bar.
5. Once changes are saved, you can navigate to the **Reports** tab to update report permissions.

Tip When new forms are added, by default, the default and maximum permission for the new form is set to **None** for all existing user roles. In order for non-admin users to have access to new forms, an administrative user needs to update user roles and change the permissions for the new form to **Can View** or higher. When new reports are added, by default they will be unselected and users with the role will not have access to the report.

Merge user roles

User roles may be merged as needed. When one or more user roles are merged, any users who were assigned the unmerged role will have the new role assigned to them. They will still have access to all the buildings that were previously assigned on a per user basis.

Steps *To merge user roles:*

1. Visit **Settings > User Roles**.
2. Click the checkbox next to the user roles you wish to merge (this must be two or more).
3. Click on the **Actions** dropdown menu in the blue bar > select **Merge**.
4. Fill in the **Merged role name:** in the blue bar.
5. Confirm that the new **Default** and **Max** permissions are the desired permissions for the merged role. NOTE: The merge screen takes the highest permissions that were previously given in the selected roles (e.g. If the **Default** permission for an IEP was **Can View** in one role and **Can Edit** in another, it will give the **Default** permission of **Can Edit**). We recommend confirming the desired **Default** and **Max** permissions before merging the roles.
6. Click **Merge** in the blue bar to merge the roles or click **Cancel** to return to the **User Roles** screen without merging the roles.
7. Report permissions will automatically be set as the union of the previous roles. After the roles have been merged you can update report permissions for the new role.

Tip Once roles have been merged, the unmerged roles will be deleted and removed from any user they were assigned to. If necessary, an admin user may undelete the user role(s), and they will automatically be reassigned to the users. The newly merged role will also remain and need to be deleted if merged in error.