



Roles

## Roles

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## Introduction

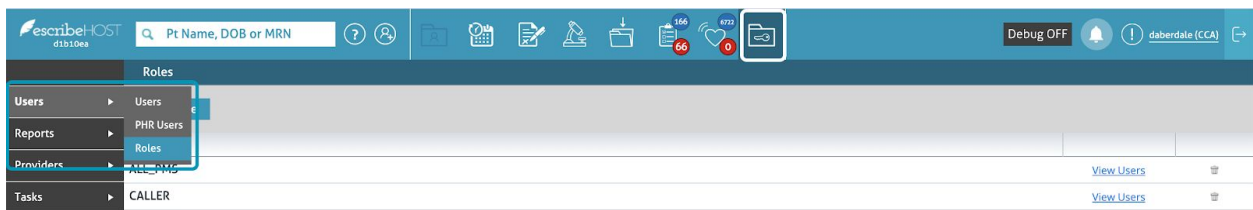
A **Role** is a pre-defined collection of permissions that account owners can create in order to easily assign the same set of permissions to various users. *Roles do not replace permissions*, but are a useful complement to assign more than one user with the same set of permissions **with just a few clicks**. Users can also have additional permissions outside the ones provided by a given role.

This training document presents the step-by-step process to create, edit, assign and delete roles.

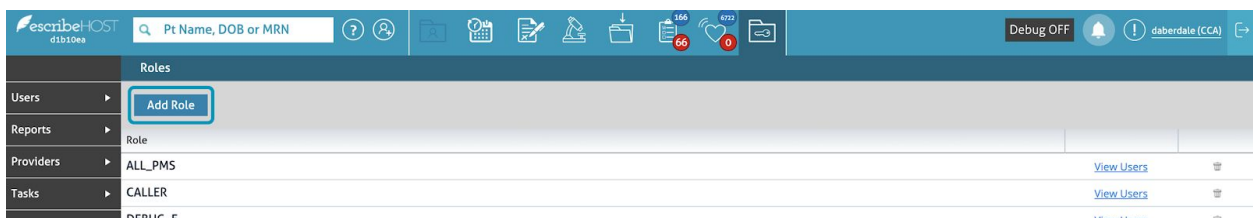
## Create a New Role

In this section you will learn how to add new roles.

In order to create a new role, go to the **Admin** module on the top navigation bar and select **Users** from the menu on the left. Click **Roles** from the dropdown menu

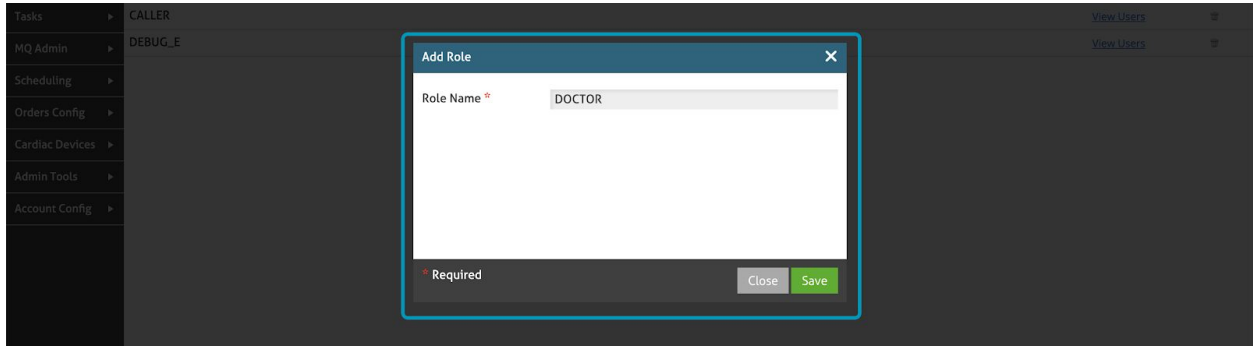


Click the **Add Role** button to add a new role.



A popup will display. Write the **Role Name** in the field provided.

