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Link: https://help.responsiblefleet.com/docs/driveri-portal-user-roles/creating-editing-custom-roles/ Last Updated: February 28th, 2022

You can create and edit custom roles from the Roles page in the Portal (available under Provisioning & Configurations from the Navigation bar). Custom Roles are useful when fleets require users to manage certain operations that are different from the standard user role permissions.

Note. You must be a Tenant Super User to create and/or edit custom roles. See more about available roles here.

Creating a Custom Role

A custom roles is created by disabling one or more privileges from any of the pre-defined standard User Roles. When a custom role is created, it becomes available as a Role option when creating or editing users.

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How to create a custom role:

1. From the Navigation Bar, click **Provisioning & Configurations** (wrench icon).

A pop-up menu appears.

2. Click Roles.

The Roles page appears.

3. Click Create Custom Role.

The Create Role dialog box is displayed.

4. In the Name field, enter the name of the role. optional description for the role.

Creating & Editing Custom Roles



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- 5. (Optional) In the Description field, enter a description for the role.
- 6. Use the drop-down menu under **Select the Base Role** to select the role that the custom role should be modeled after.
- 7. Select the privileges to be provided to this role and click **Review Changes**.

The Review Summary page of the custom role displays changes made to the access settings.

8. Review the changes and click **Save Changes**.

Editing a Custom Role

Only the custom roles can be edited. All the predefined user roles and custom roles can be viewed in detail.

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How to edit a custom role:

1. From the Navigation Bar, click **Provisioning & Configurations** (wrench icon).

A pop-up menu appears.

2. Click Roles.

The Roles page appears.

3. Click Edit next to the custom role that you want to update.

The Edit Role dialog box is displayed.



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4. Make the required changes to the access settings.

Note. You cannot change the base role from which this custom role was created. The dropdown list to select the Base Role is disabled.

- 5. Click Review Changes.
- 6. Review the changes and click **Save Changes**.