

# Add a Role and set Permissions

12 Steps [View most recent version](#) 

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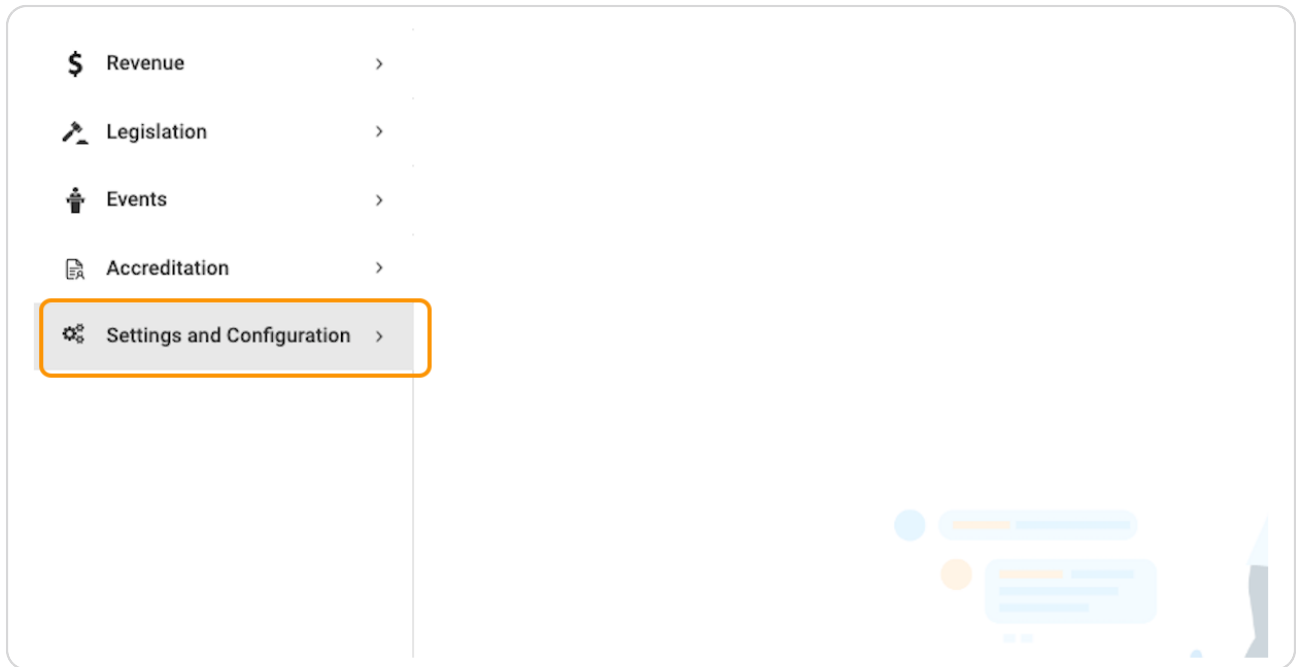
Created by  
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October 11, 2023

