ARTICLE DETAIL

USER PERMISSIONS (ROLES)

User Roles govern access to the Relias Platform functionality. There are several different user roles that can be assigned within the Relias Platform: Applicant, Learner, Data Entry, Observer, Performance Optimizer Reporter, Supervisor, Instructor, Administrator, and Sites Administrator. The user roles can be assigned in any combination and all together (with the exception of the Sites Administrator and Applicant roles. Sites Administrator is unique to Enterprise sites. To learn more about Enterprise sites, please see Enterprise Features. Applicant is unique to the Relias Assessments solution. To learn more about Applicants see Relias Assessments - Applicant User Role. User permissions can be assigned by an Administrator, which is done in the user profile.

Here is a quick reference chart listing User Roles and common tasks performed on the Relias Platform. You may click the image below to

enlarge it.

Task	Administrator	Instructor	Supervisor- User Management	Supervisor - Enrollment Management	Supervisor - Report Management	Learner
Marking Modules Complete	Refer to Settings	Refer to Settings	X	Refer to Settings	X	X
Create and Edit Modules	✓	✓	X	X	X	X
Enroll Learners into Modules	✓	✓	X	✓	X	X
Add/Edit Users	✓	X	✓	X	X	X
Create and Edit Training Plans	✓	X	X	X	X	X
Enroll Learners into Training Plans	✓	X	X	✓	X	X
Run and Save Reports	✓	X	X	X	✓	X
Edit Saved Reports	✓	X	X	X	✓	X
Upload Video Files	✓	✓	X	X	X	X
Bulk Import User Data	✓	X	X	X	X	X
Grant New Roles to Users	✓	X	X	X	X	X
Edit Site Hierarchy	✓	X	X	X	X	X
Create External Training Template	✓	X	X	X	X	X
Add External Training to Transcript	✓	X	X	✓	X	X
Enroll in Career Path	✓	X	X	✓	X	X
Create Career Path	✓	X	X	X	X	X
* Create EFS Survey	✓	X	X	X	X	X
* Run EFS Survey Report	✓	X	X	X	X	X
Record Skills Checklist Observations	X	X	X	X	X	X
Run Competency Review Reports	✓	X	X	X	✓	X
Create Policy and Procedure Binders	✓	X	X	X	X	X
Edit Policy and Procedure Documents	✓	✓	X	X	X	X
Complete Assigned Learning Modules	X	X	X	X	X	✓
† Complete Unvalidated Assessments	X	X	X	X	X	✓
† Complete Validated Assessments	X	X	X	X	X	✓

- **Learner:** This is the default setting for all new users, and all Relias Platform users will have the ability to select their Learner role at any time. ***This is the only role where you can complete your assigned modules.*** Along with taking required modules, Learners can also can self-enroll in elective modules, if permitted by their organization, and enter External Training records. Additionally, they have access to Relias Connect for Support Resources, and their Licenses & Certifications.

- **Supervisor:** Supervisors have access to data in their Hierarchy level, sub-levels of their hierarchy, and additional hierarchies according to access the Administrator has granted. Usually, you will grant Supervisor permissions to the employee responsible for ensuring that all training is completed in a specific department. There are five access levels for Supervisors: **Report Management, Enrollment Management,** and **User Management**. The thee access levels can be selected independent of each other and in any combination.

  Supervisor access will enabled the following functionality (please see below for more specified access, per assigned role)

  - Export Users within their hierarchy as an Excel document.
  - Email Users within their hierarchy from directly in the Relias site.
  - Access the "Blue Book" transcript page of anyone in their hierarchy and, if enabled, add external training

- Be selected as the Notifications Recipient for the hierarchy level they are placed in.
- Enroll Learners into a Career Path

- The **Report Management** Supervisor can be considered the most basic level of Supervisor access assignable. A **Report Management** Supervisor can:
  - Run reports to learn more about the training performance of the Learners in their hierarchy level.
  - Export reports as PDFs, Excel, or CSV files.
  - Save reports to be accessed later.
  - Automate saved reports to be sent to themselves, Administrators, and anyone else with Reporting Management Supervisor access.

- The **User Management** Supervisor can be considered the highest level of access for a Supervisor. The **User Management** supervisor can:
  - Create new Learners in their hierarchy level.
  - Deactivate Learners in their hierarchy level.
  - Reactivate previously deactivated Learners in their hierarchy level.
  - Add hierarchy levels under their existing hierarchy level.
  - Review and update user profiles, such as passwords, emails, job titles, etc.

- The **Enrollment Management** Supervisor is the next level of access. **Enrollment Management** Supervisors can:

  - Assign individual modules to Learners in their hierarchy.
  - Assign training plans created by Administrators to Learners in their hierarchy.
  - Unenroll Learners from modules and training plans.
  - Add external training to a Learner's transcript.
  - Change due dates for modules.
  - They can mark Learner completions (based on module settings, for modules that are not included in the Relias Module Library).
- **Instructor:** Instructors have the ability to author and edit modules. Instructors can enroll and unenroll all Learners from event sessions, download an attendance sheet for their sessions, and mark attendance for their event sessions. If they have credentials and a signature in their user profile, they will be listed on the certificates for the modules/sessions if a custom certificate is selected. ==Instructors are not limited by their hierarchy placement. In other words they can enroll and unenroll all Learners from modules, regardless of their hierarchy placement.==

Administrator: This user role has full access to every area of your organization's site. Administrators are not governed by the hierarchy, therefore they can view Users in all hierarchy levels/folders. Administrators can:

- Update overall site settings/customization.
- Create and edit training plans.
- Assign user roles.
- Create custom certificates.
- Create authored content.
- Author and edit Employee Feedback Surveys (if your organization subscribes to the Employee Feedback System).
- Run Employee Feedback Survey reports (if your organization subscribes to the Employee Feedback System).
- Assign Employee Feedback Surveys to Learners (if your organization subscribes to the Employee Feedback System).
- Run reports to learn more about the training performance of the Learners in the organization.
- Export reports as PDFs, Excel, or CSV files.
- Save reports to be accessed later.
- Automate saved reports to be sent to themselves and anyone else with Administrator or **Reporting Management Supervisor** access.
- Assign individual modules and training plans to Learners
- Unenroll Learners from modules and training plans.
- Add external training to a Learner's transcript.
- Change due dates for modules.
- They can mark Learner completions (based on module settings, for modules that are not included in the Relias Module Library)
- Create and Edit Users.