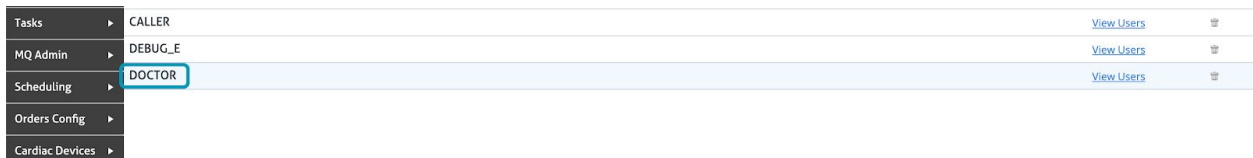
**NOTE:** All roles must have a name. The role name cannot exceed 7 characters, and can include only uppercase letters A-Z, digits 0-9, and underscores.



## Edit a Role

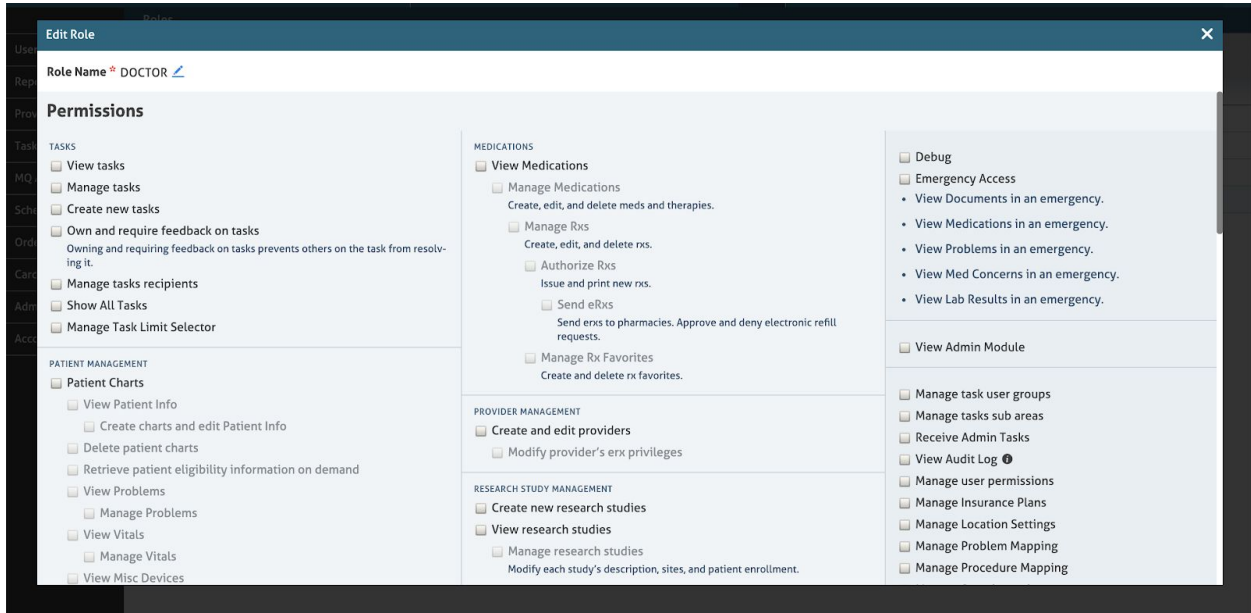
In this section you will learn how to edit role names and permissions.

Click the role name to edit the permissions.

