Roles within iLearn

Roles are groups of iLearnOregon accounts assigned a specific set of permissions. Permissions are used to control user access to specific content and functions in the system. A typical registered learner can access the majority of functions in the site. However, certain administrative functions, as well as management of site content, are restricted from general learners by default.

**For the purpose of this job aid the term 'account' will be used instead or 'learner' since you are applying the role to the iLearnOregon account, which isn't always a learner.*

The Roles page allows you to create and edit custom roles and manage the accounts assigned to custom and system roles. You will see this referred to as "elevated roles" in other iLearnOregon job aids.

Permissions

Permissions can be assigned to individual accounts and/or groups of accounts. The group can be an organization, job title, or role. If permissions are assigned to a group, every account in that group is given access to the appropriate function or content item.

Permissions may be granted by:
- Adding individuals to a role; or
- Granting access to the individuals and/or groups for specific content items.

In general, if an account needs to see additional functions in the system, they are added to a role. If an account only needs to manage specific content items, it would be granted permission to manage only the specific content. For example, adding an account to the Course Manager role would give it permission to create and manage classroom courses, online courses, curriculums and tests. However, a user who only needs to manage safety-related classroom courses should not be added to the Course Manager role. Instead, they can be given permission to manage those specific courses.

Role Types

The system has three types of roles:
1. **System**: The site provides functionality that allows administrators to manage the accounts in each system role.
2. **Automatic**: These are automatically created by the system based on a specific event. Accounts are also automatically assigned to, or removed from, a role based on a specific event (e.g., accounts are automatically assigned the User Manager role when they are specified as a manager of another user. They are automatically removed from this role when they are removed as a manager from all users.).
3. **Custom**: These are new roles created and managed in the system by authorized users. Custom roles can be associated with permissions and training assignments.

