

# Assigning roles

You can assign a pre-existing or a custom role to a user, and create a new custom role and assign it to a user simultaneously. You cannot assign resources to a user who does not have a role. This section shows you how to:

- Assign a new role to a user.
- Assign a role to a new or existing user.
- Assign a role to a user group (all users in the user group will accept the same role).

**Tip**

You can use the **Role Assignments** section in either the **Role detail** or **User detail** page to assign a role to a user.

To create a new role and assign it to a user at the same time

- + Create new role
1. On the **Role Management** page, click **+ Create new role** to open the **Create a new role** page.
  2. Type the name of the role (required) and its description (optional).
  3. Assign permissions by selecting their respective check boxes.
  4. In the **Role Assignments** section, click **+ Add** to add a user to the new role.
  5. In the **Add Users** dialog, select one or more users and click **Add**. The selected user(s) will be added to the **Role Assignments** section.

**Tip**

To assign a role to multiple users in the **Add Users** dialog, you can press the key **Ctrl** on your keyboard and select the usernames.

Create

Role Assignments

+ Add

Matrix Criteria

All Resources

All

Swap

Search

Clear

Username/Group ^	Scope	Book		
		DH190	generic table	TestAttachImage1
		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Internal User				
Administrator	<input checked="" type="checkbox"/> <input checked="" type="radio"/> Global <input checked="" type="radio"/> Custom	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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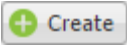
Column Paging: Display 20 project column(s) per page


- Create
6. Click **Create**. The new role will appear on the **Role Management** page.

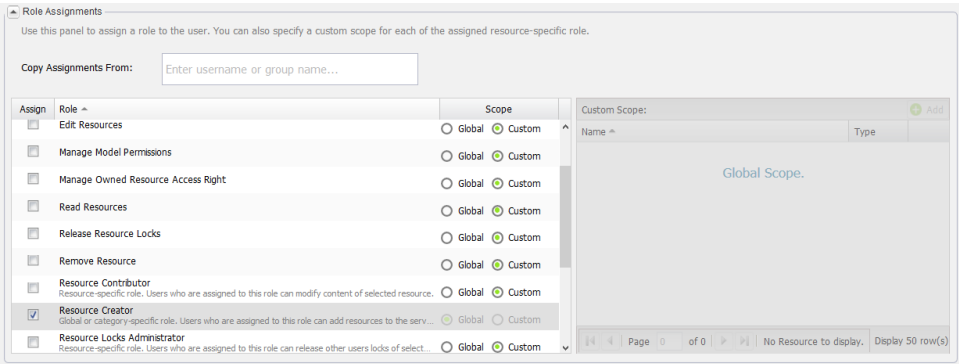
To assign a role to an existing user

1. On the **User Management** page, click a username to whom you want to assign a role. The **User detail** page will open.
2. Go to the **User Assignments** section, and select the check box(es) to assign one or more roles to the user.
3. Click **Save**.

To assign a role while creating a new user

1. On the **User Management** page, click  to open the **User detail** page.
2. Type the username and other information.
3. Go to the **Role Assignments** section and select the check box(es) of the role(s) that you want to assign to the user (see the following figure).

 **Note**  
You do not need to assign a resource to a global role because its permissions extend across all resources (see [Scopes of roles](#)).




Role Assignments

Use this panel to assign a role to the user. You can also specify a custom scope for each of the assigned resource-specific role.

Copy Assignments From:


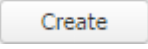
Assign	Role	Scope
<input type="checkbox"/>	Edit Resources	<input type="radio"/> Global <input checked="" type="radio"/> Custom
<input type="checkbox"/>	Manage Model Permissions	<input type="radio"/> Global <input checked="" type="radio"/> Custom
<input type="checkbox"/>	Manage Owned Resource Access Right	<input type="radio"/> Global <input checked="" type="radio"/> Custom
<input type="checkbox"/>	Read Resources	<input type="radio"/> Global <input checked="" type="radio"/> Custom
<input type="checkbox"/>	Release Resource Locks	<input type="radio"/> Global <input checked="" type="radio"/> Custom
<input type="checkbox"/>	Remove Resource	<input type="radio"/> Global <input checked="" type="radio"/> Custom
<input type="checkbox"/>	Resource Contributor Resource-specific role. Users who are assigned to this role can modify content of selected resource.	<input type="radio"/> Global <input checked="" type="radio"/> Custom
<input checked="" type="checkbox"/>	Resource Creator Global or category-specific role. Users who are assigned to this role can add resources to the serv...	<input checked="" type="radio"/> Global <input type="radio"/> Custom
<input type="checkbox"/>	Resource Locks Administrator Resource-specific role. Users who are assigned to this role can release other users locks of select...	<input type="radio"/> Global <input checked="" type="radio"/> Custom


Custom Scope: 

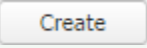

Name  Type

Global Scope.


Page 0 of 0 | No Resource to display. | Display 50 row(s)

4. You can click  to assign one or more resources to each role. See [Assigning resources](#) for more information.
5. Click . The new username will be created and the selected roles will be assigned to the user.

 **Tips**

- Once you have created a new user and selected a role for the user, before clicking  to save the changes, you may click  in the **Role Assignments** section to assign resources to a user role.
- You can only assign a resource to a resource-specific role. The scope of the role is **Custom** by default.
- For more information about assigning resources to a role, see section [Assigning resources](#).

To assign a role to a user group

1. On the **User Management** page, click a user group. The **User Group detail** page will open.
2. Go to the **User Assignments** section, and select the check box(es) to assign one or more roles to every member in the user group.
3. Click .