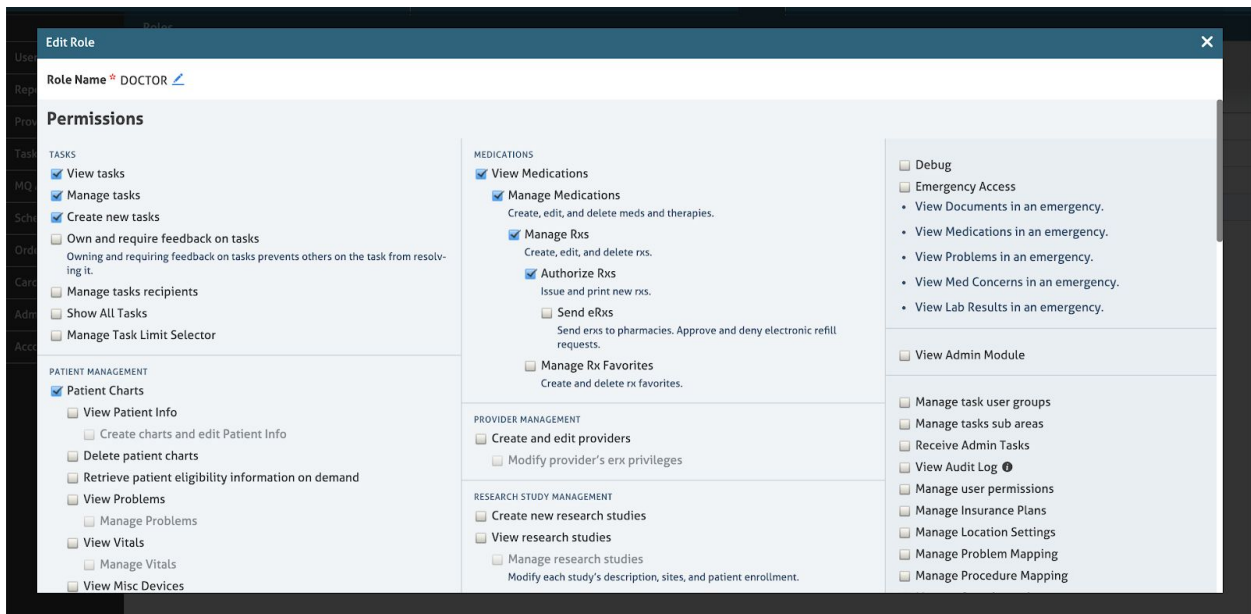


A pop-up displays that allows you to add or remove permissions to that role. Click and select the checkbox next to the permissions of your choice.

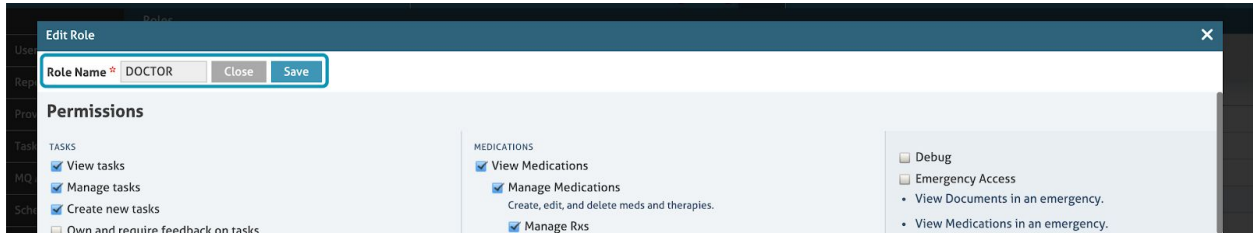
**NOTE:** You cannot remove a permission for which there are nested permissions or add a nested permission without its parent permission.



The changes apply automatically when clicking on checkboxes. Users need to log out and log back in for changes to be reflected to their user permissions.



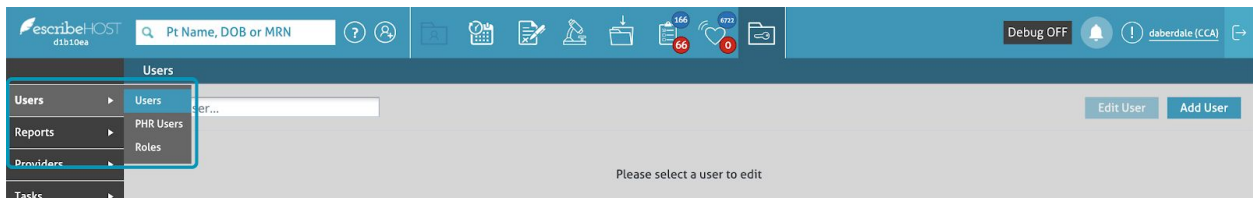
You can edit the name of the role in this step, as long as you meet all the requirements mentioned above.



