

How to Add, Edit, or Remove User Roles

Note *To perform these steps, your Windows user name must be assigned to the Administrator role or to a custom role with User Management privileges assigned.*

The application provides several default (predefined) roles. You cannot edit or delete default roles. You can, however, add, edit, or delete custom roles.

1. Click **Preferences > User** Accounts to open the Manage User Accounts window.
2. Click **Manage Roles** to open the Manage Roles window.
3. To create a new role, click **Create Role**. In the Add Role window:
 - A. Enter a **Name** and **Description** for the new role.
 - B. Select the privileges to be assigned to the role.
 - C. Click **OK** to apply the user role settings.
4. To edit a user-defined role, select the role and click **Edit Role**. In the Edit Role window:
 - A. If necessary, change the **Name** or **Description** for the role.
 - B. Select the privileges to be assigned to the role.
 - C. Click **OK** to apply the user role settings.
5. To remove a user-defined role, select the role and click **Remove Role**.
You cannot remove a role if a user is assigned to the role.
6. To view a list of users assigned to a role, click **Users in Role**.
7. When you finish, click **Close**.