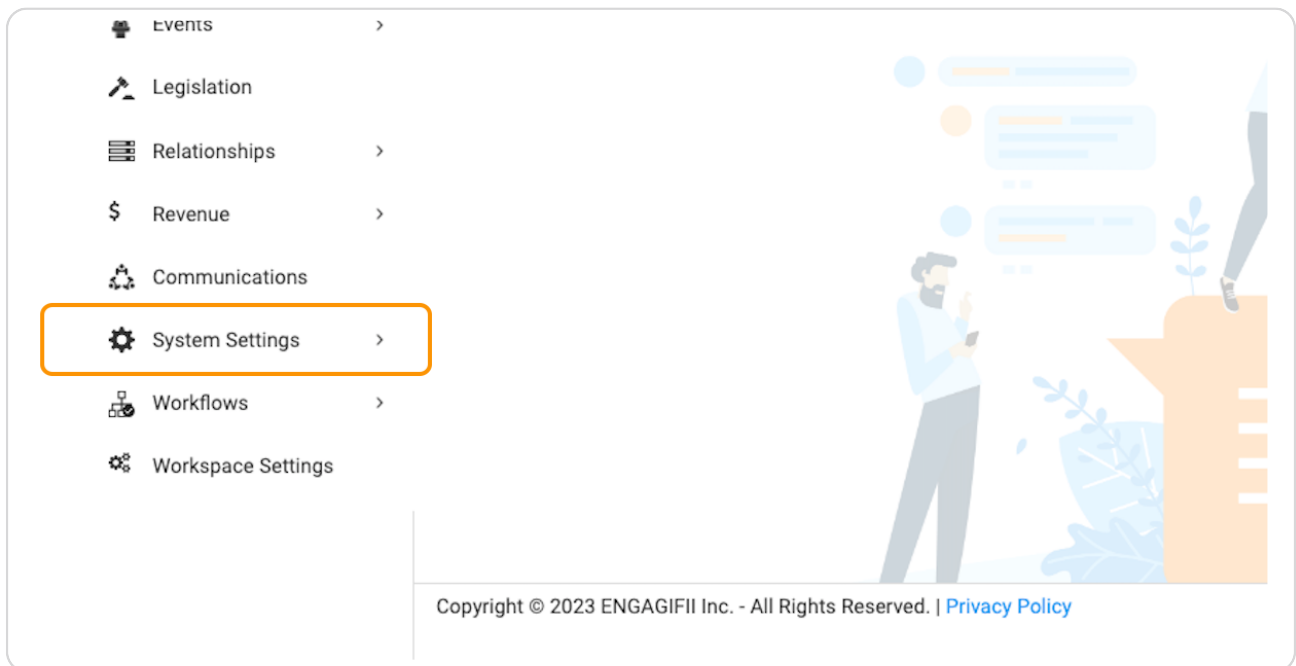
## STEP 1

### Click on Settings and Configuration



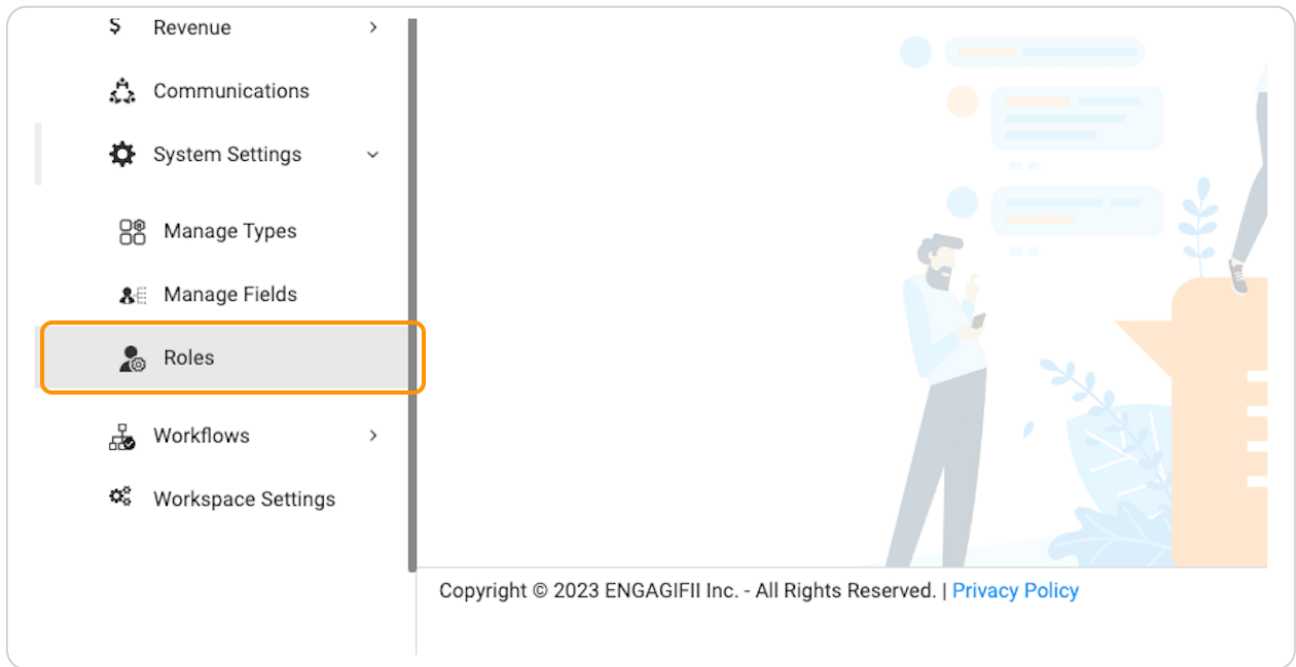
## STEP 2

### Click on System Settings



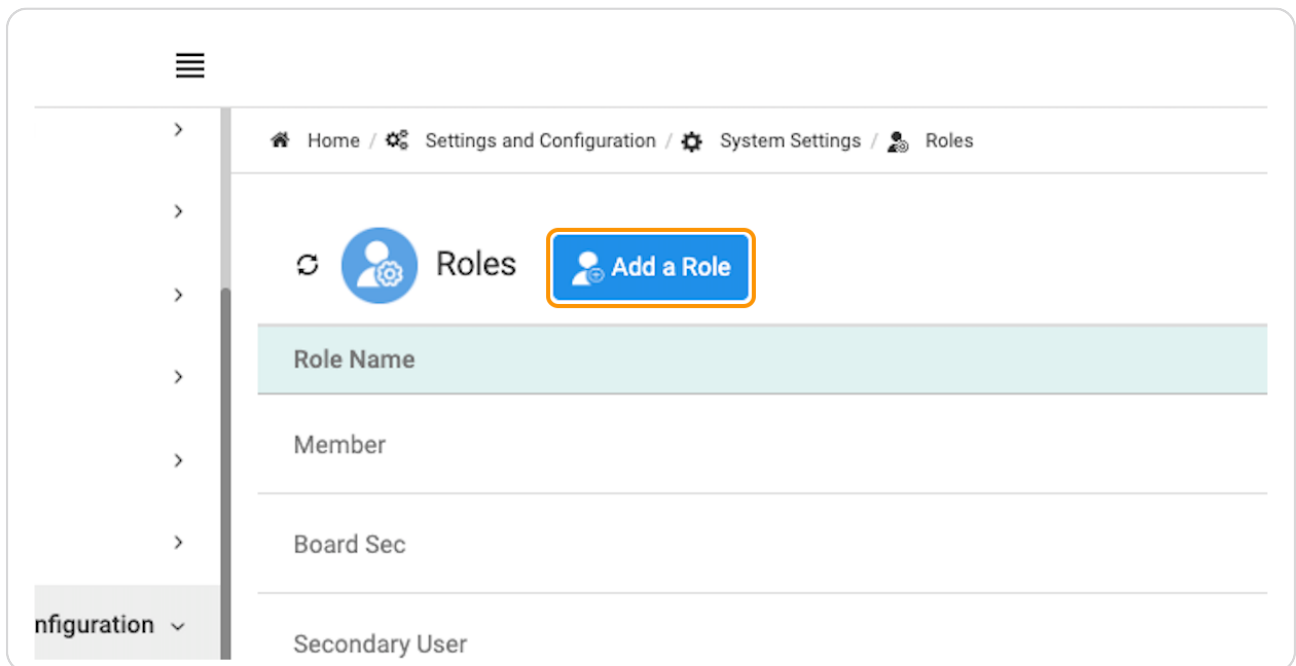
### STEP 3

#### Click on Roles



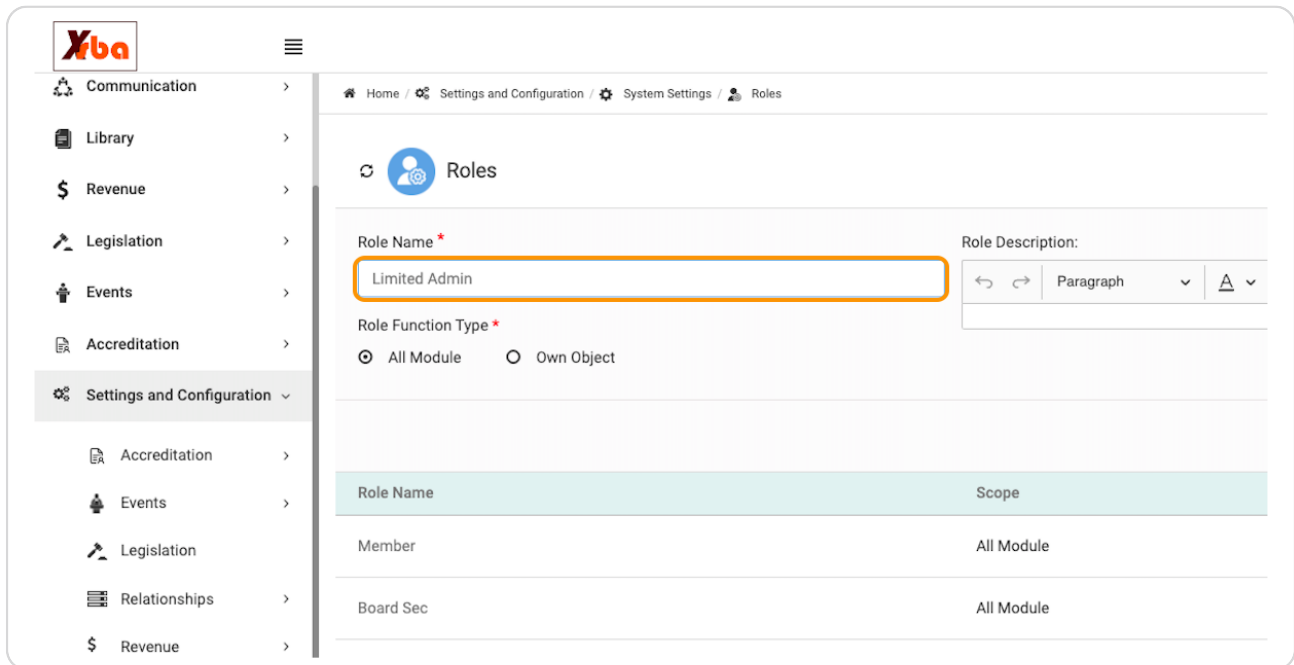
### STEP 4

#### Click on Add a Role



## STEP 5

### Add the name for the new role you are creating

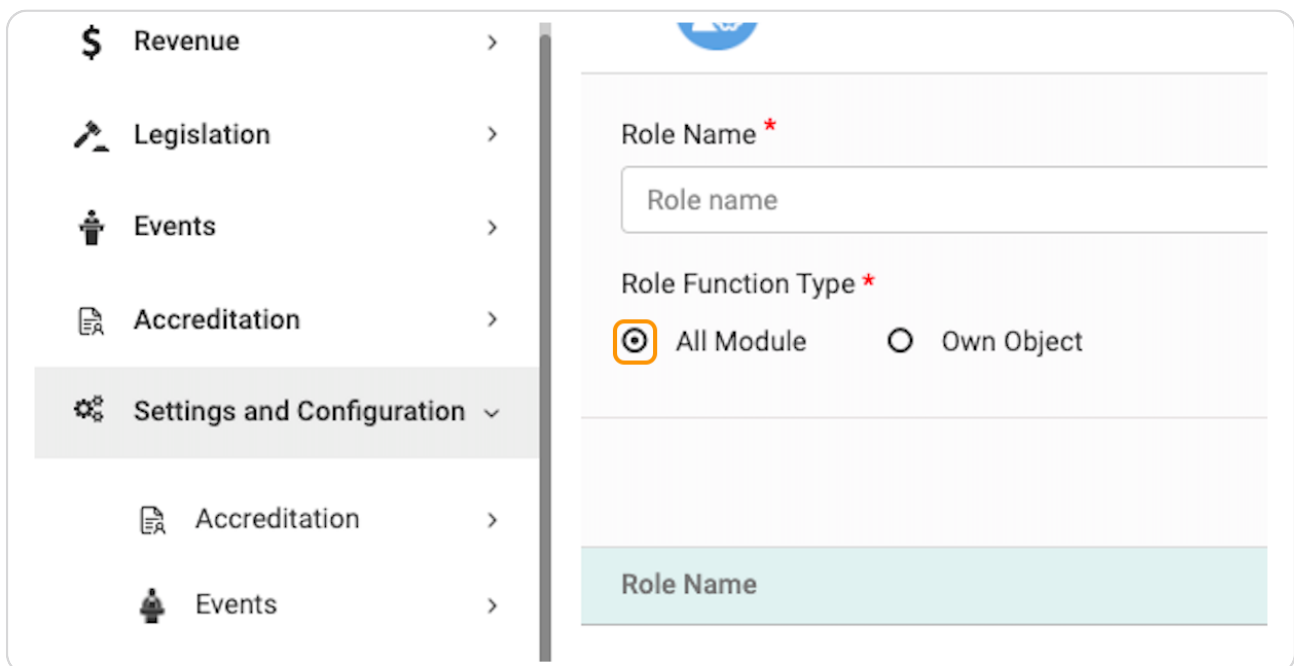


The screenshot shows the 'Roles' configuration page in the Xba system. The left sidebar contains a navigation menu with categories like Communication, Library, Revenue, Legislation, Events, Accreditation, and Settings and Configuration. The main content area is titled 'Roles' and includes a form for creating a new role. The 'Role Name' field is highlighted with an orange border and contains the text 'Limited Admin'. The 'Role Function Type' is set to 'All Module'. Below the form is a table listing existing roles.

Role Name	Scope
Member	All Module
Board Sec	All Module

## STEP 6

### Select All Module



The screenshot shows the 'Roles' configuration page in the Xba system. The left sidebar contains a navigation menu with categories like Revenue, Legislation, Events, Accreditation, and Settings and Configuration. The main content area is titled 'Roles' and includes a form for creating a new role. The 'Role Function Type' is set to 'All Module', which is highlighted with an orange border. Below the form is a table listing existing roles.

Role Name	Scope
Member	All Module
Board Sec	All Module



## STEP 7

Type a description for your new role (if needed)

Crescerance Admin ▾

✕ ▾



Role Description:

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Scope	Last Modified On	Role Type
All Module	08/03/2022	System
All Module	12/06/2022	System

