PLURALSIGHT | HELP CENTER

Setting up roles

Tags: Flow

Flow's roles and permissions options determine what users can view and do within Flow. Learn more about permissions.

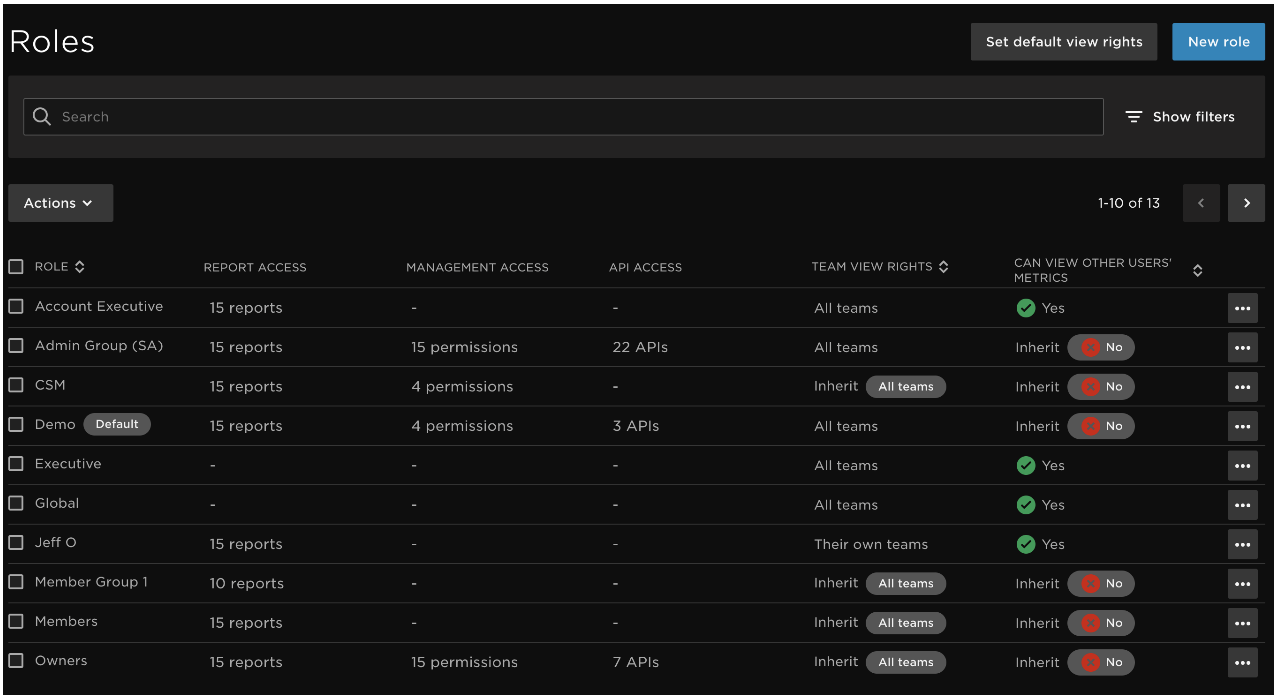
Who can use this?

Core	Plus
✓	✓

Setting up Roles

To view your organization's current roles:

1. Click **Settings** in Flow's top navigation bar.
2. In the left navigation under User Management, click **Role management**.



ROLE	REPORT ACCESS	MANAGEMENT ACCESS	API ACCESS	TEAM VIEW RIGHTS	CAN VIEW OTHER USERS' METRICS
Account Executive	15 reports	-	-	All teams	Yes
Admin Group (SA)	15 reports	15 permissions	22 APIs	All teams	Inherit No
CSM	15 reports	4 permissions	-	Inherit All teams	Inherit No
Demo Default	15 reports	4 permissions	3 APIs	All teams	Inherit No
Executive	-	-	-	All teams	Yes
Global	-	-	-	All teams	Yes
Jeff O	15 reports	-	-	Their own teams	Yes
Member Group 1	10 reports	-	-	Inherit All teams	Inherit No
Members	15 reports	-	-	Inherit All teams	Inherit No
Owners	15 reports	15 permissions	7 APIs	Inherit All teams	Inherit No

When you first set up Flow, Flow creates four default roles. Use these to get started and customize later.

