This is one of a series of Job Aids to make it easier for you to navigate the VSLO Application Service. To see a complete list of job aids, please visit our training page for institutions and students. If you have questions, please don't hesitate to contact our customer support team for assistance by calling (202) 478-9878 (8:00 am -6:00 pm ET), or by email.

Home and Host – Role Management

- Create New Role
- Search Role
- View/Edit Role
- Delete Role

	STEP	ACTION	Notes
1	From MAIN screen, click the *User Management* dropdown menu.	*User Management* dropdown displays • *Roles* • *Users*	Some MAIN screen options will vary for HOME or HOST institutions according to what is applicable to the user. Institutions that are both a Home and Host will show both HOME and HOST options. Based on the user's access to the software, some screens may not be available, and will not show in the dropdown menu. Users will only see screens to which they have access.
2	Click *Roles*	The VIEW ROLES screen appears.	
3	**Create New Role**		
4	Click on *+Create New Role* button on right side of screen.	The CREATE ROLE popup screen appears.	

	STEP	ACTION	Notes
5	Enter the name of the new role to be created in the *Role Name* field. Role name is limited to 50 Characters.		
6	Press TAB or click mouse to move cursor to the *Description* field.	Cursor moves *to Description* field, ready for entry	Pressing ENTER causes cursor to disappear.
7	Enter Description up to 200 characters.		Pressing enter allows multiple lines. This is optional.
8	Use your mouse to select the permissions and/or privileges that will be assigned to this role.	Checked boxes indicate permissions granted.	
9	When finished assigning permissions/privileges, click the *Create* button at the bottom of the CREATE ROLE popup screen.	You will be returned to the VIEW ROLES screen.	
10	Check to verify that the role just created displays on the list of roles.		Immediately after creating the role, the number of users and Invites should both be zero.
11	**Search Role**		
12	From MAIN screen, click the *User Management* dropdown menu.	*User Management* dropdown displays options *Roles* and *Users*.	
13	Click the *Roles* dropdown option.	VISITING STUDENT LEARNING OPPORTUNITIES (VSLO)/My Students/Roles screen appears.	

	STEP	ACTION	Notes
14	You can search for a Role by scrolling the list or using the filters. Type the criteria in the *Enter search criteria here* box. The list will then show just the criteria you requested.	Search criteria filters: • Role Name • Description	To return to the complete list, click the *X* on the *Enter search criteria here* box. The complete list will return.
15	**View Edit Role**		
16	From MAIN screen, click *User Management* dropdown.	*User Management* dropdown displays options *Roles* and *Users*.	
17	Click *Roles*	The VIEW ROLES screen appears.	
18	Identify which role you wish to edit.		
19	Click on the EDIT button for that role	The EDIT ROLE popup screen appears.	Edit button is on the far right of the screen, just above the Remove button.
20	Using your cursor, make changes to permissions or privileges granted to this role	Checkbox boxes to change status. Checked boxes indicate permissions granted.	
21	When finished making changes, click the *Update* button on the bottom of the screen.	Update action icon displays. Returned to the VIEW ROLES screen.	There will be a banner displayed briefly across the top of the screen stating *Role Was Successfully Saved.*
22	**Delete a Role**		
23	From MAIN screen, click *User Management* dropdown.	*User Management* dropdown displays options *Roles* and *Users*.	
24	Click *Roles*	The VIEW ROLES screen appears.	
25	Identify which role you wish to delete.		Only Roles with 0 users and 0 invites can be deleted. If a Role has assigned users or outstanding invitations, they cannot be removed.

	STEP	ACTION	Notes
26	Click on the *Remove* button for that role.	The REMOVE ROLE popup screen appears.	
27	Click the *Yes I'm Sure* button.	The role will be removed.	