

Assign Roles

User roles, also referred to as user permissions, designates what data the user is able to view, enter, and/or edit in SCRIBE. Confirm with the grant's data manager or director which permissions the user should have.

1. In a user's profile, click on the **Roles** tab.

SCRIBE Home > User Management > User Details

Name: Allie Sheldon

User Details

Roles

This tab allows you to manage the roles assigned to this user. Use the tree on the left to View the roles assigned at each level. Roles can be assigned at the Instance, District, and School levels.

Role Summary

System Roles

☒ GEAR UP Demo_Current

☒ Portland Public Schools

Jefferson High School

Madison High School

Roosevelt High School

☒ Testing

CourseCompletion_Test

☒ Training District

Bayside Middle School

College

DeGrassi Junior High

West Beverly High School

William McKinley High School

Role Summary

System Level Roles

No roles have been assigned to this user at the system level.

Instance Level Roles

No roles have been assigned to this user at the instance level.

District Level Roles

No roles have been assigned to this user for this district.

School Level Roles

No roles have been assigned to this user for this school.

2. Click the **level of permission** the user needs (e.g., Instance-, District- or School-level).
3. Existing roles already assigned to that user at that level will be displayed, if any.

Click **Edit Roles**.

4. Check the box(es) next to the appropriate permission(s).
5. Click **Save**.

Permission Levels:

- a. System-level - reserved for Xcalibur employees only
- b. Instance-level - allows a user to view, enter, export and/or edit data for all districts and schools in the instance. If a user has instance-level permissions, they do not need to be given district- or school-level permissions.
- c. District-level - allows a user to view, enter, export and/or edit data for that district and all school(s) in that district. If a user has district-level permissions, they do not need to be given school-level permissions for any school in that district. Users can be given district-level permissions for multiple districts if needed.
- d. School-level - allows a user to view, enter, export and or/edit data for a school. A user can be given school-level permissions for multiple schools in the same or different districts if needed.

Tips & Troubleshooting:

1. Typically, do not assign permissions that allow the user to delete any data unless explicitly requested by the data manager or director of the grant. This is a fail-safe to make sure data is not accidentally deleted or edited.
2. Typically, do not assign user management permissions. This is a fail-safe to make sure all users retain the permissions they were assigned originally and do not gain access to protected data or permissions to delete/edit data. Some grants have designated one staff member who has user management permissions and is responsible for adding new users to SCRIBE in which case only that person should have user management permissions.
3. It might be useful to assign additional permissions to a user for a limited period of time. For instance, if a user needs to edit a group of students, delete or edit services, add a group of new users to SCRIBE, etc. Ask them to notify you when they are finished so you can remove the added permissions from their account.
4. Vendor-level permissions allow the user to upload and download attachments at the instance level only. They cannot view any other data in SCRIBE. Vendor-level permissions are typically assigned to users who work for a GEAR UP vendor or partner (e.g., a tutoring service, texting service, etc.) and typically attach documents like attendance rosters and other service participation documentation or match data.
5. Sometimes a requestor will ask for a user to have the same permissions as another user in their instance. The Role Summary under the Role tab is an easy way to see what permissions the existing user has and that the new user should also have. Take a screenshot of that person's permissions so you can reference it when you assign the new user the same permissions.

Roles Assigned in SCRIBE

Role	Description	Level	Recommendation	Note
Add District	Allows a user to add and edit districts.	I	Do not assign	
Add Edit Services	Allows user to add and edit services	I, D, S		
Add School	Allows a user to add and edit schools	I, D	Do not assign	
Add/Edit College Enrollment	Allows a user to add and edit college enrollment. College Enrollment module must be set up in SCRIBE.	I, D, S		
Add/Edit Course	Allows a user to add and edit courses	I, D, S		
Add/Edit Match Data	Allows a user to view, add and edit match data. Match Tracking module must be set up in SCRIBE.	I		User must also have view staff permissions to view related match data

Add/Edit Partner	Allows a user to add and edit partners.	I		User must have view match data permissions
Add/Edit Service Template	Allows a user to add and edit service templates	I		
Add/Edit Staff	Allows a user to add and edit staff. Match Module must be set up in SCRIBE **This is a different permission than add/edit teacher	I		User must have view match data permissions
Add/Edit Standardized Test	Allows a user to add and edit standardized tests **This is a different permission than allows for users to enter standardized test scores	I	Assign sparingly	
Add/Edit Student	Allows a user to add and edit students.	I, D, S		
Add/Edit Student Group	Allows a user to add and edit student groups.	I, D, S		
Add/Edit Teacher	Allows a user to add and edit staff/teachers	I, D, S		
Add/Edit/Delete Participation	Allows a user to add, edit and delete participation	I, D, S		
Delete Attachment	Allows a user to delete attachment uploaded by anyone	I, D, S		
Delete College Enrollment	Allows a user to delete college enrollment. College Enrollment module must be set up in SCRIBE.	I, D, S	Assign sparingly	
Delete Course	Allows a user to delete courses.	I, D, S	Assign sparingly	
Delete District	Allows a user to delete districts.	I	Do not assign	

