

Assign a collaborator role

Open an existing person, choose a role and review its permissions and scopes before confirming.

4 min · Available; adding staff respects the plan collaborator limit · 2026-09-27

Before you begin

- ✓ You need Manage collaborators in the active workspace.
- ✓ The person must have an account and appear as a follower or group member for direct assignment.

1

STEP 1 OF 4 · 1-2 MIN

Open People

Open People in the correct community or pastoral unit. Depending on your permissions, the People tab combines followers, staff and group members.

Use the invitation flow for someone without an account. Assign role works with a person the system already recognises.

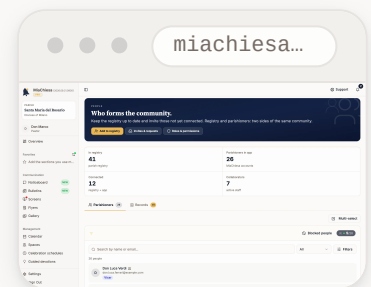


Fig. 1 Start in the correct workspace before granting a role.

2

STEP 2 OF 4 · 1-2 MIN

Open the person

Select a row and check name, contact, groups and current status. A follower or group member with an account shows Assign role; existing staff show Edit role and Remove role instead.

Do not assign a second role to correct an existing assignment. Use Edit role.

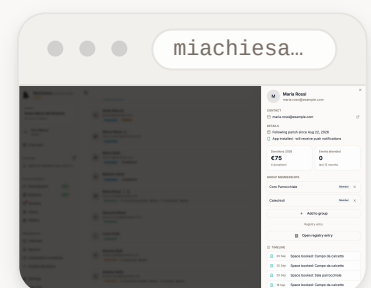


Fig. 2 The drawer shows an existing account that is not yet staff.

3

STEP 3 OF 4 · 1-2 MIN

Choose role and scopes

Select Assign role. Volunteer is preselected; open View permissions to understand the access before confirming. Some roles also require one or more communities or groups as an assignment scope.

In a Merged pastoral unit, if you pick a role limited to some parishes, **Where the assignment applies** appears: tick the parish where the person works, for example their parish office. If they already hold an active assignment in that parish, the new role replaces it.

The capture leaves the dialog open on its default role and does not press Add to staff, so no assignment is made.

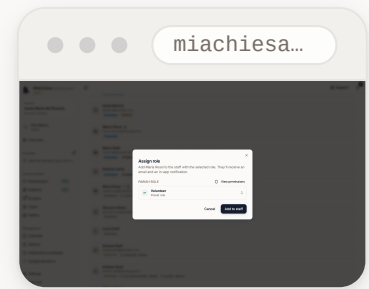


Fig. 3 The role is preselected but not confirmed in the capture.

4

STEP 4 OF 4 · 1-2 MIN

Confirm deliberately

Apply least privilege, complete all required scopes and press Add to staff. The list is refreshed and a notification is sent; email delivery is best effort and does not determine assignment success.

The number of staff members is limited by the plan. If the quota is full, the assignment is rejected and a quota notice appears.

What you have achieved



You identified the person, role and required scopes.



No role was assigned in the demonstration capture.

Troubleshooting

Assign role is missing



The person may already be staff, may not have an account, or your role may lack Manage collaborators.

Add to staff is disabled



Complete the scopes required by the selected role, such as communities or groups.