There are three pre-populated **Roles**: Module Administrator, Read-only, and Reporter.

Add additional Roles.

This drop-down allows you to add user assignments as well as add reporting tags.

Checking the box allows you to copy or delete the Role.

Opening a user's **User Assignment**, allows you to remove an assignment or transfer the assignment to someone else.

Filter or sort each column, as desired.

In both **Roles** and **User Assignments**, selecting the link opens the function.

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Edit role

*Name

Module administrator

Description

Module administrator - Provides access to all administration features

> Depending on the role, each tab may require some or all of these functions enabled.

MODULE   EVENTS   ROLES/USERS   TEMPLATES   PROJECT SETTINGS   HISTORY

☑ Edit module summary   ☑ Create and edit categories   ☑ Create and edit statuses

☑ Edit email templates   ☑ Manage module organization exclusions   ☑ Create and edit classifications

☑ Create notifications   ☑ Create and edit types

☐ Make this role read only ⓘ

Edit role

*Name

Module administrator

Description

Module administrator - Provides access to all administration features

MODULE   EVENTS   ROLES/USERS   TEMPLATES   PROJECT SETTINGS   HI

☑ Enable/ Disable Project Structure   ☑ Manage Project Inspection and Test Plans   ☑ Manage Project User Groups

☑ Edit header template   ☑ Create and edit Inspection and Test Plans   ☑ Create and edit User groups

☑ Edit header template

> Turns on / off the Project Structure toggle.

> Ability to accesses and manage project structure header template.

> Allows users to create ITPs on the project.

> Turns on / off the ITP for the project.

> Ability to accesses and manage ITP header template.

> Turns on / off User Groups for the project.

> Allows users to create / edit User Groups on the project.

☐ Make this role read only ⓘ

Cancel   Save

USER ASSIGNMENTS
MODULE SETTINGS

SQC

● ADD USER ASSIGNMENTS

1. Within a project, and from the User Assignments tab, click the ⊕ icon, and select **Add user assignment**.
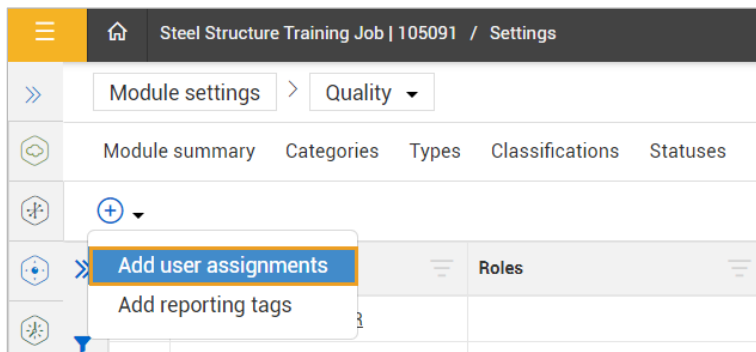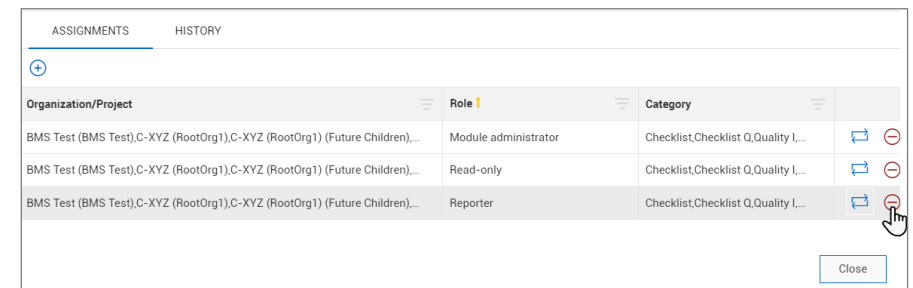

2. Search for and select the user(s), then click **Next**.
3. Select the organizations/projects, then click **Next**.
4. Select the categories, then click **Next**.
5. Select the roles, then click **Done**.

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● REMOVE USER ASSIGNMENTS

1. Within a project, and from the User Assignments tab, click to open a user's Name.
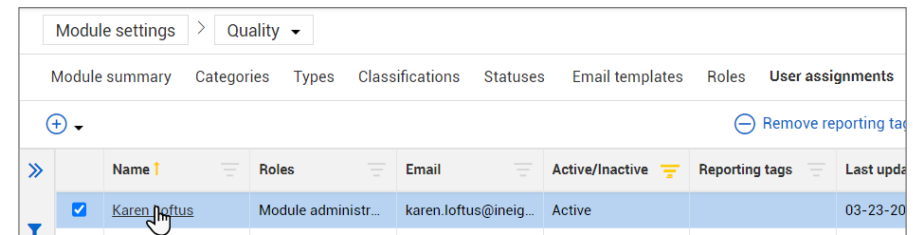
2. On the Assignments tab, select the **Remove Assignment** icon for the desired user's role.

3. Select the organizations/project to be removed, then click **Next**.
4. Select the categories to be removed, then click **Done**.

TIP: When an individual no longer needs an assignment use the **Transfer Assignment** function to transfer the assignment to another individual.