



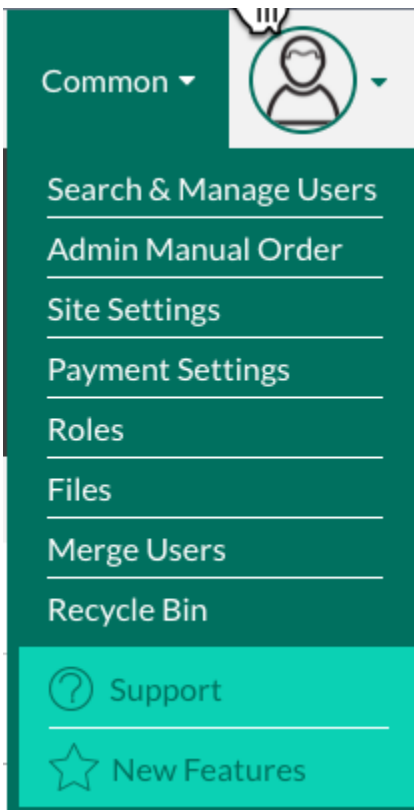
How to Assign Security Roles to Users on Blue Sombrero

Security Roles

Give members full administrative access or restrict their access to only allow them to have certain privileges. This would be useful for Treasurers, Registrars, and various types of Board Members.

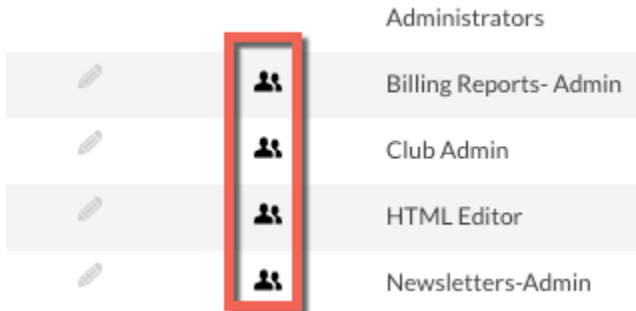
Steps to Assign Security Roles to Users:

1. Go to **Common >> Roles**.



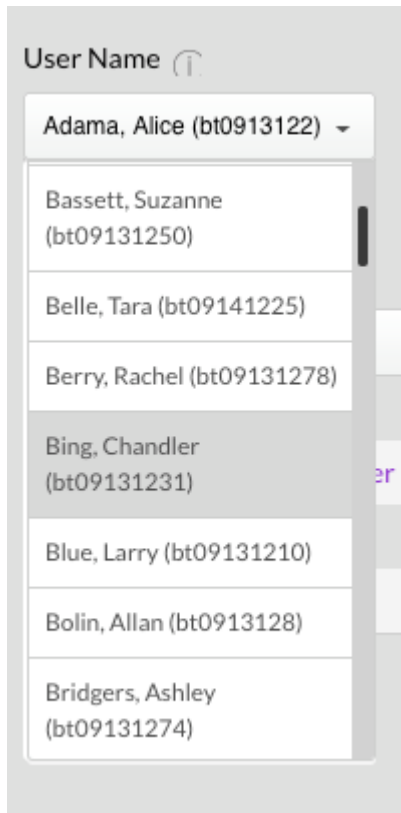


2. Click on the **people icon** next to the role you'd like to assign a user to.



See the “Definition of Roles” Handout for an explanation of each Security Role.

3. Select the account from the drop down menu.





4. Give the role an optional **Effective Date** and **Expiry Date**. If you leave these dates blank, the user will have the role immediately and up until you remove it from their account.
5. Click on the **Add Role to User** button.

User Name	Effective Date	Expiry Date	
Bing, Chandler (bt0913123 ▾)	<input type="text"/>	<input type="text"/>	

***Note: If you assign yourself Club Admin access, then you do not need any other security role on your account. This will only cause conflicts and in the end give you less access!**

6. If you would like to remove a security role from a user's account, simply click the **trashcan** next to their assigned security role and they will no longer have that role's permissions.

Send Notification?

	Security Role
	Club Admin
	Registered Users

***Important:** An account should never have more than 2 or 3 security roles assigned to it at any given time. If a user has several roles assigned to his/her account, then they might have trouble accessing certain features of your site because the roles and their permissions are conflicting - ultimately causing view and edit issues on the site.

***Note: If you assign yourself Club Admin access, then you do not need any other security role on your account. This will only cause conflicts and in the end give you less access!**



If you do need further assistance, Regional Commissioners will receive priority support by emailing aysosupport@bluesombrero.com or by calling 866-258-3303. Parents with questions may email support@bluesombrero.com.