Introduction

This document is a step-by-step guide to set up Roles to manage permissions within Unify Records for various users.

What are Roles?

Roles are used to grant users permissions within Unify Records. By default, three roles are provided when a customer is onboarded to Unify Records. They are:

- **Tier 1 Customer Admin** – grants all permissions to all features and functions. This role cannot be edited.
- **Reviewer** – grants Inventory management, viewing, uploading, downloading, and a few settings permissions. This role is editable.
- **Read Only** – grants viewing permissions. This role is editable.

NOTE: There are a few permissions which are always enabled for users and, at this time, cannot be removed.

Prerequisites

Before using Roles, confirm that you have access to the relevant Settings and permission to manage Roles. Available actions may vary depending on your role.

Before you begin

Screenshots provided in this set up guide may appear different than your Unify Records screens, either due to different permissions, field configurations, or browser settings.

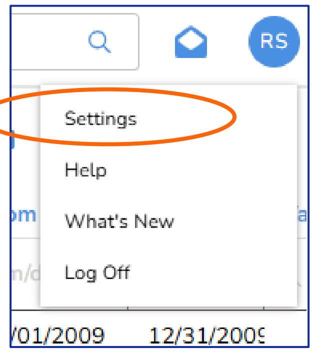
Creating and assigning Groups

This section will walk through creating groups and assigning those groups to users.

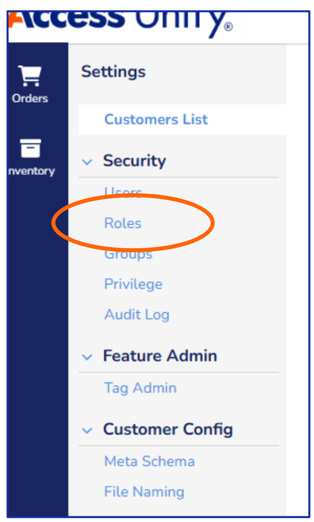
Actions – creating a group

Action Log into Unify, if not already logged in

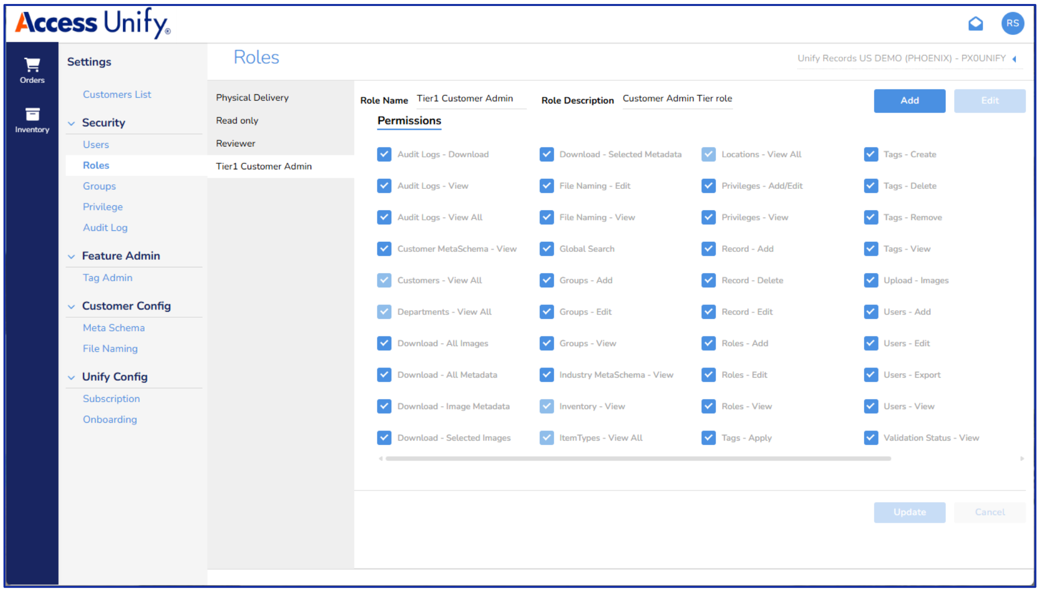
Action Navigate to the User Menu by clicking on your initials, and click on 'Settings'



Action Click Roles in the side panel.

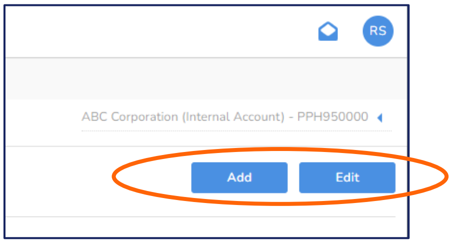


Orientation The Roles page will be presented with the existing roles listed in the left panel and the details of the selected role in the content area on the right.



Action

To add a new role, click ‘Add’ toward the top right of the screen. Otherwise, select the role you want to edit and click ‘Edit’ towards the top right of the screen.



Action

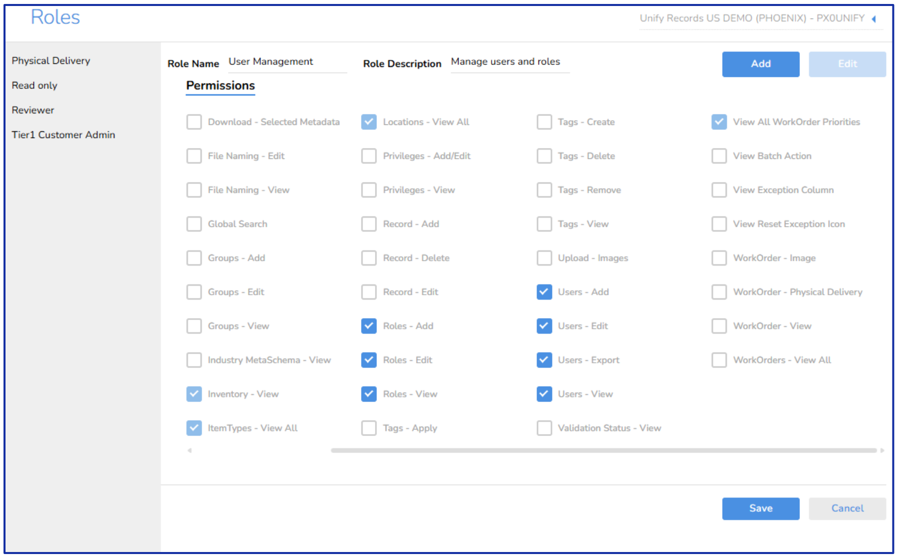
Enter a ‘Role Name’ and ‘Description’ for the role you want to create or edit.

SUGGESTION: Name the role something that is clear and understandable for users.

Action

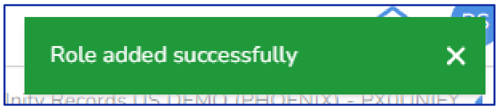
Select one or more permissions that will be granted in this role.

NOTE: Best practice is to keep the roles organized broadly based on what an end-user might be doing each day and segregation of duties. Getting too granular, such as creating a role for every permission, may eventually be too difficult to manage.



Action On the bottom right of the screen, click 'Save' or 'Update'.

Action Verify you received a 'Role added successfully' or 'Role updated successfully' message and that the newly created role is in the list of existing roles.



INFORMATION: This new role can now be assigned to users.

SUCCESS! You have successfully learned about Roles.