



## Los Angeles Unified School District Division of Instruction

### Customizing User Roles and Rights in Naviance

A school site manager can create an unlimited number of custom user roles in Naviance. Each role will have a specialized set of rights to fit the needs of the faculty and staff members at your school.

#### To update a user role:

1. Go to **Gear** (far right of blue bar) > **Setup > User Admin**
2. From the list of staff members, find the staff member whose user role needs to be updated.
3. For that staff member select **Edit**.
4. Go down to the option for **Permissions Role**. Select the dropdown. Select the new user role.

ACCOUNT INFORMATION

Status:  (required)

User Name:  (required)

E-mail:  (required)

Confirm E-mail:  (required)

Permissions Role:  (required)

IMPORTANT

5. Select **Update User** at bottom of screen.

#### To create a custom role:

6. Go to **Setup > User Admin**.
7. Click **Manage Roles and Rights** in the **Admin Options** menu.
8. Click **Add New Role**.
9. Enter the role name.
10. Check the boxes to enable rights for this role.
11. Click **Create Role**.

The role will then be displayed in your list of user roles. Once a role has been created, it can be managed in several ways including modifying the role permissions, edit the name of the role, and cloning the role.

#### To modify the role permissions:

1. Go to **Setup > User Admin**.
2. Click **Manage Roles and Rights**.
3. Click **Manage** for the role you want to manage.
4. Click **Modify Permissions**.
5. Check or un-check the boxes next to the permissions you want available for the role. (See Permissions Checklist-School for list of all permissions and explanation)
6. Click **Submit** at the bottom of the page to confirm the modifications to the permissions.

#### To edit the name of the role:

1. Go to **Setup > User Admin**.
2. Click **Manage Roles and Rights**.
3. Click **Manage** for the role you want to edit.
4. Click **Edit Role**.
5. Change the name of the role.
6. Click **Submit** to confirm the name change of the role.

#### To clone a role:

1. Go to **Setup > User Admin**.

2. Click **Manage Roles and Rights**.
3. Click **Manage** for the role you want to clone.
4. Click **Clone Role**.
5. Type new name for the role.
6. Click **Submit** at the bottom of the page to confirm the modifications to the permissions.  
**Note:** When changing a single user from one role to another, you can edit that user's account rather than using the role management options.

To modify a user's role:

1. Go to **Setup > User Admin**.
2. Locate the name of the user you want to modify.
3. Click **Edit** next to the user's name.
4. Select the new role from the **Permissions Role** drop-down.
5. Click **Update User** to update the user role.