

How to Use Roles

Users are granted access rights to the Durell Portal by assigning them a Role. Roles define broad types of users and this guide shows you how to edit the default Roles or create your own custom Roles.

We strongly **recommend using Chrome** instead of Firefox, Safari or any other browser to use all the features listed below.

Follow the provided link for access

Let's begin by logging into your Durell Portal, using the link sent to you or your office manager.

If this is your first time logging in, the link will take you to create a new password.

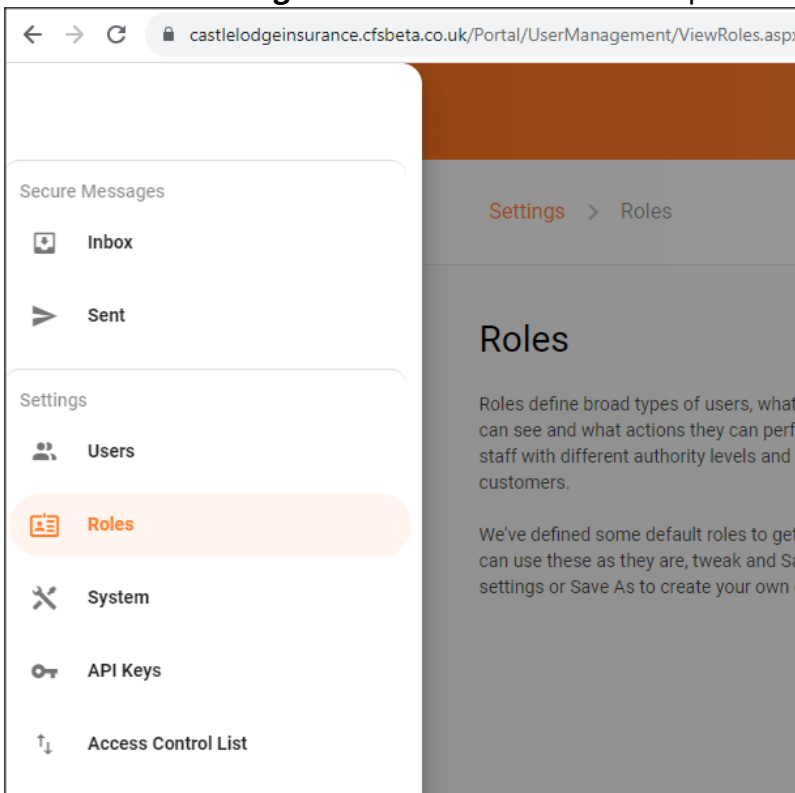
Where to setup roles

Once you're logged into the Durell Portal.


- Click on the  **Menu** button in the top left



- Under the  **Settings** section click the  **Roles** option







Roles section

You will be taken to the main page for  **Roles**. It features a brief description of what Roles are and then a panel which shows the default Roles you get with the system.

Roles

Roles define broad types of users, what modules they can see and what actions they can perform. For example staff with different authority levels and crucially your end customers.

We've defined some default roles to get you started. You can use these as they are, tweak and Save the default settings or Save As to create your own custom roles.

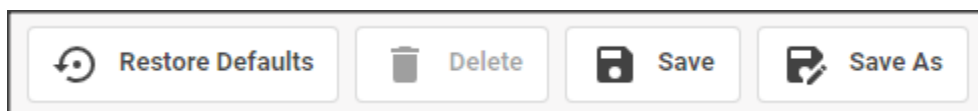
Name	Access Level	Assigned Users
<div style="background-color: #28a745; color: white; padding: 2px; font-weight: bold; font-size: 0.8em;">DEFAULT</div> Admin Admins have access to system configuration such as changing logos, colour themes and assigning users, MI and reporting functionality and can also perform day to day tasks within the system such as sending messages to customers and creating new customers and policies. Users with the Admin role must adhere to strict password policies and have 2FA enabled to ensure the protection of your system and customer data.		5
<div style="background-color: #28a745; color: white; padding: 2px; font-weight: bold; font-size: 0.8em;">DEFAULT</div> User This role is designed for staff members who perform day to day tasks within the system such as sending messages to customers and creating new customers and policies. Users must adhere to strict password policies and have 2FA enabled to ensure the protection of customer data.		0
<div style="background-color: #28a745; color: white; padding: 2px; font-weight: bold; font-size: 0.8em;">DEFAULT</div> Customer This role is designed for end-customers who will use your system to view their policies, documents and use the secure messaging facility. We strongly recommend you review these settings carefully, including creating a test customer so you can check how your customers will experience your portal. Strong security is advisable but not enforced - the decision is left to the customer as to how strong to make their password and whether or not they enable 2FA on their account. We recommend you communicate this to your customers when they are provided a login to the portal.		2
<div style="background-color: #28a745; color: white; padding: 2px; font-weight: bold; font-size: 0.8em;">DEFAULT</div> Account Only This role permits very basic access to the Durell Portal, the only visible module is the account details page.		0