Common Roles

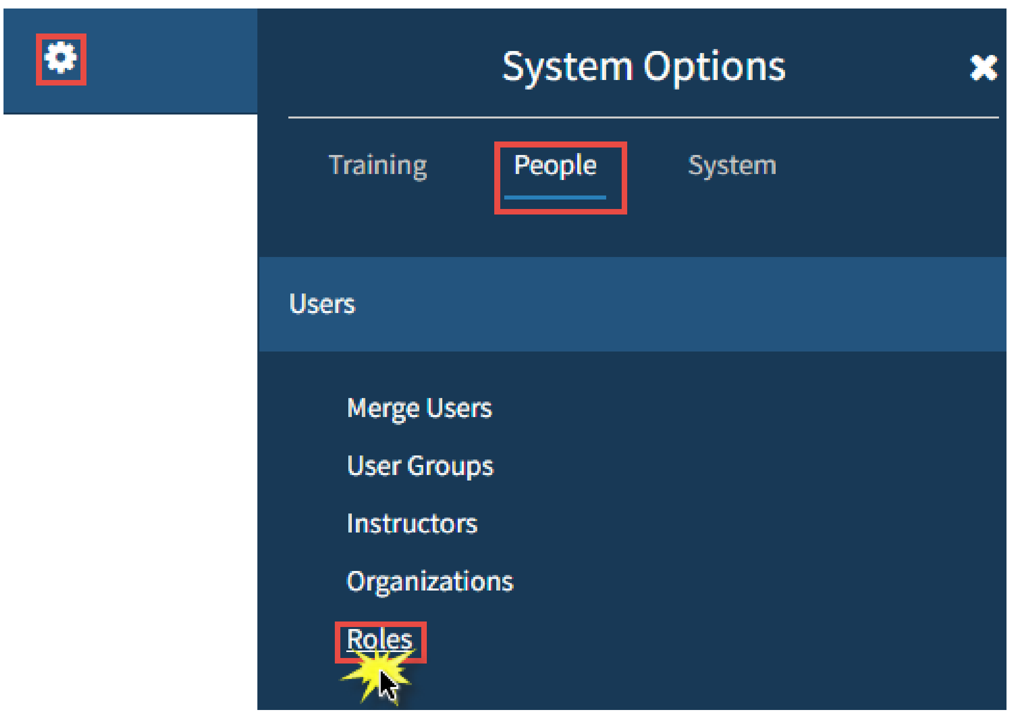
- **Enterprise Administrator**: iLearn has an Enterprise Administrator role for the DAS – CHRO system administrator. This role has administrator permissions for every domain and is the only role to assign the Domain Administrator Role.
- **Domain Administrator**: If an account is added to the administrator role in a descendant domain, they become a Domain Administrator, which means they are only an administrator for that domain. The title of this role is still listed as "Administrator," even if it refers to an administrator in a descendant domain. The Enterprise Administrator is the only person who can add an administrator for a domain. Accounts in this role may access all features of the site. They can also create, edit, and delete course and content types and have access to run and manage all reports.
  - o **The appropriate number of Domain Administrators an agency has will depend on size and use of the system**. The Domain Administrator role will be assigned sparingly, most functions can be accomplished with other lower level roles.
- **Course Manager**: Accounts in this role can add, edit, and delete all course-related content, such as SCORM 1.2 courses, SCORM 2004 courses, classroom courses, curriculums, tests, etc. They can also add and edit content surveys, assign required training, and create training profiles. (Assigned by Domain Administrator)
  - o **The Course Manager role will often be assigned with the Content Manger, Report Manager, and Instructor roles**.
- **Instructor**: Individuals in this role can be assigned to teach classroom course section events. They can also be associated with tests that include essay questions. Instructors have access to the Instructor Tools area, where they can administer courses they are assigned to teach and grade course assignments and essay questions included with tests. (Assigned by Domain Administrator or Course Manager)
  - o **Instructors MUST be members of the domain the training was created in.** If you have someone from a different agency instructing your course, you need your iLearn Administrator to give them membership to your domain.
- **Report Manager**: Accounts in this role can manage all reports (standard and custom) in the Reports Console and create new custom reports. (Assigned by Domain Administrator)
- **User Manager**: Individuals in this role may access the Approval Console and all manager reports, and they are copied on certain system emails sent to users they manage. Users are automatically added to this role when they are specified as a manager of another user. They are automatically removed from this role when they are removed as a manager from all users.

For a full list of Roles and explanations click here.

Note:

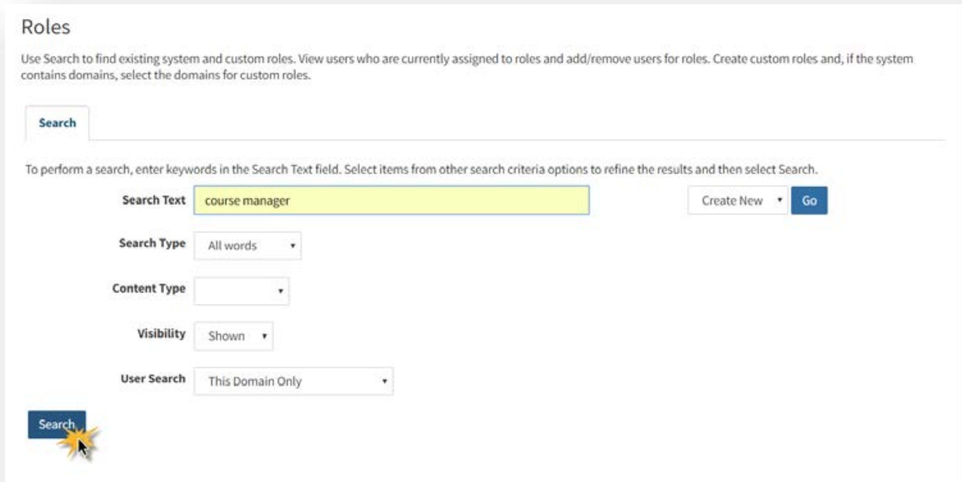
- The system includes an "Everyone" role for each domain that can be seen on Edit Permissions tabs within workflows when editing content. This role is not editable. Accounts are automatically added to this role when they register to use the system. Accounts cannot be removed from the role.
- Permissions and role changes may not take effect until you (or the affected users) log out of the system and then log in again.