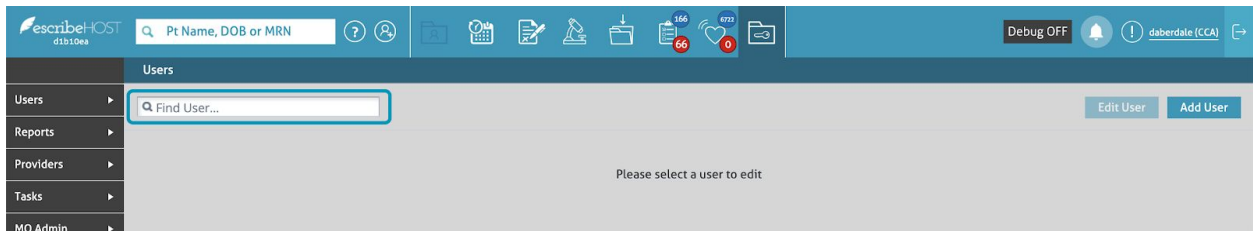
## Assign Roles to Users

In this section you learn how to assign existing roles to users.

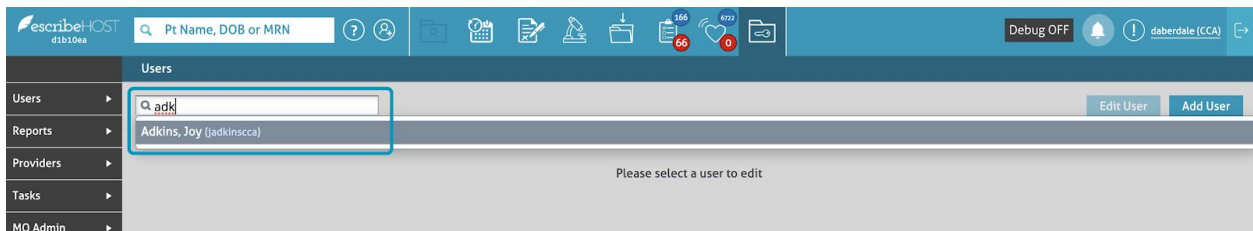
In the Admin module, go to **Users** and select **Users** from the dropdown menu.



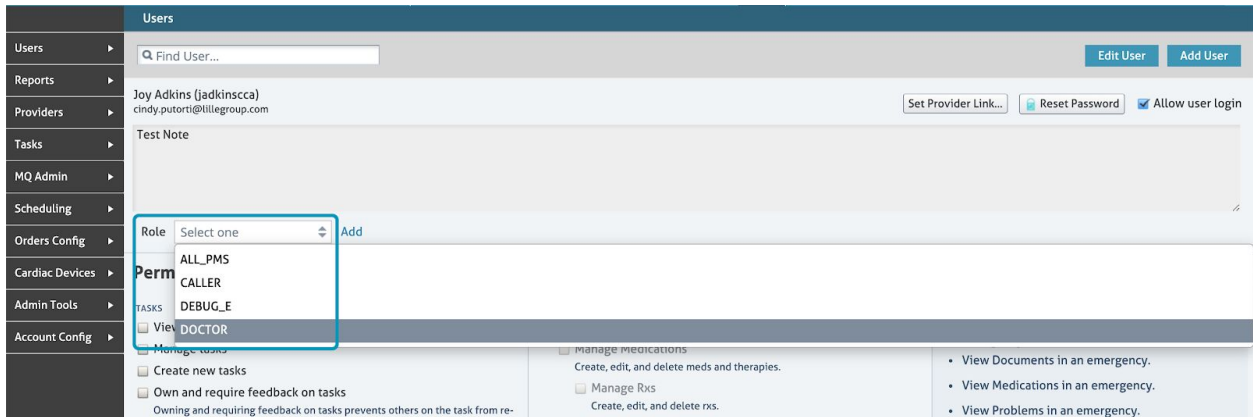
Use the **Find User...** search function to find the user you want to assign to a role.



