

Create a role with custom permissions

Duplicate a preset role or start from scratch, choose None, View or Manage for each feature, compare roles and delete the ones you don't need.

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Before you begin

- ✓ You need the Manage collaborators permission.
- ✓ You can only grant a role permissions you already hold.

1

STEP 1 OF 4 · 30 S

Open Roles & permissions

Open **People** → **Roles & permissions**. You see the preset roles and the ones created by the community. Select **New role**.

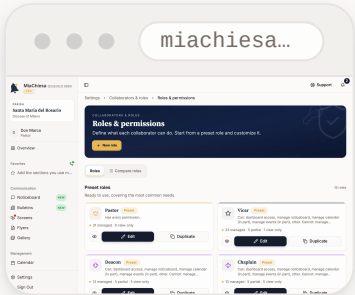


Fig. 1 Custom roles are added alongside the presets.

2

STEP 2 OF 4 · 30 S

Choose the starting point

In the **New role** dialog choose a preset role to duplicate (the fastest, safest way) or **Start from scratch**, with no permissions on.

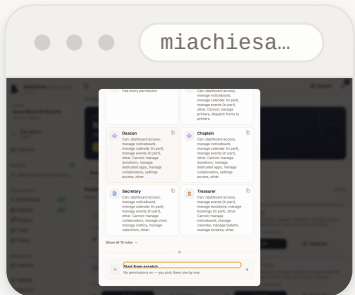


Fig. 2 Duplicating a similar role starts you from the right permissions.

3

STEP 3 OF 4 · 3 MIN

Set name and permissions

In the editor write the **Role name** and pick a free **Icon**. For each feature choose **None**, **View** or **Manage** ("Manage" always includes "View"). Use **Search a permission...** to find a feature quickly.

Select **Save role: Role saved** appears and the new role is available when you assign someone.

Merged pastoral unit

In Merged mode the editor also shows **Role scope**: Pastoral Unit level, All parishes or Specific parishes. You need it, for example, for two parish offices, each on its own parish; the role scope guide explains how.

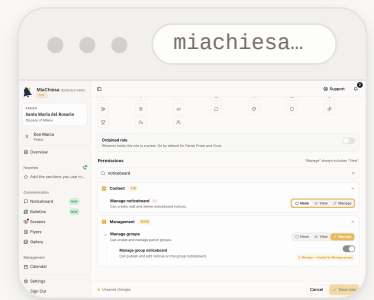


Fig. 3 Each feature has three levels: None, View, Manage. Unsaved changes are flagged at the bottom.

4

STEP 4 OF 4 · 1 MIN

Compare or delete

The **Compare roles** tab lays out every role's permissions side by side. To delete a custom role use **Delete**: if someone holds it, choose whether to move them to another role or remove them from the staff.

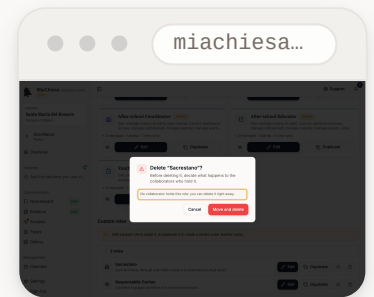


Fig. 4 If nobody holds the role, you delete it right away.

What you have achieved

- ✓ The new role has exactly the permissions you chose.
- ✓ You can assign it when you give a collaborator a role.

Troubleshooting

I see “Permission denied: you can only grant permissions you already hold.”



You picked a permission your own assignment lacks. Remove it or ask someone with more permissions.

I see “This icon is already assigned to another role.”



Each role needs a different icon: pick another.

I can’t remove Manage collaborators



For safety you cannot remove this permission from your own assignment, nor from the last person who has it.