## STEP 8

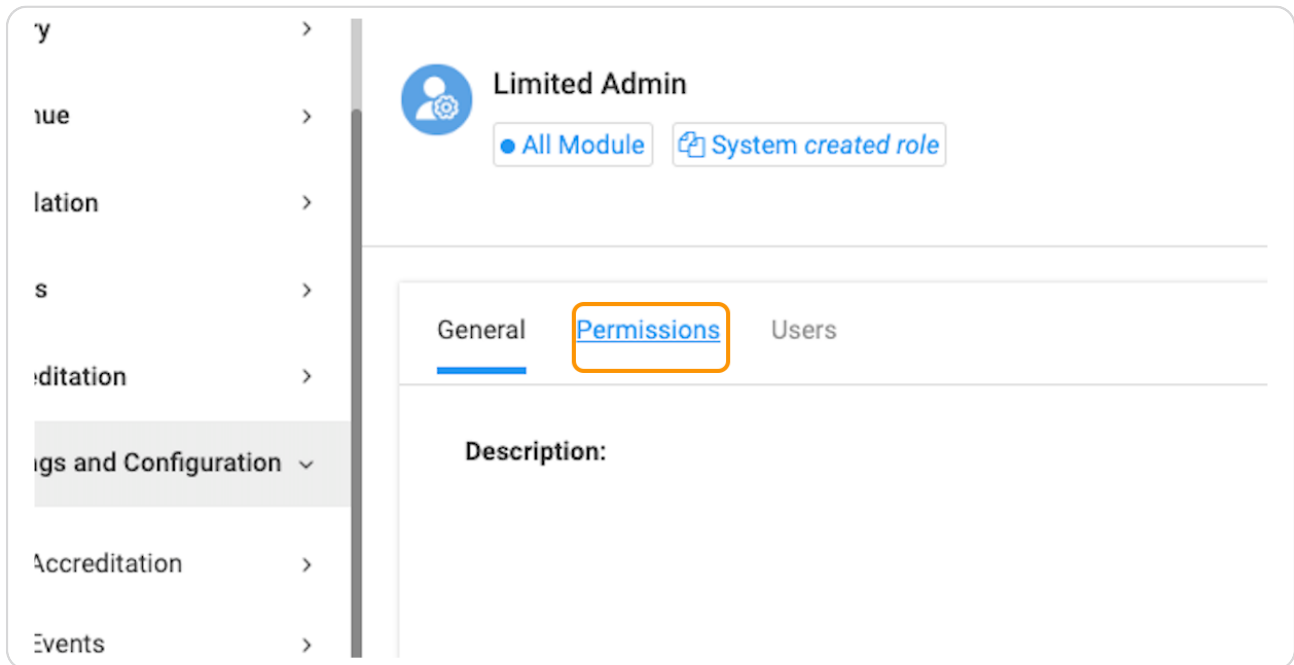
Click on Save And Open Permissions

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Last Modified On	Role Type
08/03/2022	System
12/06/2022	System

## STEP 9

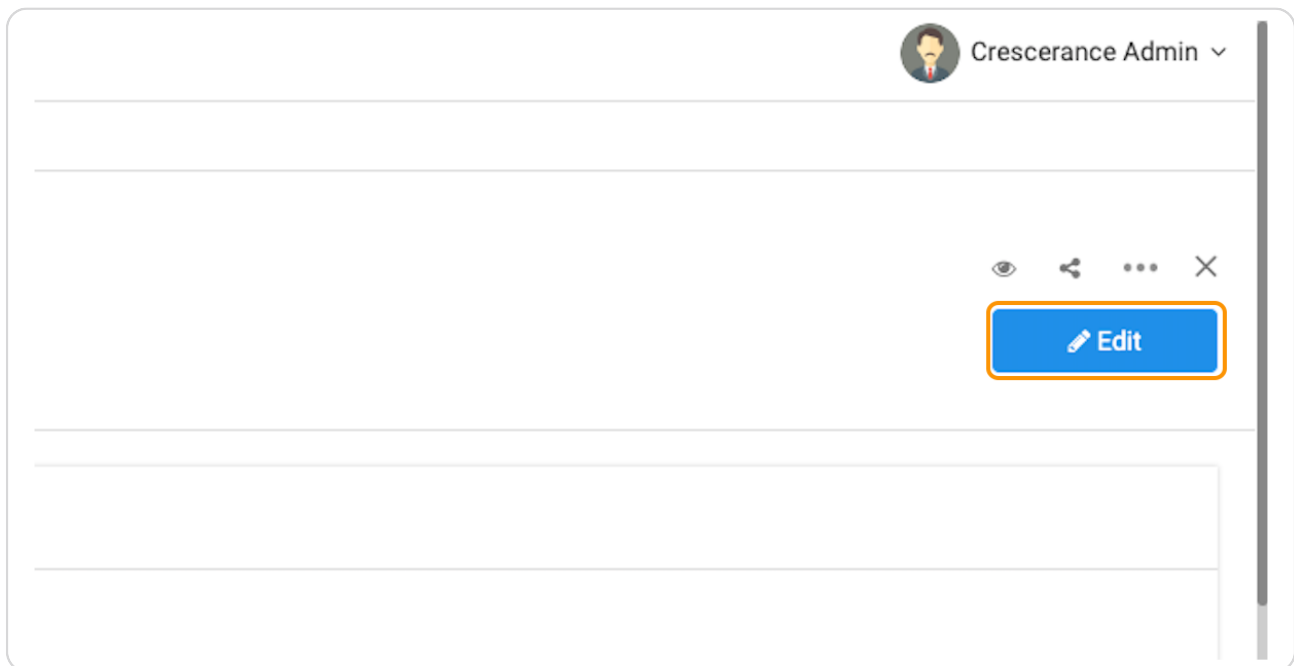
### Click on Permissions



The screenshot shows a user profile for 'Limited Admin'. The profile includes a user icon, the name 'Limited Admin', and two tags: 'All Module' and 'System created role'. Below the profile information, there are three tabs: 'General', 'Permissions', and 'Users'. The 'Permissions' tab is selected and highlighted with an orange border. Below the tabs, there is a section labeled 'Description:' which is currently empty. On the left side of the page, there is a vertical navigation menu with several items, including 'Roles and Configuration' which is highlighted.

