# Manage Access Roles

## Gold & Platinum Clients

The various access roles provided in Vision will allow individual users or groups of users the ability to perform certain tasks or view specific information. Granting access roles lets you add system administrators to your system, give Data Manager privileges, allow Reporting access, and provide supervisors visibility to employees that report to them. This guide will outline the process to add roles to an individual or by position.

To access **Roles**, you must be set up with permissions to the **Admin Console** role.

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## Access Role Definitions

Below are the **Organizational Roles** available in Vision and what each role does.

| | |
|---|---|
| Admin Console | ▪ Highest level of permissions for Vision system administrators<br>▪ Full admin access to the **Admin Console**, **Learning Center**, and **New Admin Experience** applications<br>▪ Limit only to a few trusted employees to help manage and maintain Vision for the organization<br>▪ When logged in to Vision, users will land on the Dashboard of the **New Admin Experience** |
| Data Manager | ▪ Allows user access to the **Data Manager** application where all the company's Employees, Locations, and Positions are managed<br>▪ This permission is typically enabled in conjunction with the **Admin Console** role<br>▪ When logged in to Vision, users with *only* the Data Manager access role enabled will land on the Dashboard of the **Data Manager** |
| Reporting | ▪ When logged in to Vision, users given this role *only* will land on the Dashboard of the **Reporting** application to pull data for employees assigned to them in the Data Manager; or if a Group Leader, view employee information for members of their group(s) – which includes:<br>* Quick Reports * Custom Reporting options *Distributions<br>▪ Users also given the **Admin Console** role will have access to <u>**all**</u> data and Admin Quick Reports |
| Learner | ▪ All users will automatically be set up as a learner in Vision and have access to the **Learning Center** application to complete training<br>▪ Users without any roles enabled will land on the Learning Center homepage when logging in to Vision. |

*All users with roles enabled for the **Admin Console**, **Data Manager**, or **Reporting** will also be able to access the Vision **Client Resource Center** (CRC).*

*If you are also a Grace Hill Validate customer, an additional **Validate** role will be available. Please reference the [Administer Validate – System Administrator Guide] for more information.*

## Access Role Definitions *(continued)*

Below are the **Learning Management Roles** available in Vision and what each role does.

**Custom Role**

*Platinum customers only*

- Allows user access to view employee profiles at the same location assigned to them in the Data Manager; or if a Group Leader, view employee information for members of their group(s)
- Allow user the ability to enroll/unenroll their employees from Instructor-Led Training (ILT) sessions
- Allow user to add Individual Assignments to their employees
- When logging in to Vision, users will land on the **New Admin Experience** Dashboard.

**Manage Team**

- Allows user access to view employee profiles that are at the same location as them in the Data Manager; or if a Group Leader, view employee information for members of their group(s)
- When logging in to Vision, users will land on the **New Admin Experience** Dashboard.

**Instructor**

- Provides permissions for a user to schedule Instructor-Led Training (ILT) sessions, enroll employees into sessions, mark attendance, and close/inactivate sessions.
- User is added as an Internal Instructor *(New Admin Experience > Courses > Manage Instructors & Locations)*
- When logging in to Vision, users give this role *only* will land on the **Instructor-Led Training** screen

