

Create or Edit Roles

Table of Contents

Create or Edit Roles i
Create or Edit Roles 1

Create or Edit Roles

Security Administration > Create/Edit Roles

This page is used to create new roles or edit existing roles. You can add or edit roles for which a security component is required. Additionally, you can establish permissions for the various roles; for example, you can assign a database administrator permission to the Finance application.



To avoid any system issues related to roles, be sure to keep Business and Student roles separate and ensure that Business roles do not have campuses assigned.

You can generate the Security Administration > Reports > List of Users by Permission report to review user details such as the last login date and then modify as needed.

Create a role:

❑ From the Manage Roles page, click **Create New Role**.

The Create Role page is displayed.

Role Name	Type the name of the role to be created.

❑ Under **Manage Permissions**:

- Click + - to expand or collapse available role permissions.
- Select the permissions to be added to the role. Once permission is granted to a component, the title is displayed in green and the associated check box is selected.
- Multiple applications can be added to a role.
- Multiple roles can be added to a user.

❑ Click **Save**. The new role is displayed under **Select a Role**.

You can continue creating roles as needed.

Edit a role:

❑ From the Manage Roles page, you can type a role name in the **Search Roles** field. As you type the role name, the existing roles that match the typed data are displayed under **Select a Role**. The **Edit Role** and **Delete Role** buttons are enabled.

❑ Select the role to be edited.

❑ Click **Edit Role** to edit the selected role. The Edit Role page is displayed with the selected role name in the **Role Name** field and the existing role permissions.

❑ Under **Manage Permissions**, add or remove components (i.e., permissions to a page/menu). Any changes made to a role are effective to all users who are assigned to that role.

Notes:

- Selected components are displayed in green.
- An application with a component that is not selected is displayed in green italics. For example, if a component under Test Scores is not selected, then Test Scores is displayed in italics denoting that not everything under Test Scores has been granted permission.
- For those components with a read-only capability and **read-only** is selected, the component is displayed in orange. Read-only access limits the user to only be able to view data on a page. The component must be selected along with the read-only option.
- For Budget and Finance, an All Historical File IDs read-only option is available allowing users to view all file IDs when logged on to the application if the option is selected. If the option is not selected, the user can only view the current year.

❑ Click **Save**.

Delete a role:

❑ From the Manage Roles page, you can type a role name in the **Search Roles** field. As you type the role name, the existing roles that match the typed data are displayed under **Select a Role**. The **Edit Role** and **Delete Role** buttons are enabled.

❑ Click **Delete Role** to delete a role. A pop-up window prompts you to confirm that you want to delete the role.

- Click **OK** to delete the role.
- Click **Cancel** to not delete the role.

A message indicating that the role was deleted successfully is displayed at the bottom of the page.