## STEP 10

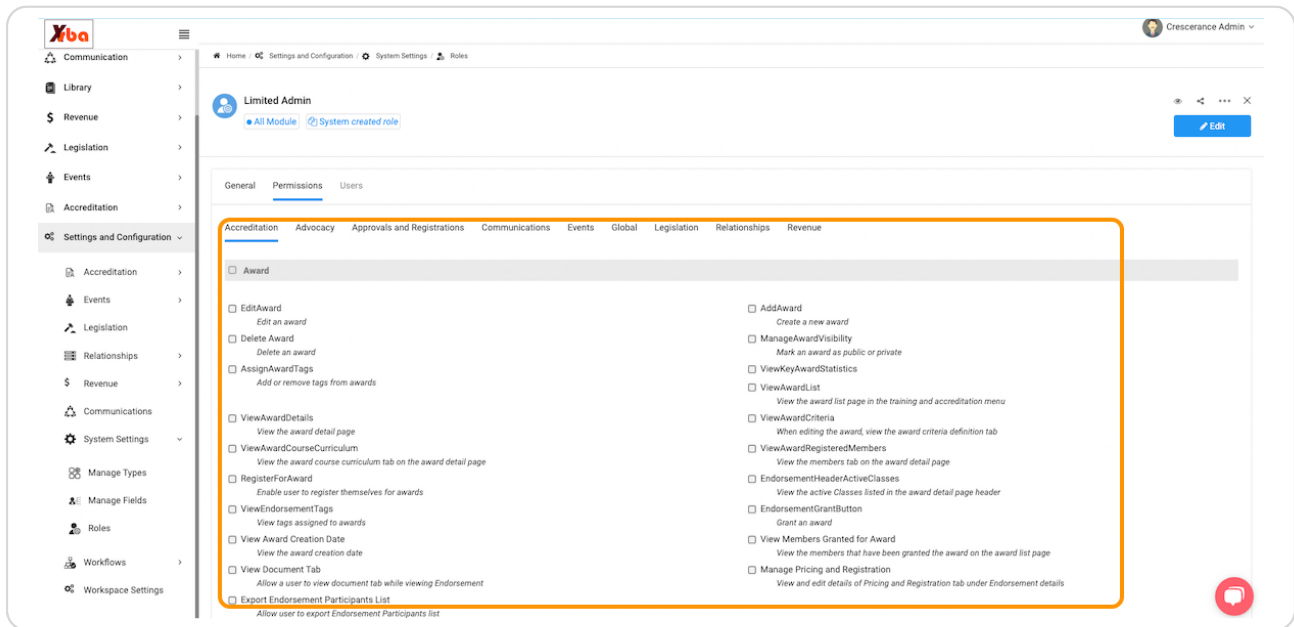
### Click on Edit



The screenshot shows a user profile for 'Crescerance Admin'. The profile information is mostly obscured by horizontal lines. In the bottom right corner of the profile area, there is a blue button with a white pencil icon and the text 'Edit', which is highlighted with an orange border. Above the 'Edit' button, there are several small icons: an eye, a share icon, a three-dot menu, and a close icon.

## STEP 11

Select the module you wish to enable permissions for and then check the box accordingly

