

User Roles

When to create user roles

By default, all users not assigned a user role have access to:

- Create documents of any form type throughout the program for any student district-wide.
- Own, edit or view any documents they are explicitly added to by another user for any student district-wide.

This simple model works well for many districts. Generally, staff do not start unnecessary documents for students (they have enough to do already!), and they are not able to access any other documents they have not been given access to.

However, as an administrator you may choose to leverage user roles when:


- You want to give some users **default** permissions to certain types of documents
- You want to limit some users' abilities by setting **maximum** permissions for certain types of documents
- You want to limit user's access to students in certain **buildings**
- You want to allow users to run reports


Once user roles are created, they can be applied to users throughout the district. Each user may belong to zero or more (multiple) user roles, and one or more (multiple) buildings.

 **Tip** For more information about managing user roles, please see Manage User Roles.

What is a user role

Each user role can be thought of as a set of form and report permissions for a group of users. For each report, a user role determines whether or not the user has access to run the report. For each form, a default permission and maximum permission can be set.

- **Default** - The default document permission a user role member has for all documents of a given form type (unless their access is increased when they are explicitly added to a document or create a document themselves). For example, a user may have default **Can View** access for all IEPs, but have **Is Owner** access for any IEPs they create themselves or **Can Edit** access on IEPs they've been added to.
- **Max** - The maximum document permission a user role member have for all documents of a given form type. Administrators and document owners cannot increase users' access when adding them to documents explicitly beyond this permission. For example, a user with a user role that has a maximum **Can View** document permission for IEPs cannot have a document transferred to them, since their permission post-transfer would be **Is Owner**.
 -  **Tip** In order to be able to create a document of a given form type, **Max** permission must be set to **Is Owner**.

 **Tip** When a user runs a report, the results that are returned will only be based on data pulled from documents the user has access to.

User role permissions

Form permissions

Below are the possible form permission combinations (**Default** and **Max**) that can be assigned for each form and what they mean.

Default	Max	Meaning
None	None	The user cannot create, edit, or view this form. They have no access to this form.
None	View	The user can't create or edit this form. They need to be added by someone else before being able to view the form.
None	Edit	The user can't create this form, but they can edit the form if someone else adds them to the form.
None	Owner	The user can create new forms of this type, but can't edit existing forms of this type unless someone adds them to the forms.
View	View	The user can view this form for any student in their building(s) without someone else needing to first add them. They can't create or edit this form.
View	Edit	The user can view this form for any student in their building(s) without someone else needing to first add them. Before they can edit this form, someone else needs to add them to the document with "can edit" access. They can't create this form.
View	Owner	The user can create this form and can view any of these forms without having to be added first.
Edit	Edit	The user can edit this form for any student in their building(s) without someone else needing to first add them. They can't create this form.
Edit	Owner	The user can create this form and can edit any of these forms without having to be added first.
Owner	Owner	The user can create new and edit any existing forms of this type in their building(s).