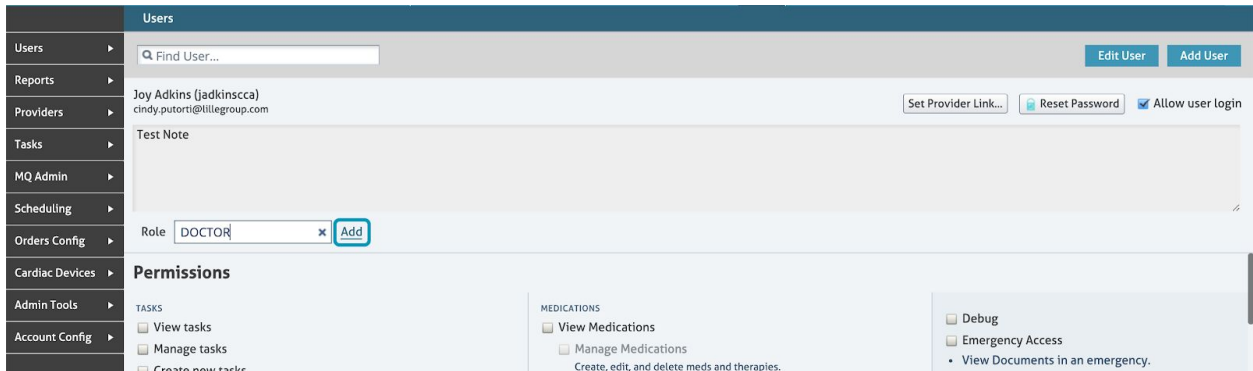
Click the **User** name to select it.



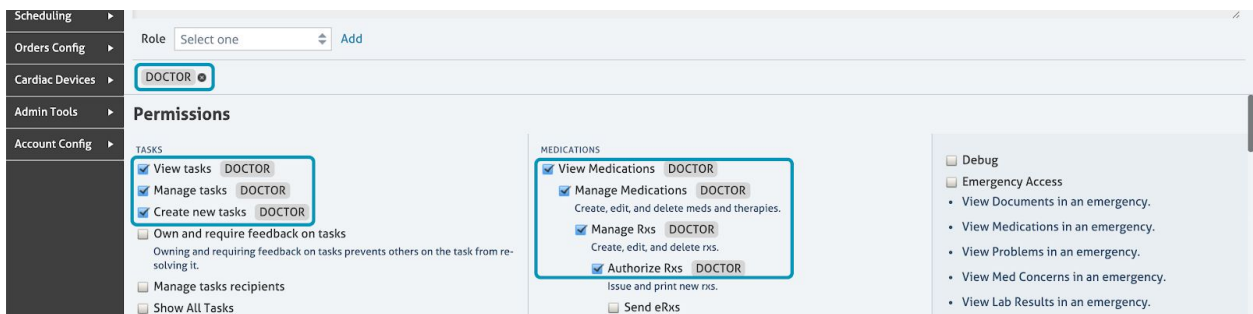
Select a **Role** from the dropdown menu.