On the top menu bar *click* on **System** icon and a slide out menu to the right will appear. *Click* on **People, Users** and then on **Roles**.

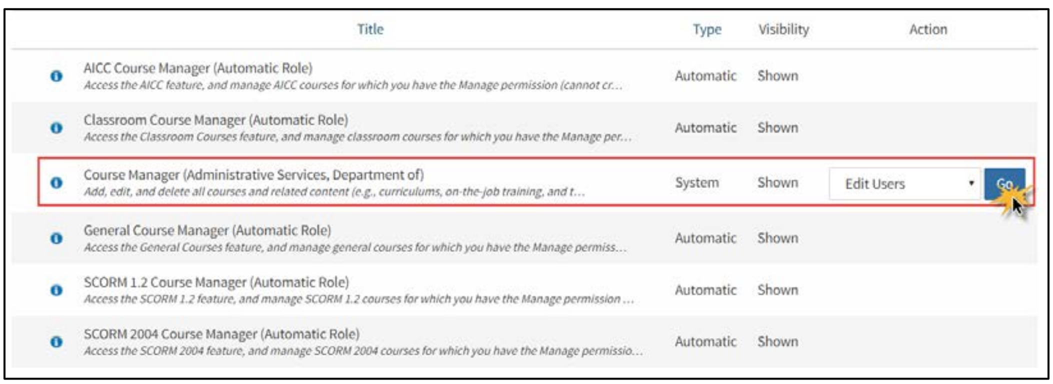


Add an account to a role

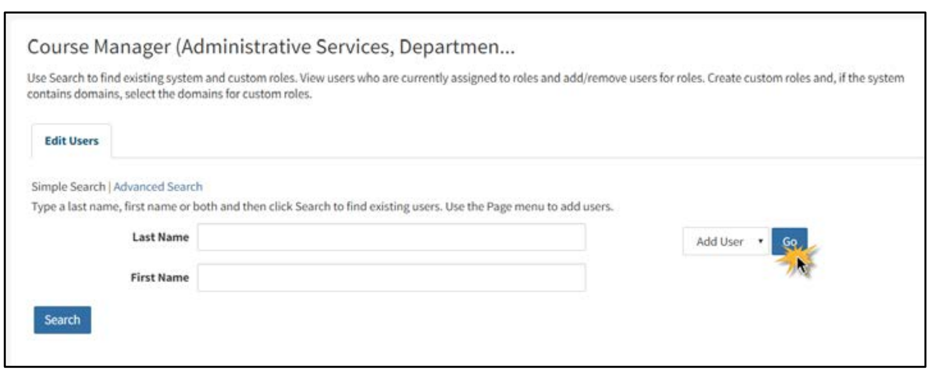
1. *Search* for the role you want to add an account to.



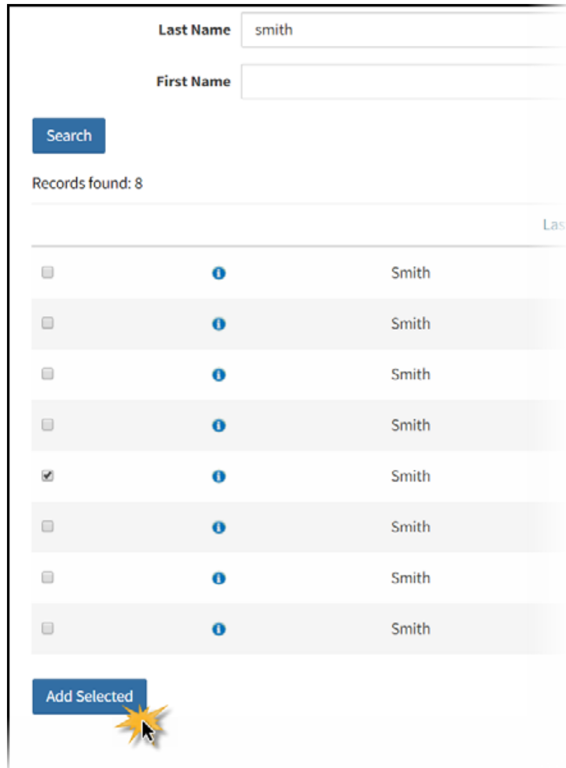
2. *Click* **Go** next to Edit Users.



