

The screenshot displays the 'Roles' and 'User assignments' sections of the SQC system. The 'Roles' section on the left lists various roles with checkboxes for selection. The 'User assignments' section on the right shows a table of users and their assigned roles. Callouts provide detailed instructions on how to use these features.

**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.**

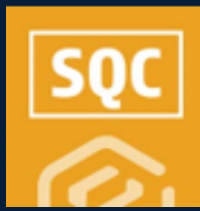
**In both **Roles** and **User Assignments**, selecting the link opens the function.**

Name	Roles	Email	Active/inactive	Reporting tags	Last updated on	Last updated by
Karen Loftus	3rd Party Claims Manager, Compliance mo...	karen.loftus@ineight.com	Active	Confidential, HR	01-13-2021	Karen Loftus

# QUICK GUIDE

# EDIT ROLES

## MODULE & EVENTS SETTINGS



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

Module administrator - Provides access to all administration features

MODULE ROLES/USERS TEMPLATES PROJECT SETTINGS HISTORY

- ☒ Edit module summary
- ☒ Edit email templates
- ☒ Create notifications
- ☒ Create and edit categories
- ☒ Manage module organization exclusions
- ☒ Create and edit types
- ☒ Create and edit statuses
- ☒ Create and edit classifications

MODULE EVENTS ROLES/USERS TEMPLATES PROJECT SETTINGS HISTORY

- ☒ Edit completed events/tasks ⓘ
- ☒ Edit event/task properties ⓘ
  - ☒ Edit event/task proj/org
  - ☒ Edit event/task category
  - ☒ Edit event/due date
  - ☒ Edit event/task status
  - ☒ Edit event/task Reporter/Responsible party
  - ☒ Edit event/task title
- ☒ Delete events/tasks
- ☒ Copy events/tasks from event/task list
- ☒ View deleted categories in the event/task list
- ☒ Check in events/tasks ⓘ
- ☒ Checkout events/tasks

☐ Only provide access to own forms/tasks on the event/task list

Categories

Enable check-in and check-out permissions to allow pushing events and tasks to users from all events or tasks screens, as well as check-in locked events and tasks so they can be accessed or assigned to other users.

# QUICK GUIDE

# EDIT ROLES

## PROJECT SETTINGS



Turns on / off the Project Structure toggle.

Ability to accesses and manage project structure header template.

Turns on / off the ITP for the project.

Turns on / off User Groups for the project.

Allows users to create ITPs on the project.

Ability to accesses and manage ITP header template.

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

Module administrator

Module administrator - Provides access to all administration features

MODULE EVENTS ROLES/USERS TEMPLATES PROJECT SETTINGS HIS

☒ Enable/ Disable Project Structure

☒ Edit header template

☒ Manage Project Inspection and Test Plans

☒ Create and edit Inspection and Test Plans

☒ Edit header template

☒ Manage Project User Groups

☒ Create and edit User groups

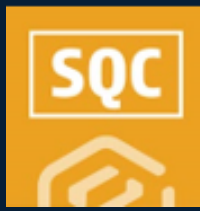
☐ Make this role read only ⓘ

Cancel Save


# QUICK GUIDE

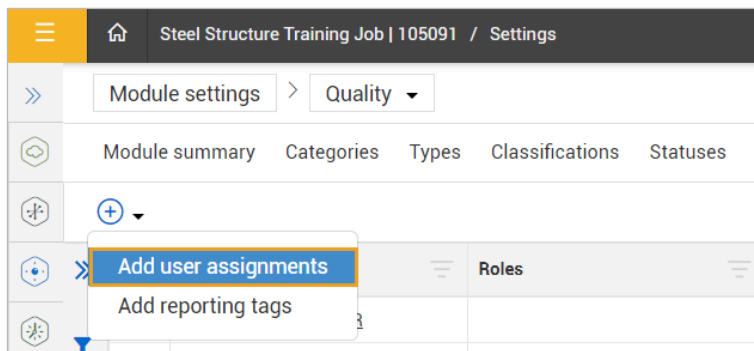
# USER ASSIGNMENTS

## MODULE SETTINGS



### 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**.

### NEED SOME MORE HELP?



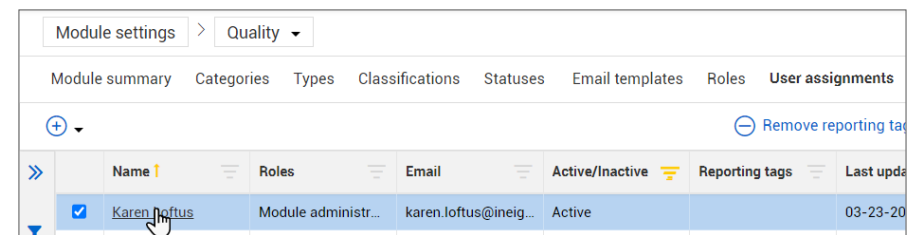
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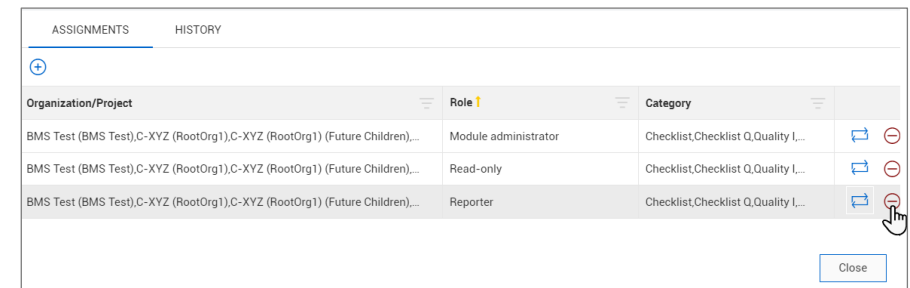
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### REMOVE USER ASSIGNMENTS

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.

Checklist, Checklist Q, Quality I, ...



Transfer assignment