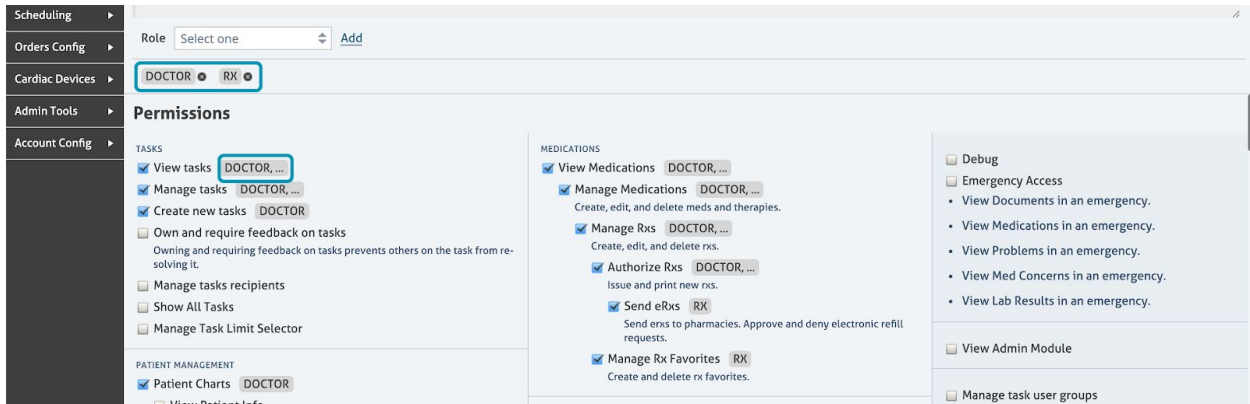
Click the **Add** button to assign that role to the user.



The permissions assigned to that role are now assigned to that user. A label with the role name displays next to the permission.



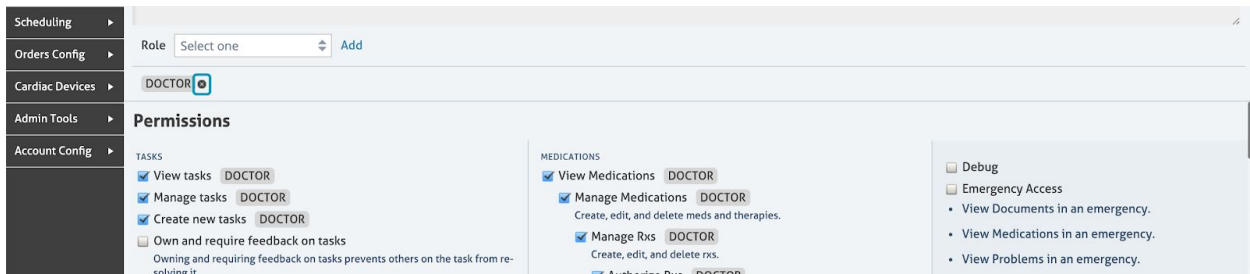
It is possible to assign two or more roles to the same user. All the roles assigned to a user display on a ribbon below the **Role** dropdown.



## Unassign Roles

In this section you will learn how to remove a role and its attached permissions from a user account.

In order to unassign a role, go to the user and click the **X** next to the role.

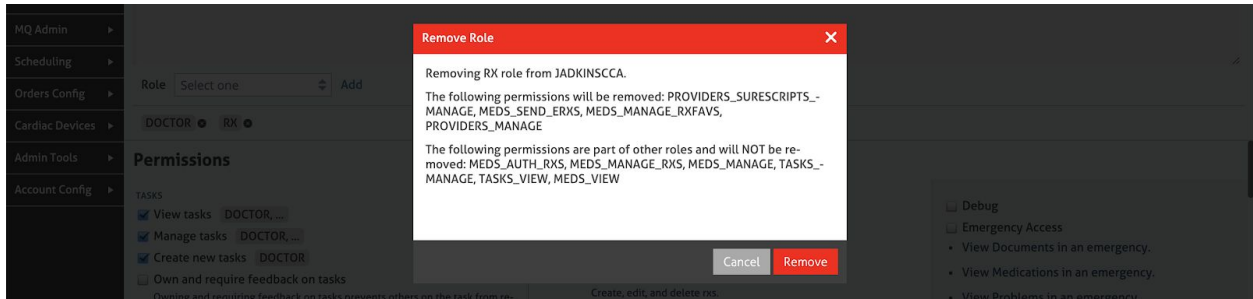




A pop up will display with the list of permissions you will remove.

