UPDATING USER ROLES

User roles within an assigned school may need to be updated to account for employment changes, intra-school transfers, or rotation of department chairs.

PLEASE NOTE: As a CM Admin, you will only be able to update information/roles within your designated school/division.

1. To add a Member to a role, click +
   a. The Members box will appear listing all current members
   b. If a new member needs to be added, click + to enter the PennKey in lower case ONLY

   NOTE: Entering a PennKey with any capital letters will cause the associated workflow step to fail, no notification will be sent and the proposal will get stuck at that step

2. To remove a Member, highlight the role and click

3. To reorder the workflow order, highlight a role and click
   a. The first Member listed will receive an email notification when a proposal is assigned to that role
   b. To ensure ALL Members in a role receive email notifications, type “all” into the Email field as shown above
   c. To ensure MULTIPLE, but Not All, Members in a role receive notifications, enter the desired members’ email addresses, with each email address separated by a “,”

When to Submit a JIRA Ticket:
- Need to change who is the CM Administrator for a School
- Need to add a newly created role to a School’s workflow
- Need to delete a role from a School’s workflow
- Need to create, change or delete the workflow for a School