User Roles

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A **user role** defines permissions for users to perform a group of activities.

To create a new User Role

NOTE: Basic and Lite Roles are only available if your subscription is based on Full/Basic/Lite user model. See Licensing

To create a Lite/Basic user role:

1. Open the tenant administration page more
2. In the Left Navigation Area, select **Security**. The Security expands to display list.
3. Select **User Roles**. The existing User Roles display.
4. Click on **+ NEW**, choose on of: **Full Role, Lite Role,** or **Basic Role** from menu pending on the need. On the form:
    1. Type the name for the user role in the **Name** field.
    2. Type the description for the user role in the **Description** field.
    3. In **Applications** field select Pencil icon. The Select dialogue appears. In Select Application dialogue, select the application you want and click OK button to confirm the selection.
    4. For **Record Access** tab, create access for the role. Please refer to Record Access for more information.
    5. For **Navigation Access** tab, pick the desired navigation items.
5. Click **Save** to save changes on form.

Alternatively, new user role can be created from Security roles tab of the User Accounts form.

Assigning an existing user account to a user role

To assign an existing user account to a user role:

1. On User Role form, select the **Users** tab.
2. Select the Link to Existing icon. The Select User Account dialogue appears.
3. Quicksearch for the user account you want.
4. Select **OK** to confirm.

If the user account is not yet created, please refer to the User Accounts page to create it beforehand.

Alternatively, it can be created by selecting **+NEW** on **Users** tab (see step 1)