## **Batch Assign Roles**

Last Modified on 07/17/2024 9:52 am CDT

This area allows for temporarily changing Users' Roles to one that is restricted, allowing the End of Month process to proceed. Once the month is closed, use this same tool to change the Users back to their original Roles. Users can also be excluded from having their Roles changed.

Before batch assigning Roles, ensure the key User is able to log in and complete the month end process by adding them to the *Exempt Users* tab.

• Assign New Role - Check the Include column to indicate which Users' Roles should be changed. Double-click

in the New Role field to choose from Roles already set up then select Save.

| Assign New Role |       | Assign Previous Role |     | Exempt Users         |  |    |                     |       |      |
|-----------------|-------|----------------------|-----|----------------------|--|----|---------------------|-------|------|
| Include U       |       | User Name User ID    |     | Current Role         |  |    | <new role=""></new> |       |      |
| 1               |       | ounter               | 1   | Admin                |  |    | All Menus Restri    | icted |      |
| 2               | An An | nna Admin            | 1aa | Role1                |  |    |                     |       |      |
| 3               | Ro Ro | obert Ellis          | 1RE | Admin                |  |    |                     |       |      |
| 4               | 🗸 Fu  | Illy Res             | 2   | All Menus Restricted |  |    |                     |       |      |
| 5               | 🗸 Sa  | ally Boo             | ABC | Admin                |  |    |                     |       |      |
| 6               | 🗸 De  | ebe Witter           | DW  | Admin                |  |    |                     |       |      |
| 7               | Free  | ed Jones             | FUJ | Credit Manager       |  |    |                     |       |      |
| 3               | 🗸 Ju  | lie Kirk             | JK  | Admin                |  |    |                     |       |      |
| Э               | Ja    | mes C                | JM  | Controller           |  |    |                     |       |      |
| 10              | 🗸 Ka  | arli Ben             | KB  | Admin                |  |    |                     |       |      |
| 11              | Mi:   | ssy Ha               | MH  | Admin                |  |    |                     |       |      |
| 12              | Ma Ma | argaret              | MR  | Admin                |  |    |                     |       |      |
| 13              | Mo Mo | olly Smith           | MS  | Admin                |  |    |                     |       |      |
| 14              | Ma Ma | ark Willi            | MW  | Admin                |  |    |                     |       |      |
| 15              | Su Su | isie Bo              | SJB | Admin                |  |    |                     |       |      |
| 16              | ✓ ssi | iadmin               | ssi | Admin                |  |    |                     |       |      |
| 17              | ✓ 01  | zTraing              | z01 | Admin                |  |    |                     |       |      |
| 18              | ✓ 02  | zTrain               | z02 | Admin                |  |    | Tag All             |       |      |
| 19              | ✓ 03  | zTrain               | z03 | Admin                |  |    |                     |       |      |
| 20              | ⊻ 04  | zTrain               | z04 | Admin                |  | Υ. | Un-Tag All          |       | Save |
|                 |       |                      |     |                      |  |    |                     |       |      |

• Assign Previous Role – This tab shows Users whose Roles have been changed on the Assign New Role tab.

Check the *Include* column here and select **Save** to assign the User back to their previous Role which is noted under the *Previous Role* column.

| ssign New Role |              | Assign Previous Role |         | Exempt User  | Exempt Users         |   |       |            |      |
|----------------|--------------|----------------------|---------|--------------|----------------------|---|-------|------------|------|
|                | Include      | User Name            | User ID | Current Role | Previous Role        | ' | ^     |            |      |
| •              |              | Counter              | 1       | All Menus    | Admin                |   |       |            |      |
| 2              |              | Anna Admin           | 1aa     | All Menus    | Role1                |   |       |            |      |
| 3              |              | Robert Ellis         | 1RE     | All Menus    | Admin                |   |       |            |      |
| 1              |              | Fully Res            | 2       | All Menus    | All Menus Restricted |   |       |            |      |
| 5              | $\checkmark$ | Sally Boo            | ABC     | All Menus    | Admin                |   |       |            |      |
| 6              | $\checkmark$ | Debe Witter          | DW      | All Menus    | Admin                |   |       |            |      |
| ,              | $\checkmark$ | Fred Jones           | FUJ     | All Menus    | CreditManager        |   |       |            |      |
|                | $\checkmark$ | Julie Kirk           | JK      | All Menus    | Admin                |   |       |            |      |
| )              | $\sim$       | Karli Ben            | KB      | All Menus    | Admin                |   |       |            |      |
| 10             | $\sim$       | Missy Ha             | MH      | All Menus    | Admin                |   |       |            |      |
| 1              | $\sim$       | Margaret             | MR      | All Menus    | Admin                |   |       |            |      |
| 2              | $\sim$       | Molly Smith          | MS      | All Menus    | Admin                |   |       |            |      |
| 3              | $\sim$       | Mark Willi           | MW      | All Menus    | Admin                |   |       |            |      |
| 4              | $\sim$       | Susie Bo             | SJB     | All Menus    | Admin                |   |       |            |      |
| 5              | $\checkmark$ | ssiadmin             | ssi     | All Menus    | Admin                |   |       |            |      |
| 6              | $\checkmark$ | 01 zTraing           | z01     | All Menus    | Admin                |   |       |            |      |
| 7              | $\sim$       | 02 zTrain            | z02     | All Menus    | Admin                |   |       |            |      |
| 8              | $\checkmark$ | 03 zTrain            | z03     | All Menus    | Admin                |   |       | Tag All    |      |
| 9              | $\checkmark$ | 04 zTrain            | z04     | All Menus    | Admin                |   |       |            |      |
| 20             | $\sim$       | 05 zTrain            | z05     | All Menus    | Admin                |   | v   [ | Un-Tag All | Save |

Exempt Users – This area can be used to specify a list of Users to exclude from their Roles being changed.
Choose Select Users, highlight the appropriate Users to include, then select Done. Once this list is populated as needed, choose Save. To remove Users from this area, highlight the row(s) then pressDelete on the keyboard.

|     | New Role A | ssign Prev | rious Role | Exempt Users |  |              |  |
|-----|------------|------------|------------|--------------|--|--------------|--|
|     | User Name  | User ID    | Current R  | ole          |  | Select Users |  |
| 1 🕨 | James Co   | JM         | Controller | r            |  |              |  |
|     |            |            |            |              |  |              |  |
|     |            |            |            |              |  |              |  |
|     |            |            |            |              |  |              |  |
|     |            |            |            |              |  |              |  |
|     |            |            |            |              |  |              |  |
|     |            |            |            |              |  |              |  |
|     |            |            |            |              |  |              |  |
|     |            |            |            |              |  |              |  |
|     |            |            |            |              |  |              |  |
|     |            |            |            |              |  |              |  |
|     |            |            |            |              |  |              |  |
|     |            |            |            |              |  |              |  |
|     |            |            |            |              |  |              |  |
|     |            |            |            |              |  |              |  |