

There are three pre-populated **Roles**: Module Administrator, Read-only, and Reporter.

Add additional Roles.

This drop-down allows you to add user assignments as well as add reporting tags.

Checking the box allows you to copy or delete the Role.

Opening a user's **User Assignment**, allows you to remove an assignment or transfer the assignment to someone else.

Filter or sort each column, as desired.

In both **Roles** and **User Assignments**, selecting the link opens the function.

Name	Description	Roles	Email	Active/inactive	Reporting tags	Last updated on	Last updated by
Karen Loftus	3rd Party Claims Manager, Compliance mo...	karen.loftus@ineight.com	Active	Confidential, HR	01-13-2021	Karen Loftus	

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EDIT ROLES

MODULE SETTINGS



Depending on the role, each tab may require some or all of these functions enabled.

Edit role

Name: Module administrator

Description: Module administrator - Provides access to all administration features

MODULE EVENTS ROLES/USERS TEMPLATES PROJECT SETTINGS HISTORY

☒ Edit module summary ☒ Create and edit categories ☒ Create and edit statuses

☒ Edit email templates ☒ Manage module organization exclusions ☒ Create and edit classifications

☒ Create notifications ☒ Create and edit types

☐ Make this role read only ⓘ

Turns on / off the Project Structure toggle.

Ability to access and manage project structure header template.

Allows users to create ITPs on the project.

Ability to access and manage ITP header template.

Turns on / off the ITP for the project.

Turns on / off User Groups for the project.

Allows users to create / edit User Groups on the project.

Edit role

Name: Module administrator

Description: Module administrator - Provides access to all administration features

MODULE EVENTS ROLES/USERS TEMPLATES PROJECT SETTINGS HISTORY

☒ Enable/ Disable Project Structure ☒ Manage Project Inspection and Test Plans

☒ Edit header template ☒ Create and edit Inspection and Test Plans

☒ Edit header template ☒ Create and edit User groups

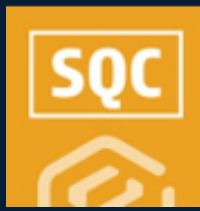
☐ Make this role read only ⓘ

Cancel Save


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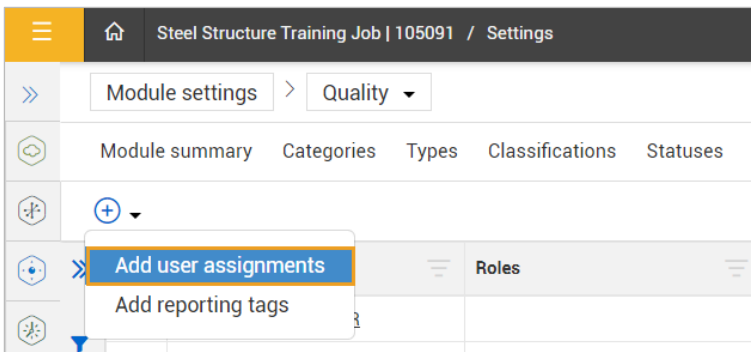
USER ASSIGNMENTS

MODULE SETTINGS



ADD USER ASSIGNMENTS

1. Within a project, and from the User Assignments tab, click the  icon, and select **Add user assignment**.



2. Search for and select the user(s), then click **Next**.
3. Select the organizations/projects, then click **Next**.
4. Select the categories, then click **Next**.
5. Select the roles, then click **Done**.

NEED SOME MORE HELP?



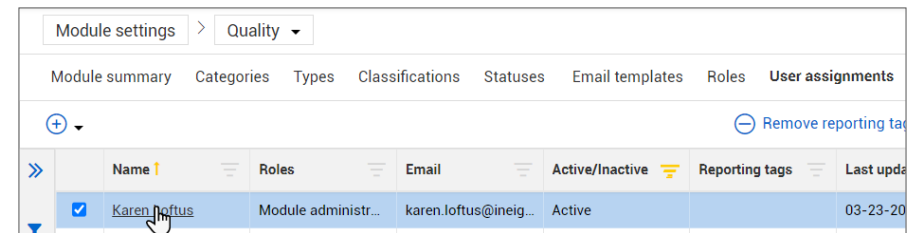
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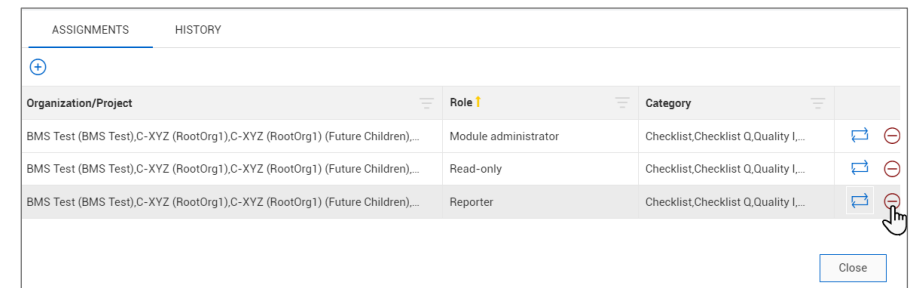
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REMOVE USER ASSIGNMENTS

1. Within a project, and from the User Assignments tab, click to open a user's Name.



2. On the Assignments tab, select the **Remove Assignment** icon for the desired user's role.



3. Select the organizations/project to be removed, then click **Next**.
4. Select the categories to be removed, then click **Done**.

TIP: When an individual no longer needs an assignment use the **Transfer Assignment** function to transfer the assignment to another individual.

Checklist, Checklist Q, Quality I,...



Transfer assignment