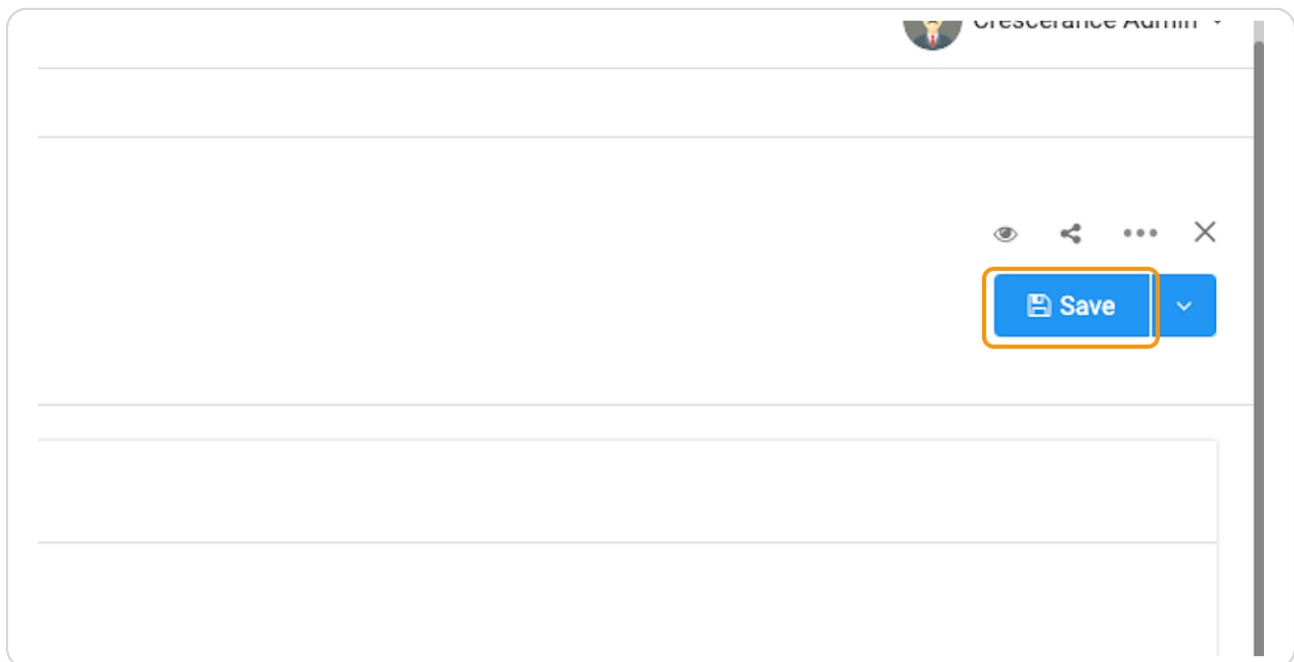


The screenshot shows the 'Limited Admin' role configuration page in the Xba system. The 'Permissions' tab is active, and the 'Accreditation' module is selected. The permissions are organized into two columns:

Permission	Description
<input type="checkbox"/> Award	
<input type="checkbox"/> EditAward	Edit an award
<input type="checkbox"/> DeleteAward	Delete an award
<input type="checkbox"/> AssignAwardTags	Add or remove tags from awards
<input type="checkbox"/> ViewAwardDetails	View the award detail page
<input type="checkbox"/> ViewAwardCourseCurriculum	View the award course curriculum tab on the award detail page
<input type="checkbox"/> RegisterForAward	Enable user to register themselves for awards
<input type="checkbox"/> ViewEndorsementTags	View tags assigned to awards
<input type="checkbox"/> View Award Creation Date	View the award creation date
<input type="checkbox"/> View Document Tab	Allow a user to view document tab while viewing Endorsement
<input type="checkbox"/> Export Endorsement Participants List	Allow user to export Endorsement Participants list
<input type="checkbox"/> AddAward	Create a new award
<input type="checkbox"/> ManageAwardVisibility	Mark an award as public or private
<input type="checkbox"/> ViewKeyAwardStatistics	
<input type="checkbox"/> ViewAwardList	View the award list page in the training and accreditation menu
<input type="checkbox"/> ViewAwardCriteria	When editing the award, view the award criteria definition tab
<input type="checkbox"/> ViewAwardRegisteredMembers	View the members tab on the award detail page
<input type="checkbox"/> EndorsementHeaderActiveClasses	View the active Classes listed in the award detail page header
<input type="checkbox"/> EndorsementGrantButton	Grant an award
<input type="checkbox"/> View Members Granted for Award	View the members that have been granted the award on the award list page
<input type="checkbox"/> Manage Pricing and Registration	View and edit details of Pricing and Registration tab under Endorsement details

## STEP 12

Click on Save when all selections are made



The screenshot shows the bottom right corner of the system settings interface. A blue 'Save' button is highlighted with an orange border. Above the button are icons for visibility (eye), sharing, and a close (X) button.