3. Add User **Go**.



4. *Search* for the name you are adding, *select* the name then *click* **Add Selected**.

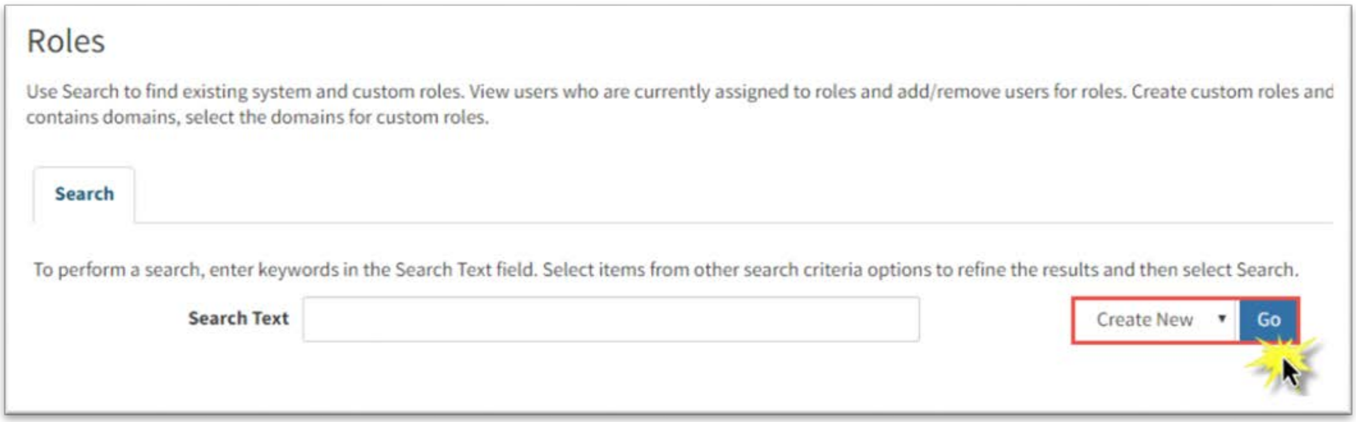


You will receive this message when the account has been added successfully

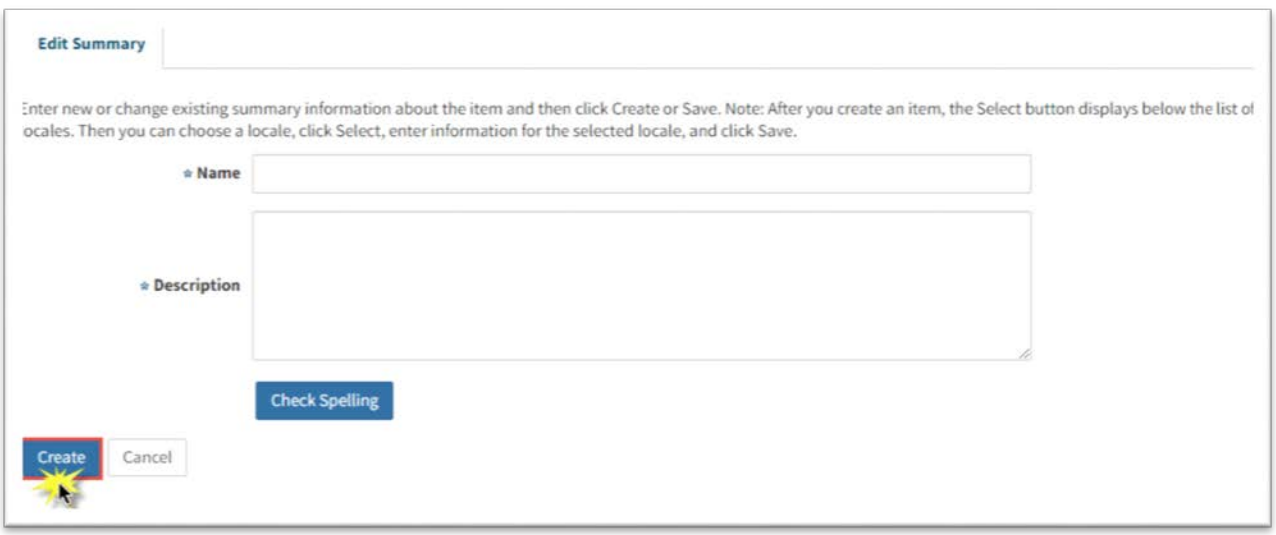
The user(s) was added.