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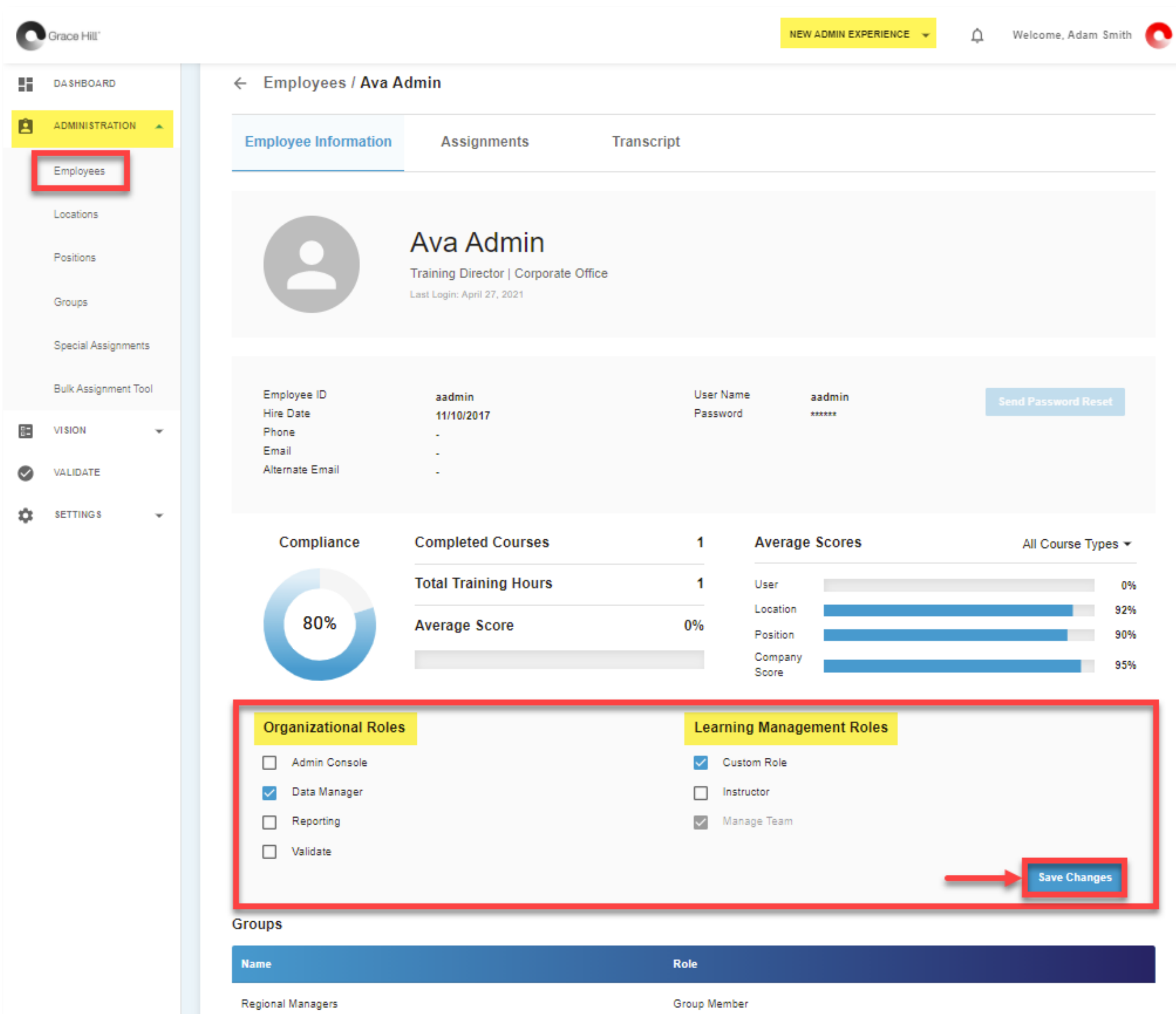
## Manage Employees Roles

Follow the below steps to enable Organizational Roles or Learning Management Roles to a user in Vision.

1. Once logged in to Vision, you'll land on the Dashboard of the **New Admin Experience**.
2. Select **Administration** >> **Employees**.
3. Find and click the employee's name to open their profile.
4. Select the checkbox(es) for the role(s) needed to enable for the employee.
5. Click **Save Changes** to activate the role(s).
6. To **remove** a role from the employee, uncheck the needed box, then click **Save Changes**.