These are Flow's default roles:

- **Admin:** Admins can view all teams' data and team members' data. This role is for users that need access to all parts of Flow. We recommend giving this role to only one or two people.
- **Executive:** Executives can see all teams' data but not team members' data. We recommend giving this role to users interested in organization level metrics like Investment profile. Executives also receive email

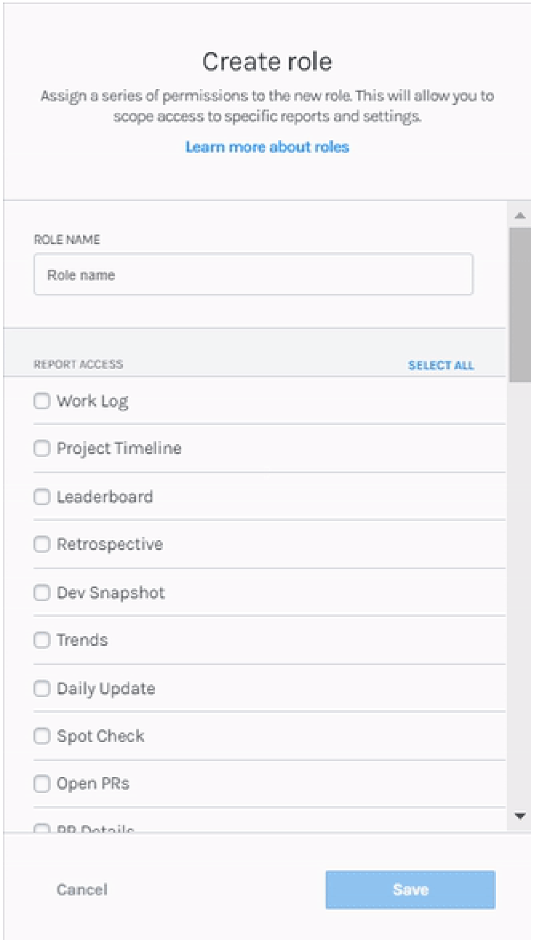
reports.

- **Team lead:** Team leads can see only their own teams' data and their members' data. The team lead role is for team managers who can see all reports and have permissions needed to manage their users and teams.
- **Team member:** Team members can see their own teams' data, but not their members' data. They can see all reports, but can't change configuration.

You can set up your own default and edit any of the existing roles in your account.

To add a new role:

1. Click **New Role**.
2. In the Create role modal, give your new role a name.
3. Give users with this role access to view and manage specific reports. In the example below, anyone with the Engineer role only sees the selected reports and nothing else.



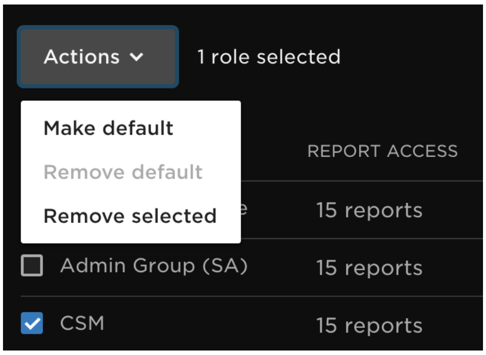
4. Click **Save.**

You can designate a role as the default role for invitees. Flow assigns the default role to any new user added to your account.

> **Tip:** If you have multiple default roles set, each new user will automatically be given all default roles.

To make a role a default role:

1. Click the box next to the role you want to designate as the default.
2. In the Actions dropdown, click **Make default**.



3. Click **Yes, make default** to confirm your default role. That role now appears as your default role in the roles list.