Create a new role

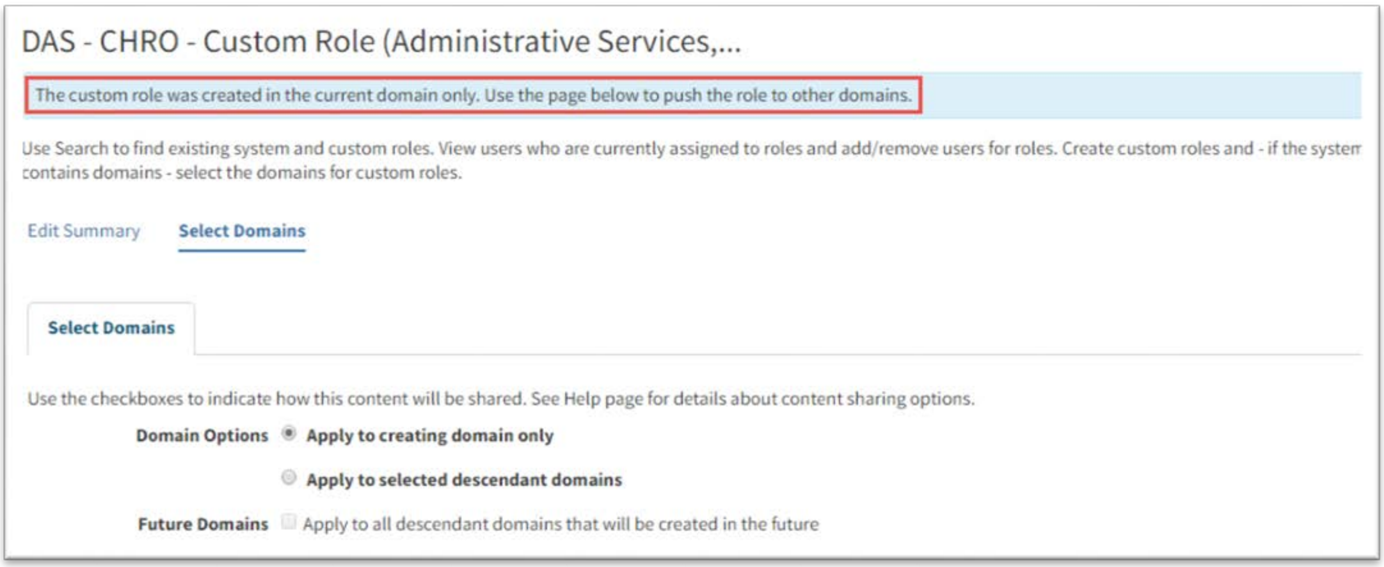
1. *Select* **Create New** from the page menu and then *click* on **Go**.