**NOTE:** If the user has more than one role and those roles share permissions, the shared permissions will not be removed.

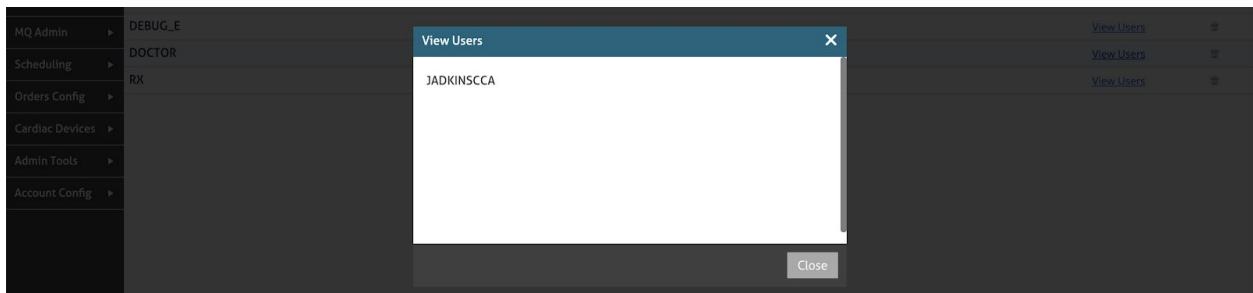
Click the **Remove** button to accept the change. It will be effective immediately but the user might need to log in and out to see it reflected on their account.



## Delete a Role

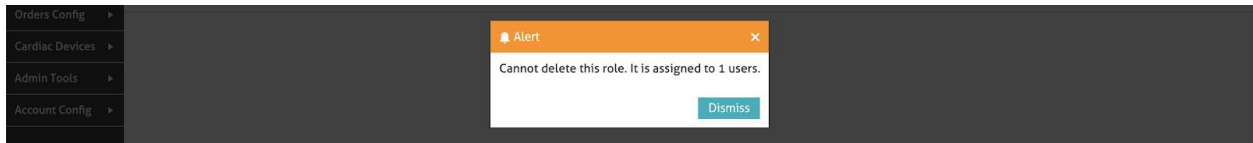
In this section you learn how to delete roles.

Before deleting a role, make sure it is not assigned to any users. Go to the **Roles** section in the **Users** dropdown and click the **View Users** link next to a Role.

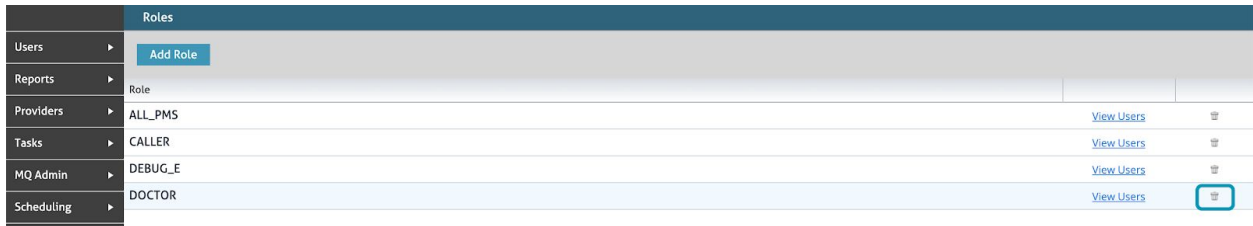


	Roles	
Users	<a href="#">Add Role</a>	
Reports	Role	
Providers	ALL_PMS	<a href="#">View Users</a>
Tasks	CALLER	<a href="#">View Users</a>
MQ Admin	DEBUG_E	<a href="#">View Users</a>
Scheduling	DOCTOR	<a href="#">View Users</a>
Orders Config	RX	<a href="#">View Users</a>

You cannot delete a role that is currently assigned to users.



Once the role is not assigned to any users, click the **Bin** icon next to the role to delete it.



A pop-up will display. Click the **Delete** button to complete the process

