

## Role/Group Basics

WakeID Portal Roles are commonly known as groups. Roles/groups in the WakeID Portal control groups in other applications (e.g. a staff email distribution list).

- Membership managers can **manually** add and remove people to a role/group.
- Certain role/group membership can be **automated** by Technology Services (e.g. all school staff) by contacting the WCPSS Help Desk.
- Changes to a role/group membership in the WakeID Portal is reflected in its assigned application (e.g. email distribution lists).
- Roles/groups can have **multiple membership managers**. This allows for a backup manager to be available in the event the primary manager is not.

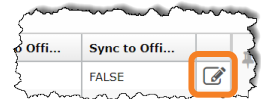
## Add Role/Group Member

1. Using **Google Chrome** or **Firefox**, visit <http://wakeid.wcpss.net> and log into WakeID.



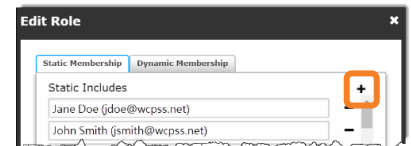
2. Click **Roles**.

3. Click **Edit Role** icon  to far right of **role/group** you want to manage.

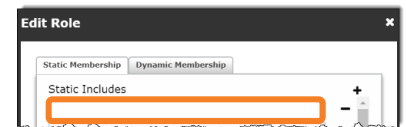


4. In **Static Membership** tab, click **+** to add a member.

**NOTE:** Disregard the Dynamic Membership tab. This is managed by Technology Services.



5. Click in **blank field**.



6. Enter WakeID, complete first name or complete last name in **search field**.

**TIP:** Search by WakeID (e.g. jsmith4) to ensure you are adding correct person. Locate WakeID in WakeConnect staff directory.



7. Click .



8. Click **person** you want to add.

John	Smith	jesmith4@students.wcps...
John	Smith	jsmith4@wcpss.net
John	Smith	jsmith6@wcpss.net

9. Click **Select**.

10. Click **Preview Membership** to verify changes.

- **Status** column will show **Add Pending** for users just added to the role/group.
- Click **Status** column header to sort by status. This is useful for roles/groups with large memberships.

User	Status
[Redacted]	Member
[Redacted]	Member
[Redacted]	Add Pending
[Redacted]	Member

11. Click **Close**.

12. Click **Save**.

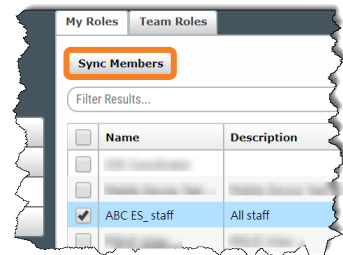
- New members will **NOT** be added unless you click save.
- Status will now show **Synchronization Needed**.

<input type="checkbox"/>	0565 Testers		Distribution List	Mon Aug 21 20...	Current
<input type="checkbox"/>	ABC ES_staff	All staff	Distribution List	Tue Jan 24 2017	Synchronization Needed
<input type="checkbox"/>	School Messenger	School Messenger	Distribution List	Jan 24 2017	Current

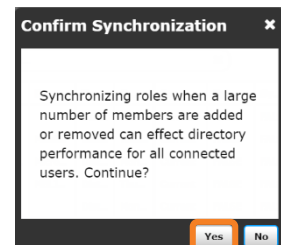
13. Click **group name** to select.

- Box in front of group will become checked.

14. Click **Sync Members**.



15. Click **Yes**.




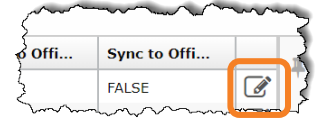
## Remove Role/Group Member


1. Using **Google Chrome** or **Firefox**, visit <http://wakeid.wcpss.net> and log into WakeID.

2. Click **Roles**.

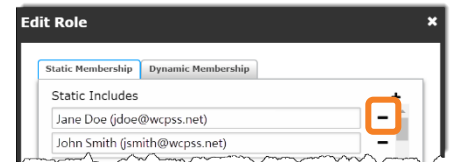


3. Click **Edit Role** icon  to the far right of the **role/group** you want to manage.



4. In **Static Includes** section, click  to the right of the member to remove.

- Member will be removed from view without warning.
- Only one member can be selected at a time.
- Members are listed in alphabetical order by first name.



5. Click **Preview Membership** to verify changes.

- **Status** column will show **Removal Pending** for users just removed from the group.
- Click **Status** column header to sort by status. This is useful for roles/groups with large memberships.



6. Click **Close**.

7. Click **Save**.

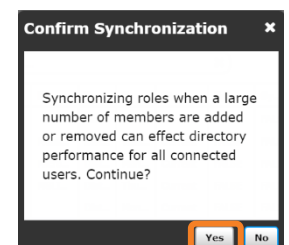
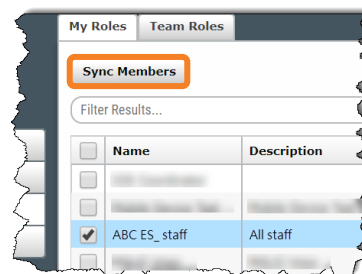
- Member(s) will **NOT** be removed unless you click save.
- Status will now show **Synchronization Needed**.

Role/Group	Description	Last Sync	Status
0365 Testers	Distribution List	Mon Aug 21 20...	Current
ABC ES_staff	All staff	Tue Jan 24 2017	Synchronization Needed
School Messenger	School Messenger	Tue Jan 24 2017	Current

8. Click **group name** to select.

- Box in front of group will become checked.

9. Click **Sync Members**.



10. Click **Yes**.



## Request a New Role/Group

New roles/groups must be requested via the **WCPSS Help Desk**.

Include the following information in the request:

1. What is the name of the new role/group?
2. Is the role/group manual or automated?
3. If automated, who are the types of users to be added? (e.g. all staff at ABC ES)