Access Level / Assigned Users

The column on the right side of the panel **Access Level** displays an indication of how elevated that Role's access is, as well as how many users are currently assigned that Role under **Assigned Users**.

Reviewing and Editing Roles

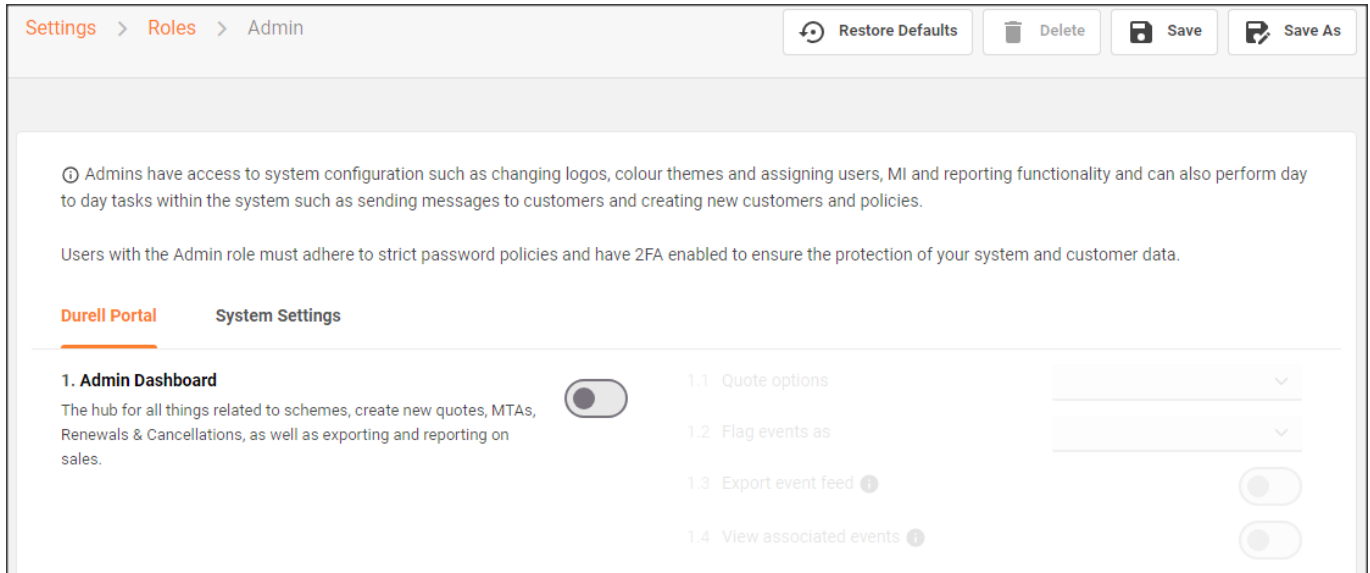
- To open a Role to review its settings, click on its name or any part of its box in the list of Roles.
- After opening a Role you'll see some important options in the top right of the screen:



- Any changes you make to a Role are saved when you click **Save**;
- Clicking **Save As** will create and save a new **Custom** Role, i.e. specific to your portal;
- After making changes to a default Role you can click **Restore Defaults** to revert back to the original settings.

- **Custom Roles** can be deleted by clicking **Delete**.

