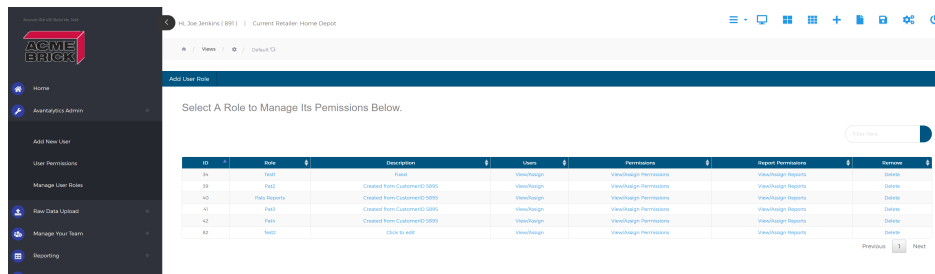


# Managing User Roles

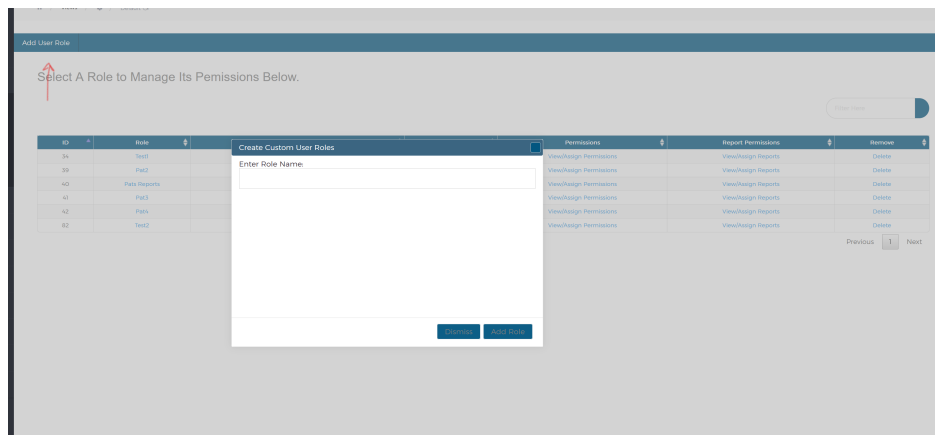
## Overview

User roles are a central part of managing permissions within the system for groups of homogenous users. If you have a number of users or are adding and removing users often, setting up roles which retain the desired permissions can be a big time-saver in the system. Read on below to understand how to utilize these best. To access the user roles features, you must have permissions to Avantalytics Admin and "Manage User Roles" option in the menu shown below on the left.



## Adding User Roles

Adding a user role can be done where the role is defined from scratch, with not permissions initially. To do this locate the "Add User Role" option in the blue toolbar across the top and click on it. You'll be asked to provide a role name. Once you've done so, the role will be available in the list of user roles.



## Adding A Role Based on an Existing User

Sometimes it can be a quick time saver to create a role where the initial permissions match that of an existing user. This allows you to start with a number of permissions and then you can customize the role permissions without having to manually assign each and every permission from scratch. To do this, you need to have access to "User Permissions" – click on the user you wish use as the model then see the toolbar option below called "Create Role From User" – this will take care of creating and assigning initial permissions. You can then customize the role through the normal role management screens

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## Learn About Popular Use Cases

- [How to Create an Insight Panel View Using Custom Regions](#)

## Related Links

- [Learning Views](#)
- [Sharing Views](#)

Change PasswordExport PasswordEmail Password ResetLock/Unlock UserDelete UserMerge To UserCreate Role From UserCopy User PrivilegesDistribute PrivilegeGenerate Mail ListFind Users Having PermissionRevoke PrivilegesAdd User RoleAssign Territory

User Permissions Listing

Below is a listing of applicable users. To manage a user's permissions, click on their name and a list of available permissions will be presented with the ability to add/remove each permission for the given user.