Delete Match Data	Allows a user to delete match data. Match Tracking module must be set up in SCRIBE.	I	Assign sparingly	User must have view match data permissions
Delete Partner	Allows a user to delete partners. Match Tracking module must be set up in SCRIBE.	I	Assign sparingly	User must have view match data permissions
Delete School	Allows a user to delete schools.	I, D	Do not assign	
Delete Service	Allows a user to delete services.	I, D, S	Assign sparingly	
Delete Service Template	Allows a user to delete service templates.	I		
Delete Staff	Allows a user to delete staff. Match Tracking module must be set up in SCRIBE.	I	Assign sparingly	
Delete Standardized Test	Allows a user to delete standardized tests **This is a separate permission than allows for users to delete standardized test scores		Assign sparingly	
Delete Student	Allows a user to delete students.	I, D, S	Do not assign	
Delete Teacher	Allows a user to delete teachers.	I, D, S	Do not assign	
Download Attachment	Allows a user to download attachments uploaded by any user.	I, D, S		
Edit District	Allows a user to edit district information.	I, D	Do not assign	
Edit School	Allows a user to edit school information.	I, D, S	Do not assign	
Edit Student	Allows a user to edit student information.	I, D, S	Do not assign	
Expense Report Approval Level - GEAR UP Director	Allows a user to approve expense reports at the director level.	I, D, S	Do not assign unless to director	

Expense Report Approval Level - Regional Facilitator	Allows a user to approve expense reports at the regional facilitator level.	I, D, S	Do not assign unless to regional facilitator	
Expense Report Approval Level - University	Allows a user to approve expense reports at the university level.	I, D, S	Do not assign unless to university employee	
Importer	Allows a user to import data.	I, D, S		
Instance Admin	Allows a user to access instance administration features.	I	Do not assign	
Manage Scholarship Applications	Allows a user to view, edit and delete student scholarship applications. Scholarship module must be set up in SCRIBE.			User must have view school and view sensitive information permission
Manage Scholarship Institutions	Allows a user to view, edit and delete scholarship institutions. Scholarship module must be set up in SCRIBE.	I		
Manage Scholarship Lists	Allows a user to view, edit and delete scholarship lists. Scholarship module must be set up in SCRIBE.	I		
Manage Scholarship Payments	Allows a user to view, edit and delete scholarship payments. Scholarship module must be set up in SCRIBE.	I		User must have view school and view sensitive information permission
Manage Scholarships	Allows a user to view, edit and delete scholarships. Scholarship module must be set up in SCRIBE.	I		

Manage Service Providers	Allows a user to view, edit and delete service providers.	I		
Manage Service Provider Types	Allows a user to view, edit and delete service provider types.	I		
Manage Standard Courses	Allows a user to view, edit and delete standard courses. **This is a separate permission than allows for users to add, edit or delete courses	I	Assign sparingly	
Manage Student Pathways	Allows a user to view, edit and delete student pathways.	I		
Person Notes Manager	Allows a user to edit and delete notes that have been created by other users.	I, D, S		
Student Note Taker Only	Allows a user to add notes for a student.	I, D, S		
Submit Expense Report	Allows a user to submit an expense report.	I, D, S		
Teacher Note Taker Only	Allows a user to add notes for a teacher.	I, D, S		
Upload Attachment	Allows a user to upload an attachment.	I, D, S		User will also need download attachment permission if needed
User Management	Allows a user to add, edit and delete/lock users.	I	Do not assign	
Vendor Attachment Access	Allows a user to upload, edit, download and delete vendor only attachments.	I, D, S, V	Assign to vendors	
View Match Tracking	Allows a user to view match tracking. Match Tracking module must be set up in SCRIBE.	I, D		

View School	Allows a user to view school(s) and any data associated with school(s).	I, D, S		
View Sensitive Information	Allows a user to view sensitive information about students.	I, D, S		
View SSN	Allows a user to see students' social security number.	I, D	Assign sparingly	User must have view school and view sensitive information permissions.
View Staff	Allows a user to view staff-related data. Match Tracking module must be set up in SCRIBE.	I, D		User must have view match data permission.

I = Instance, D = District, S = School, V = Vendor