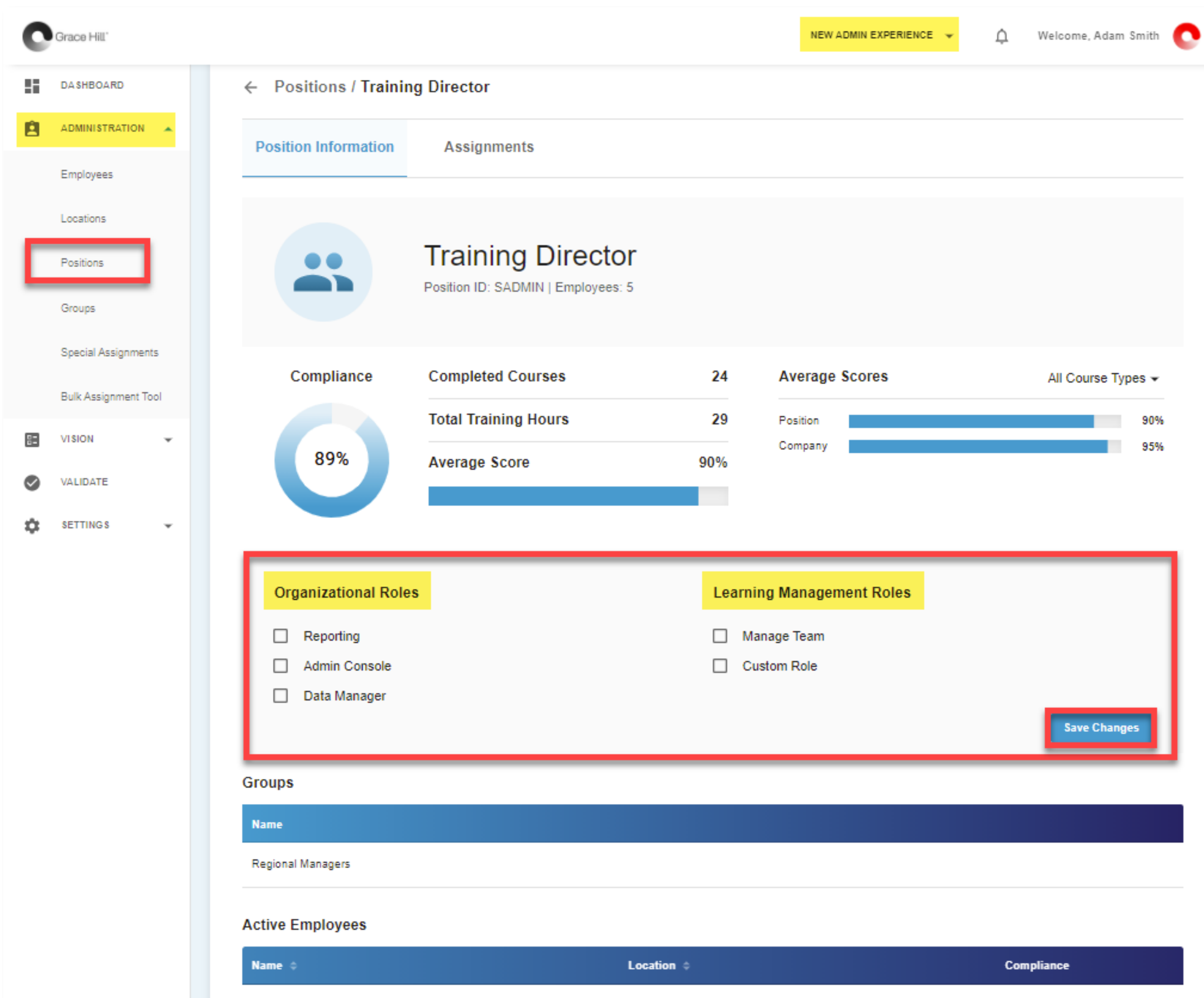



*If a role is checked but greyed-out – such as the role above for 'Manage Team' – this means that the role has been enabled for the position of the user.*

## Manage Position Roles

Follow the below steps to enable Organizational Roles or Learning Management Roles to a position in Vision.

1. Once logged in to Vision, you'll land on the Dashboard of the **New Admin Experience**.
2. Select **Administration** >> **Positions**.
3. Find and click the position name to open the profile.
4. Select the checkbox(es) for the role(s) needed to enable for the position.
5. Click **Save Changes** to activate the role(s).
6. To **remove** a role from the position, uncheck the needed box, then click **Save Changes**.




*Once a role is enabled for a position, all employees with the position assigned to them in the Data Manager will receive the granted access.*