Filter Users

Filter Users

Account ID	User Name	Last Login	Last App Login	Device	Version	ID	Group	Permission Name	Allow/Denied?
430	7004 Bryan Hartman (b30bryan@seaworthytics.com)	04/07/22 01:46:08 PM	04/07/22 03:05:00 AM	iPhone/i2	3.88	1	Admin	ABC Truck Monitoring	<div>Yes</div>
430	7005 Bryan Hartman (b30bryan@seaworthytics.com)	04/03/22 08:09:21 AM	04/03/22 12:00:00 AM	Android - Pixel 4	3.85	2	Analytics/Mobility	Analytics/Mobility	<div>No</div>
430	7006 Bryan Hartman (b30bryan@seaworthytics.com)	03/30/22 04:29:06 PM	03/30/22 12:00:00 AM	Android - Pixel 4	3.85	3	Weather Integration	Weather Monitoring	<div>No</div>
430	7007 Bryan Hartman (b30bryan@seaworthytics.com)	02/14/22 02:37:35 PM	02/14/22 12:00:00 AM	iPhone/i2	3.84	4	Main	Account Settings	<div>No</div>
430	7008 Bryan Hartman (b30bryan@seaworthytics.com)	03/26/22 09:56:16 AM	03/26/22 12:00:00 AM	iPhone/i2	3.85	5	Admin	Manage Current Jobs	<div>Yes</div>
430	7010 Bryan Hartman (b30bryan@seaworthytics.com)	04/07/22 11:30:40 AM	04/07/22 12:00:00 AM	Android - Pixel 4	3.85	6	Admin	Add New Price Sheet Job	<div>Yes</div>

Interacting & Updating User Roles

The table shown below has a number of links which allow you to interact with roles – assigning roles to one or more user, adding or removing permissions and report access, editing the descriptive for the role or even deleting the role. As you make changes to permissions – any user assigned this role will receive the updated permissions. If you are removing permissions, a user will lose that permission if the role providing it was the only way it gained permission. It should be noted that users can be assigned multiple roles which may have overlapping permissions. In these cases, removing the permission from one role will not remove the permission from a user if another role they remain assigned to also lists that permission.

**Tip:** right clicking on the role ID on the left provides access to all functions to modify user roles directly.

Add User Role

Select A Role to Manage Its Permissions Below.

Filter Users

ID	Role	Description	Users	Permissions	Report Permissions	Remove
35	Test	Test	View/Assign	View/Assign Permissions	View/Assign Reports	Delete
	Assign Permissions	Created from CustomerID 5885	View/Assign	View/Assign Permissions	View/Assign Reports	Delete
	Edit Role Description	Created from CustomerID 5885	View/Assign	View/Assign Permissions	View/Assign Reports	Delete
	Assign Users	Created from CustomerID 5885	View/Assign	View/Assign Permissions	View/Assign Reports	Delete
	Edit Reports	Created from CustomerID 5885	View/Assign	View/Assign Permissions	View/Assign Reports	Delete
	Delete Role	Click to edit	View/Assign	View/Assign Permissions	View/Assign Reports	Delete
	Copy This Role					

Previous1Next

Adding / Removing Assigned Users

To add or remove a user - click on the "View Assign" link for the Users column on the user role you wish to change – you'll see a pop-up list of the users in the account currently. Check the box (or uncheck to remove) to assign the role to the user. Once this is done, the user will gain all the permissions of the role. Furthermore as you make changes to the role in the future, those permissions changes will propagate to users assigned to the role.

Select A Role to Manage Its Pemiissions Below.

ID	Role	Description	Users	Permissions
34	Test1	Fixed	View/Assign	View/Assign Permissions
39	Pat2	Created from CustomerID 5895	View/Assign	View/Assign Permissions
40	Pats Reports			View/Assign Permissions
41	Pat3			View/Assign Permissions
42	Pat4			View/Assign Permissions
82	Test2			View/Assign Permissions

User Info

CustomerID	Name	Assigned(?)
7005	Bryan Hartman	<input type="checkbox"/> Assigned?
7008	Bryan Hartman	<input type="checkbox"/> Assigned?
7004	Bryan Hartman	<input type="checkbox"/> Assigned?
7007	Bryan Hartman	<input type="checkbox"/> Assigned?
7006	Bryan Hartman	<input type="checkbox"/> Assigned?
7010	Bryan Hartman	<input type="checkbox"/> Assigned?

Dismiss