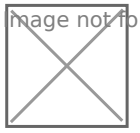
Manage Users - Role Assignment

A user can assume different roles other than just having employees report to him. E.g. in some cases, a user can be expected to approve training requests from employees not reporting to him. Or he can be expected to manage training events. In both these examples the user was assigned a specific role to execute the responsibilities and that is the objective of this section.

To assign a role to a user, follow these steps:

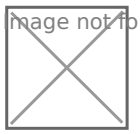
- Open the List of Users screen and select the user to assign reporting access.
- Select **Role Assignment** from the side menu bar to display the list of roles a user is currently linked to.



User Role List

A list of user roles is displayed. The following functionality is available:

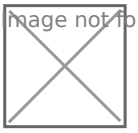
- Search criteria
- Add New Role
- Delete
- Add Multiple Roles



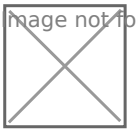
Add a User Role

Click on Add to open the User Role Detail screen below.

To select a role, click the hand picker to open the **Available Role List** screen.



- Select the appropriate role and click **Select** to update the **User Role Detail** screen.
- If you are happy with this role, click **Save** to display the detail for the selected role.

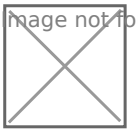


- Use the screen below to more specifically stipulate what this role is allowed access to.
- From the complexity of this screen, it can be understood that between two users, linked to the same role, there can be a difference in access levels.
- When the **User Role Detail** page is saved, the user is returned to the updated **User Role List** screen.
- Continue in this fashion to assign more roles to a user.

Delete a User Role

To delete a user role, follow these steps:

- Open the **User Role List** screen and select the role to be deleted.
- Select the delete check box and click **Delete** for the role to be deleted.
- When you confirmed the delete action, the record will be permanently removed.



Add Multiple Roles

This functionality enables you to assign multiple roles on one screen using drop down list boxes as shown below.

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