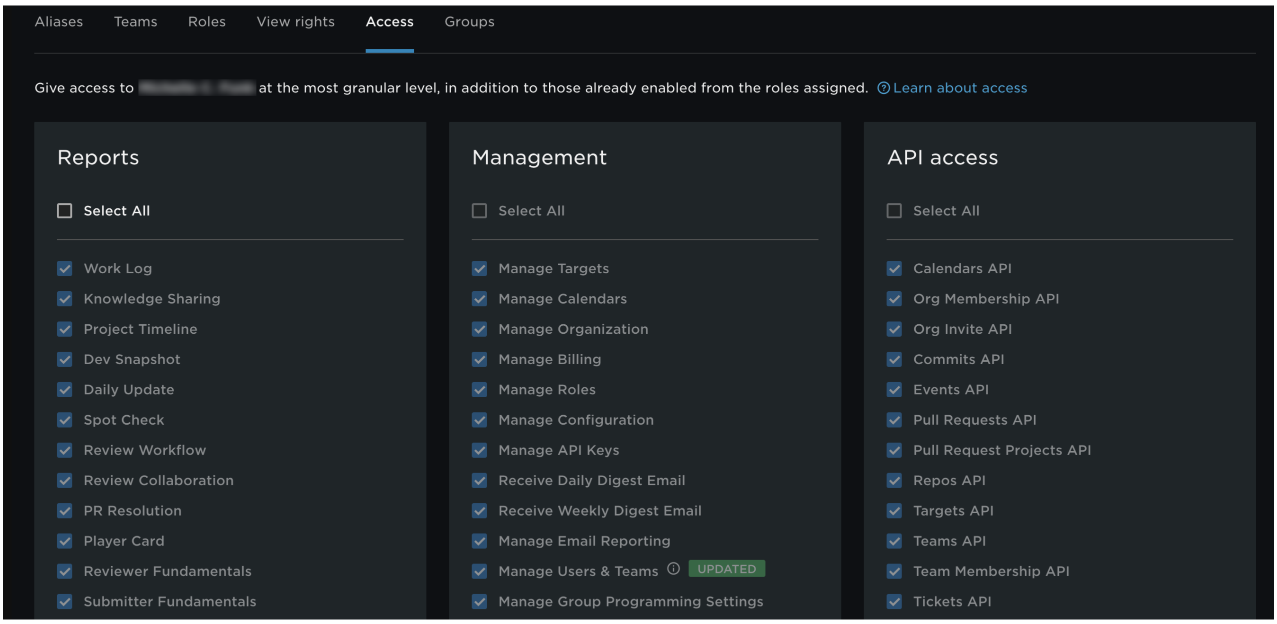
What different permissions can I grant users?

In addition granting individual users access to specific reports, grant users specific administrative permissions. Learn more about Administration permissions.

Can I give a user a role and grant them additional permissions?

A user automatically inherits all permissions from the role you assign them, but you also can grant individual users additional permissions.

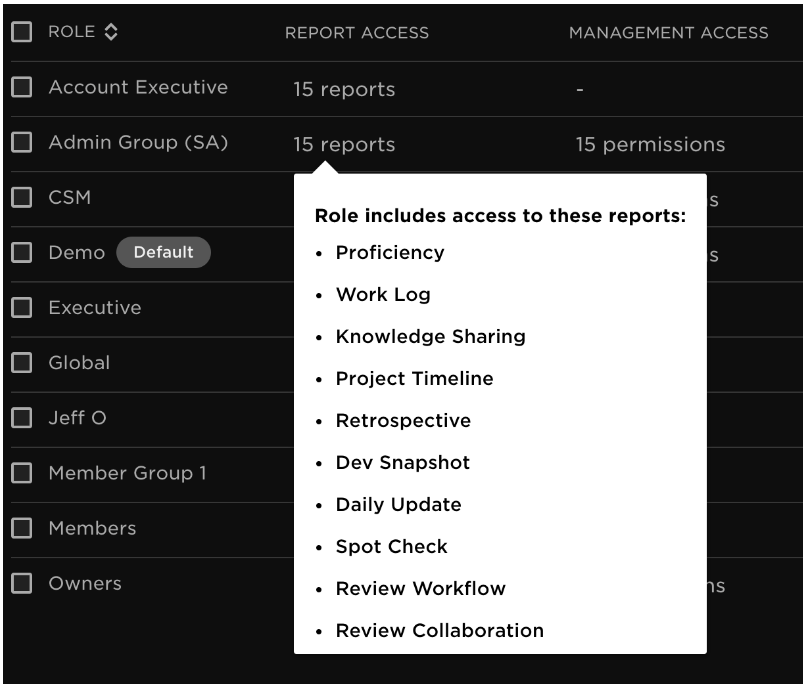
> **Note:** To permanently grant a user additional permissions, assign those permissions to the user's role, not the user. Granting the permissions to the user is temporary and those permissions will not be available the next time they log in.



How do I see what permissions are granted to a role?

To view the accessible reports and permissions associated with a role:

1. Click **Settings** in Flow's top navigation bar.
2. In the left navigation under User Management, click **Role management**.
3. For any report, hover over its result in the **Report Access**, **Management Access**, or **API Access** columns to view a detailed list of what's accessible to that role.



If you need help, please email support@pluralsight.com for 24/7 assistance.