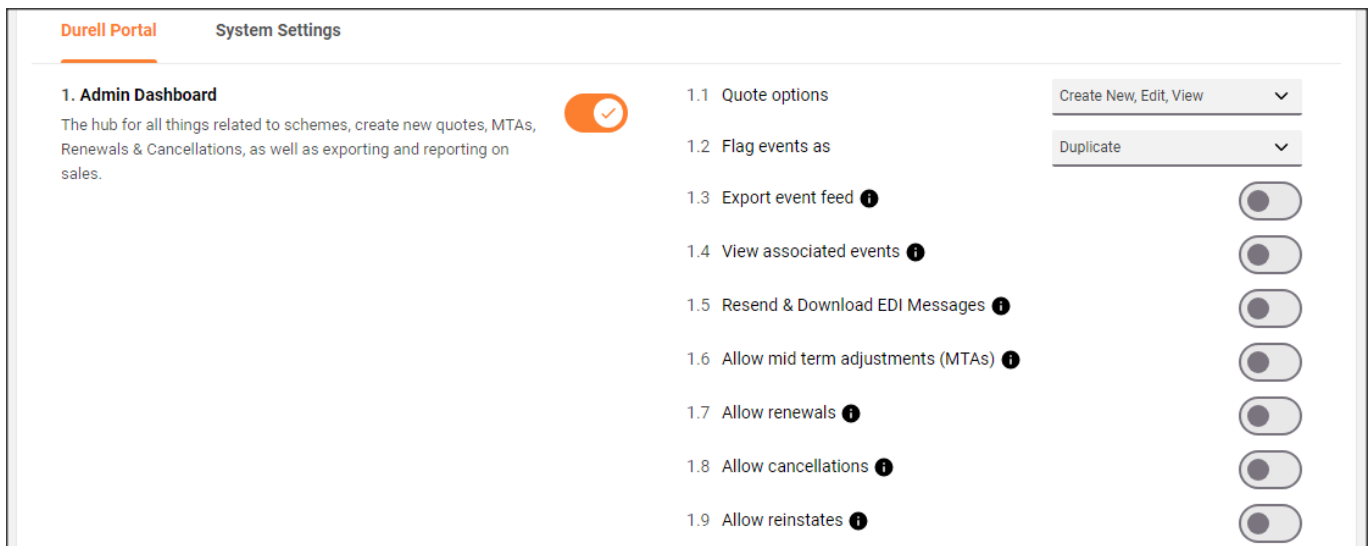
There are tabbed sections of settings for each Role, e.g. **Durell Portal** and **System Settings**. Click the tab to switch to that section.



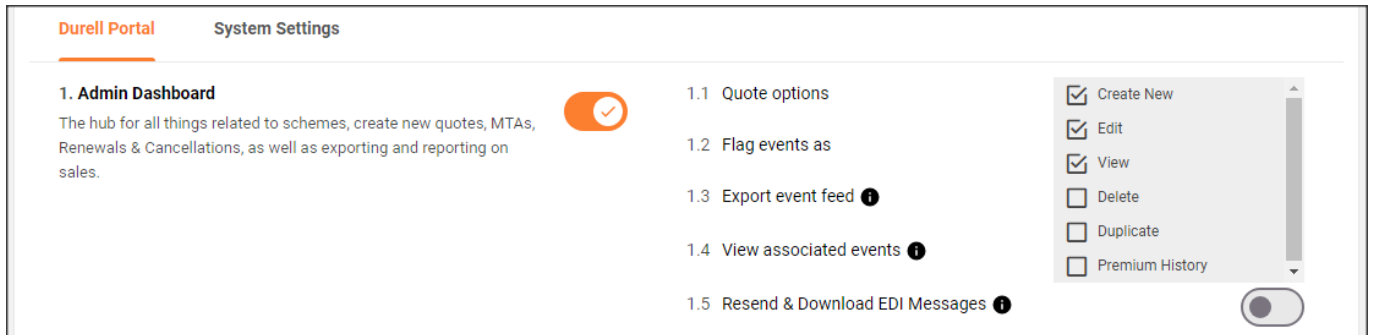
Review the individual access rights and set each one as you require. If any of the access rights are unclear please try them out with a test custom Role and user, or if stuck, please contact our Support team for help.

Each access right is numbered and any sub-options for it are also numbered incrementally.

Access rights are granted by using the toggle button alongside them – toggled / on the right (which will feature your colour branding and the tick) means the Role has been granted the access right; untoggled / on the left means it has not.



For any access right where a selection needs to be made from a list of options you will see a drop-down allowing you to select an option by clicking the appropriate tickbox.



Where an access rights shows an info marker you can hover your cursor over the marker to see some help text about that access right.