2. Enter the Name of the custom role and Description in the provided fields. *Select* **Create**.

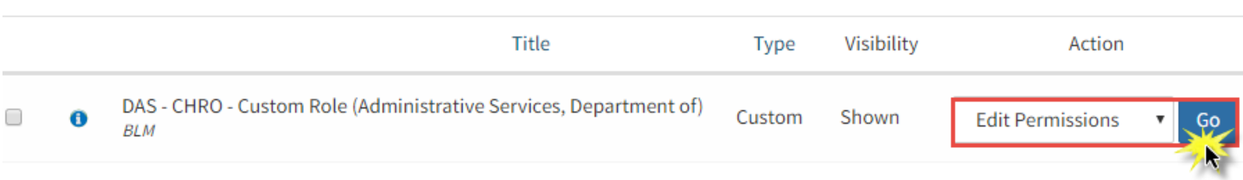


3. After you select the Create button, you automatically navigate to the Select Domains and will see a confirmation that the role was created. You can only share the role with subordinate domains (if your agency has any) otherwise it is only available in your agency domain. *Click* **Save** at the bottom of the screen.



4. This option allows you to edit the permissions assigned to a custom role. Permissions determine which areas within the system users may access and what actions can be performed within specific areas. For example, permissions determine that a user may have access to the content management area where he or she can search for documents, but the user may not be allowed to create a new document.

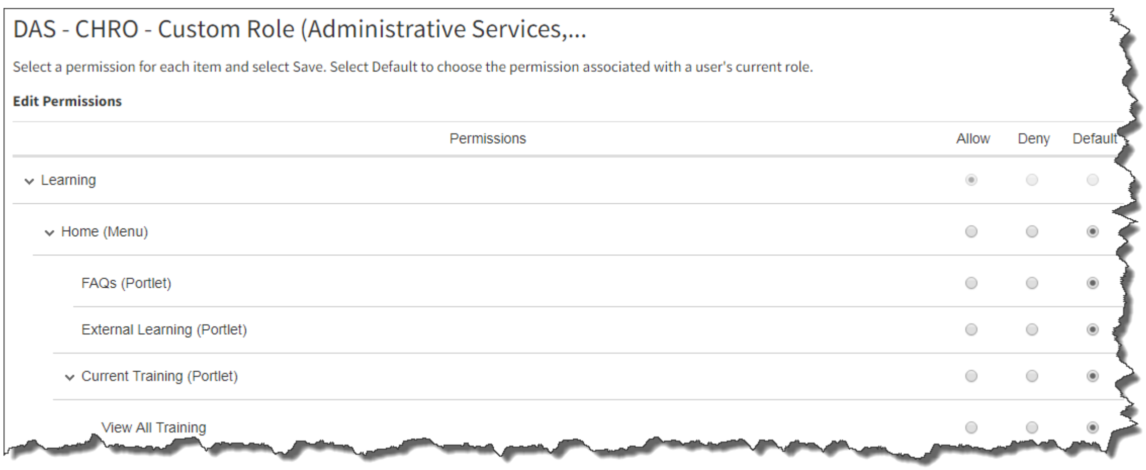
   Select **Edit Permissions** from the Action menu for the role. *Select* **Go**. The Edit Permissions page displays.



5. A table displays a list of all system areas arranged in order in which they appear within the system. As a result, some areas are nested within others. Use the arrow icons to expand and collapse sections of the table, as needed.

   There are three types of permissions you can assign to a custom role.
   - Allow: Users with the custom role may access the selected area of the system (e.g., Reports, Manage Enrollment for Online Courses, etc.).
   - Deny: Users with the custom role are denied access to the selected areas of the system.
   - Default: The custom role does not affect the user's permission to access the selected areas of the system. Permissions are determined by the roles to which the user has already been assigned.

   Select the radio buttons that correspond to the desired areas of the system and the appropriate permissions. *Select* **Save** when you are done assigning the permissions.



6. Once you are done assigning the permissions you'll need to add users to the role. *Follow the steps above '*Add an account to a role*'.*