What are roles? How do I use them?

A role is simply a template of user rights. To learn more about user rights, refer to FAQ: USER RIGHTS.

You may name and define project-level user roles (e.g. Data Entry, Principal Investigator, Statistician), then assign users to the appropriate role. This feature allows you to quickly and consistently designate user privileges by their specific role in the project.

This FAQ will explain how to assign and manage roles on your project. This includes how to: (1.) create a role, (2.) add a user to a role, and (3.) change a user role.

To create a new role:

1. Enter a title for the role under ‘Create new roles’, then click ‘Create role.’

```plaintext
Create new roles: Add new user roles to which users may be assigned.
Research Assistant Create role
(e.g., Project Manager, Data Entry Person)
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2. Configure the rights associated with the role. Once finished, click ‘Create Role’ at the bottom right corner of the window.

To add a user to a role:

1. Enter the user’s name or username into the “Assign new user” text box, click ‘Assign to role’ and select the role to which the user should be assigned.

To change a user role:

1. You can change a user’s role by clicking on the user’s name, then clicking Assign to role and then selecting the new role.