Assigning roles and permissions

Only a Site Admin can give permissions and assign roles to users. The Site Admin role was assigned to the person who initially set up the organization's account. As Site Admin, you may have assigned that role to others in the organization as well. The Site Admin is able to perform all duties on the organization's account. There are many other roles, however, and each of them defines the activities a user can perform. Site Admins are the only individuals who can assign roles to users. Every person who volunteers for your organization should hold the role of **Volunteer**. Beyond that, you can decide what duties they will perform, and assign the appropriate role.

Before you can assign a role and permissions to a user, however, the user must have a user login account with RescueGroups.org and be a Contact for your organization. If they're not, you can add them to your contact list and create a user login account for them.
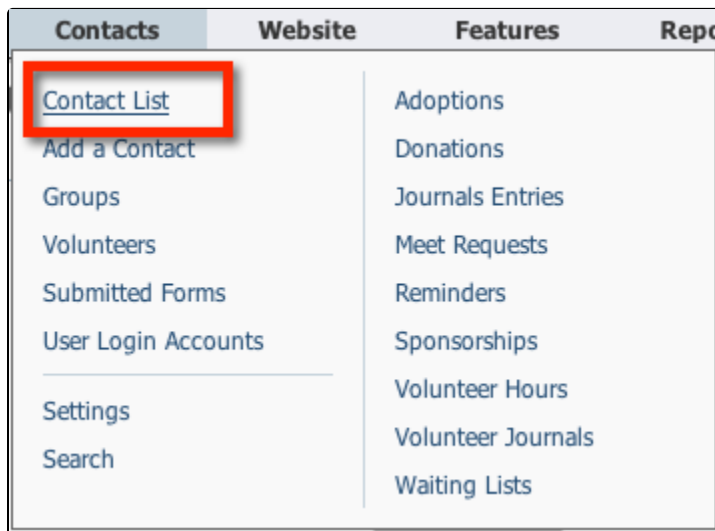

On this page:

- Checking to see if your volunteer has a user login account
- Adding a User Login Account for a contact
- Assigning Roles to a Contact

Checking to see if your volunteer has a user login account

Follow these instructions to see if your volunteer has an account already:

1. Go to the **Contacts > Contacts List.**

2. Using one of the **Search** icons, find the volunteer in your list of contacts.

3. Click the volunteer's name to view the **Contact** page for that volunteer.

4. At the top of that **Contact** page, click **User Login Accounts** to find the **User Login Accounts** for that volunteer.

   (i) **NOTE:**

   Most people, especially new volunteers, will have a 0 in parenthesis next to the link for User Login Accounts. In this case, Michelle has 5 accounts.

5. Click **User Login Accounts** to go to the User Login data table for this one contact. From that data table, you can see if they have a **User Login Account**, and if not, you can create one for them.

Adding a User Login Account for a contact

To add a **User Login Account** for your existing **Contact**, follow these instructions:

1. From the **User Login** data table (see above), click the **Add a User Login Account for this Contact** button. This opens the **User Registration** page.
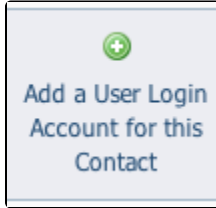
2. Verify that the contact information on the **User Registration** page is correct.

3. Fill in the required information:
   a. Assign a Username (they can change their username once they log in themselves).
   b. Select **Volunteer** for the registration type.
4. Click **Register User.** They will receive an email with the username you designated for them and a temporary password.
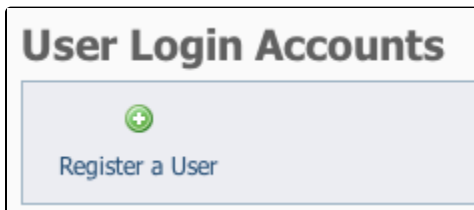
> ⚠ **NOTE:**
>
> Registering a new user also adds them as a **Contact** in your organization.

Assigning Roles to a Contact

Whether you have created a **User Login Account** for a volunteer, or your volunteer is already a contact, you are ready to proceed to the next step: assigning roles. To assign roles, follow these instructions:

1. Go to **Contacts > User Login Accounts** in the **Contacts** menu.

2. Find the **User Name** for the user to whom you would like to assign a role or grant access.

Click the search icon on the right to open the search fields. Search for the user name, or contact. Then click on the username.

3. Click the **User Name**.

**4.** Click **Roles** from the user's data table. If the user has no roles assigned as yet, there will be a 0 in parenthesis after the word Roles. The number in parenthesis denotes the number of assigned roles within your organization. You can always come back at any time to verify the roles a user is assigned.

5. Click **Grant a Role** to the user to add permissions and roles to this volunteer's account.

Grant a Role to
this User
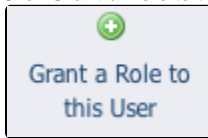
Popular Questions
Topics:

- roles
- permissions

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