

You can define as many roles as you need for your workflow.

You can either modify an existing role or create a new role. The roles are immediately available to be assigned to both customer users and staff users.

- 1. On the home page, click **Administration**.
- 2. In the **Administration** area, click **Roles**.
- 3. In the **Roles** area, perform any of the following tasks:

To	Do This
Create a new role	a. In one of the following categories; System Roles, Customer Roles, or Job Roles, click the plus button . A new Untitled Role is added to the list of roles and the role's details appear in the right pane. b. In the Role Name box, type a unique name for the role. Tip: Type a name that describes the purpose of the role—for example, Approver. c. Select the user rights that are appropriate for the role.
Rename an existing role	a. Click the old role name row. b. In the right pane, in the Role Name box, type a new name for the role.
Modify the user rights for an existing role	a. Click the old role name row. b. Select the user rights that are appropriate for the role. Clear the check boxes for any rights that are not appropriate for the role.

- 4. Click **Save**.
If you have modified an existing role, all users and user groups that had the old role are immediately updated with the new role.