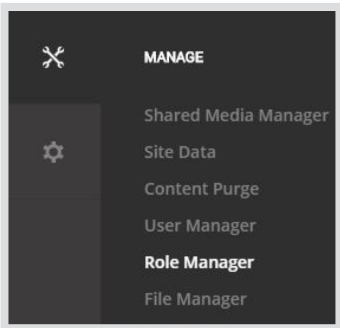
Role Manager

Updated March 16, 2023



Role Manager

Overview

The Role Manager tool is used to create or edit user roles for your site. Roles help when you need to give certain users restricted access to pages and modules while multiple people are working on one site. Modules and pages have permissions you can set depending on roles. If you want to grant certain users access to specific pages or modules, you need to create roles

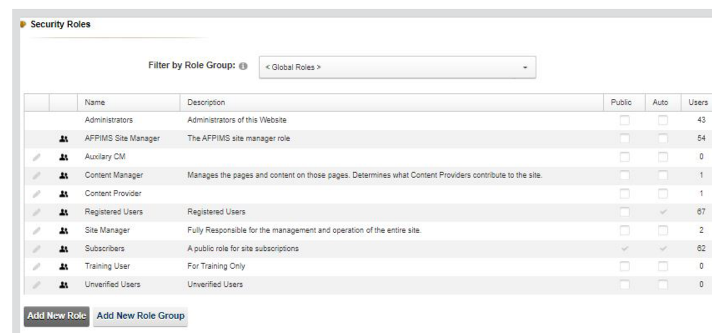
User Manager PDF   Permissions PDF

Roles

Each site may have unique user roles, but all sites come with some standard roles. Although you have free reign to give any permission to the custom roles on your site, the following standard roles should have "**View**" permissions **ONLY**:

- All Users
- Registered Users
- Unauthenticated Users
- Unverified Users

***NOTE: Under NO circumstances should the above four security roles have any page or module permissions other than "View." Giving these roles "Edit" permissions causes security concerns and can result in you losing access to your site.**



Security Roles

Add New Role

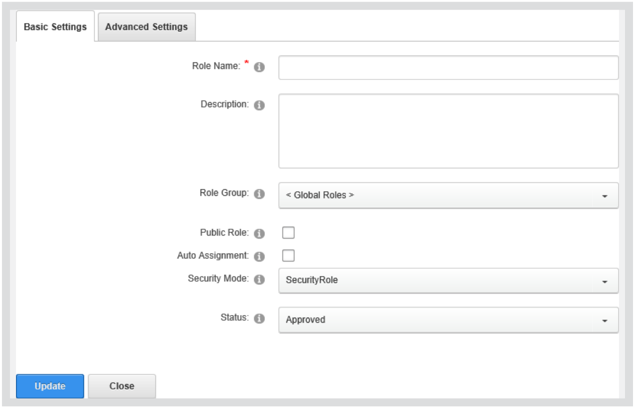
To access the **Role Manager**, hover over the **Manage** icon on the Persona Bar and click on **Role Manager**.

Add New Role Button

To add a **New Role**:

1. Click on the **Add New Role** button.
2. On the **Basic Settings** tab, complete the following sections:
    a. **Role Name**: This is the name of the role as you would like to see it in the roles drop-down menu. The name should be descriptive enough to define the type of role, such as: Site Manager, Content Manager, Media Editors, etc.
    b. **Description**: Enter a full description of the role and its purpose.
    c. **Role Group**: Use the drop-down menu to select the Role Group this role belongs to, if any.
    d. **Public Role**: Leave this box blank. Do not use this option.
    e. **Auto Assignment**: Check this box if users are automatically assigned to this group.
    f. **Security Mode**: Use the drop-down menu to select the Security Mode for this role.
    g. **Status**: Use the drop-down menu to select the status of this role.
3. Click **Update** to save all changes.

***Note:** Advanced Settings should **NOT** be used.

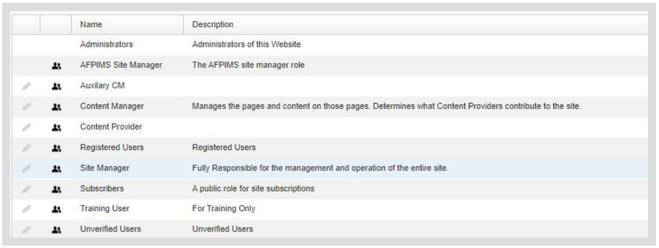


Add Role

Edit Role

To edit a **Role**:

1. Click on the **pencil** icon to the left of the role name.
2. Make the necessary changes to the role information.
3. Select **Update** to save all changes.

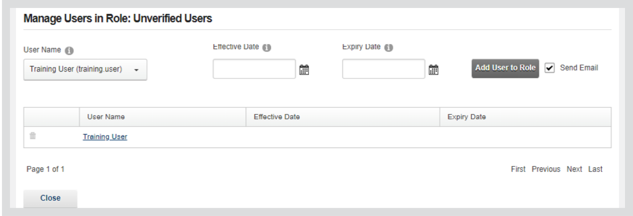


Edit Role

Manage Users

To add or remove **Users**:

1. Click on the **Manage Users**  icon to the left of the role name.
    a. **User Name**: Select the User from the User Name drop-down.
    b. **Effective Date**: Select the date this user can first access this role or leave blank for immediate access.
    c. **Expiry Date**: Select the date that access to this role will expire or leave blank for no expiry.
    d. **Send Email**: Check this box if you would like an automated email sent to this user.
2. Click **Add User to Role**.
3. Select the **trashcan** icon next to any users that you would like to remove from this role.
4. Click **Close** to exit.



Manage Users

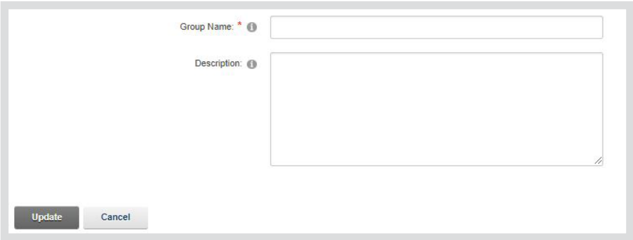
Add New Role Group

Role Groups are used to organize multiple roles, but do not have permissions set to them. They are also not required for allowing users access to the site. Think of Role Groups as a folder that holds similar roles.

Add New Role Group Button

To add a new **Role Group**:

1. Click on the **Add New Role Group** button.
2. Complete the following sections:
    a. **Group Name**: This is the name of the Role Group as you would like to see it in the Roles Group drop-down menu.
    b. **Description**: Enter a full description of the group and its purpose.
3. Click **Update** to save all changes.



Add Role Group