Draggin' Role™

User Guide

Setup:

Grant access to users by allowing their profile to see the "Roles" tab. This can be done during installation, or after by editing the tab settings for the profile(s) you wish to grant access to. That's it! Draggin' Role inherits security settings you may already have in place for delegated administrators… just allow them to see the tab, and they can use it to modify only their assigned users.

The Basics:

- Access Draggin' Role via the "Roles" web tab.
- Click a role name to display the users assigned to that role.
- Click a field in the "Currently Displaying" section to sort users by that field.
- Drag and drop users using the green 'person' icons:
- Drag and drop roles using the orange 'arrow' icons:
- Click the "Customize" button to launch the customization wizard.

Advanced Tips:

- Use the "Refresh" button anytime you add, edit or delete roles to grab the latest info from your hierarchy *(note: all users are hidden during a refresh).* This happens automatically when dragging and dropping roles.
- To refresh the users showing up in a particular role, simply click the role name twice to hide and re-show the users. This happens automatically when dragging and dropping users.
- Keep the number of fields being displayed to a minimum, the reason for this is two-fold:
  - Too many fields may slow performance.
  - When fields run out of room they wrap, and may not look as nice.
- (For larger hierarchies) Use the "Top Role" setting in the customization wizard to hone in on the part of your hierarchy while you work, fewer roles displayed will increase performance speed.
- Make sure you have cookies enabled in your browser settings, this way Draggin' Role will remember everything you choose in the customization wizard, even if you logout or close the browser entirely.
- Do not attempt to eat Draggin' Role.