

Customizing a role

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Edit role details

When you view role details in the **Role** pane, you can edit the details of a custom role in the **Role details** card. This is accomplished by one of the following methods:

- In the **Role details** card, click **Edit** to edit details.
- Click  next to the role name and select to **Edit role details**.

Add or remove permissions

You can add or remove [permissions](#) from a role you create (custom role) on the **Role** pane. A role needs to have at least one permission.

To add or remove permissions from a role

1. On the **Roles** application do one of the following:
 - Click the role to open the **Role** pane. In the **Permissions** card, click the **Change** button.
 - Click  and select to **Change permissions**.
2. Select the checkbox of the permission you want to add, or clear it to remove the permission from the role.
3. Click the **Save** button to save the changes.

Assign a role

You can assign a global or a custom role to a user/group, as well as create a new custom role and assign it simultaneously. You cannot assign resources to a user/group who does not have a role.



Tip

You can use the **Role Assignments** section in either the **Resource** application or **User** application to assign a role to a user/group. [Click here to learn more on how to assign a resource to a role.](#)

To assign a role to a user/group

1. In the **Roles** application, click the role you want to assign. The **Role** pane opens.
2. In the **Role Assignments** card, click the **Change** button.
3. Select to **Add user/group**. In the **Add users/groups** search bar enter a name. From the list that opens, select a user/group.
4. The selected user/group will be added to the **Role assignments** card.
5. Click the **Save** button to save the changes.

Remove a user/group from a role

You can remove a user/group from a role in the **Roles** application. When you remove a user/group from a role, you take away the permissions associated with the role, which will cause any resources assigned to the role be removed as well. When you remove a user group from a role on the **Users** application, you cancel the role assigned to all users in the group.

To remove a user/group from a role

1. On the **Roles** application, do one of the following:
 - Click a role, the **Role** pane will open. In the **Role assignments** card click the **Change** button.
 - Click  and select to **Change role assignments**.
2. The **Change role assignments** pane will open. Click the **Remove** button to remove the user/group from the role. The selected user will be removed from the list.
3. Click the **Save** button to save the changes.

Related pages

- Assigning resources to a role