How to Use Custom Roles in Alchemer Pulse

Learn how to create, assign, remove or edit a custom role in Alchemer Pulse.

Introduction

User roles determine which areas of the product your team members can view and edit within your account, such as the ability to create new dashboards, generate reports, or add new custom themes.

Admin, Editor, and Reader roles will always be available in your Alchemer Pulse account. You can duplicate them but you cannot edit or change their access to specific functionalities. New users will receive an Editor role by default.

Custom roles are user roles created by someone within your organisation. You can create your own role and define which functionality access that role will have. Once created, you can edit, duplicate or remove the custom role.

Creating a new custom role:

You can create a new role either by starting from scratch or by duplicating an existing role.

Starting from scratch:

1. Navigate to the Settings page, click on the User Management section and then on the "Roles" tab.

2. Click on the "Add New" option (if you cannot see this, you may not have the Admin rights).

3. You can name the new role using the top text input box.

Duplicating an existing role:

1. Choose an existing role you want to duplicate, this can be any user role that already exists in your account.

2. Click on the three dots of that role and select "Duplicate."

Assigning permissions to the role:

Permissions are grouped based on the function they relate to. Some permissions are nested in an additive manner, meaning you cannot assign bigger access without assigning a lower one.

Example - User Management

There are three major permissions: view, add and manage.

You cannot give someone the right to *manage* dashboards without allowing them to *view* them or *add* new ones.

Simply select the permissions you want to apply to the role and then click on “Save Permissions.”

Applying a custom role to a user:

You can apply a role to another user either on the Roles or Users pages.

Users page → Select the user you want to assign a role to, click on their current role and choose the new role from the drop-down menu.

Roles page → Choose the role you want to apply, click on the “Users” dropdown, and select the user to whom you want to assign the role. They will automatically be unassigned from their previous role.

Editing a custom role:

You can rename or change the permissions within an existing custom role by clicking on the three dots of the chosen role from the Roles page and selecting “Edit.”

Deleting a custom role:

You can delete an existing custom role by clicking on the three dots of the chosen role from the Roles page and selecting “Remove.”

Please note - if there are any users with this role applied, they will automatically be assigned an Editor role.

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