User Roles

User Roles in eScribe

eScribe provides five key user roles designed to clearly separate responsibilities, reduce role overlap, and minimize confusion. The images in the sidebar illustrate the functions and features available to each role based on its assigned permissions.

The most comprehensive access is provided through the Super Administrator and Administrator roles, which are typically responsible for system configuration and management. The remaining roles are designed to support specific tasks and responsibilities and are generally used in limited combination with other roles.

Permissions in eScribe are assigned at two levels:

1. **User-Level Permissions** – Determine the overall functions a user can access throughout the system. User level indicates access needs to be only granted within the user role only.
2. **Meeting Template Permissions** – Control what actions a user can perform within specific meeting types and workflows. Assigning access is a two-part process: User Role (Meeting Admin) + Template level access (Permissions)

Use the table below to assist with assigning permissions to new users.

Permission	Explanation
Administrator Roles	
Super Administrator	**<u>When to Assign This Role</u>** Assign the **Super Administrator** role only to users who are responsible for the overall administration and governance of the entire eScribe environment. This role provides full tenant-wide access and is intended for a very limited number of trusted system administrator. • Highest most comprehensive access • Access to all meetings open and closed by default. • Access to all attendees and user groups • Access to all Meeting Types • Access to all Administrative functions • Access all Documents (Draft and Approved) for all Meeting Type
Administrator	**<u>When to Assign the Role</u>**

(User Level + meeting Template)	An **Administrator** has many of the same management capabilities but is typically restricted to the Meeting Types and content assigned to them. This allows organizations to delegate administrative responsibilities while maintaining appropriate access controls. • Access to meetings where they have been granted access. When a user is assigned Administrator access in their user profile, they must also be assigned access to the Meeting Type(s) they need to see and/or manage upon login. • No immediate access to Closed Session • Access to all attendees and user groups • Access to all Administrative functions • Access all Documents (Draft and Approved) for the Meeting Type(s) they manage. i.e.: only seeing Council Meetings Documents • Access to all Approval Groups
Administrator + Visitor Access	**When to Assign This Role** This combination is ideal for users who: • Need administrative responsibilities for specific Meeting Types. • Occasionally require visibility into other meetings across the organization. • Support multiple committees or departments. • Need access to reference information without being granted full Super Administrator access.
Meeting Administrator Variations	
Meeting Administrator	**When to Assign This Role** Assign the **Meeting Administrator** role to users who are responsible for **managing and administering specific meetings, boards, committees, or councils within eScribe**. This role is intended for users who need to create meetings, manage meeting content, coordinate workflows, and oversee meeting-related processes. Step 1: User Level Permissions Select Meeting Administrator from the menu. Additionally, layer on any or all the following 4 roles in combination: • Visitor Access • Meeting Template Access • Attendee Group Access • Approval Group Access

	Step 2: Template level
	
	Meeting Administrators can be assigned the following functions if enabled for the meeting template:
	
	• Manage Meetings :allows user to manage existing meetings
	• Create Meetings: allows user to create new meetings
	• Manage Approvals displays all existing approval groups
	• Manage Tasks: Users can manager Tasks only associated to the templates where they have access.
	• View Draft Document: displays all Documents in draft
	• View Approved Documents: Displays all approved documents.
	  o Allows the user to move back to draft
	  o Allows Meeting Administrator to approve a workflow request pending

Meeting Admin + Enable Visitor Access	**When to Assign This Role** Assign **Meeting Administrator + Visitor Access** when a user needs to **manage specific meetings** while also requiring **read-only access to meetings, documents, or information outside of their assigned meetings**.
Meeting Admin + Templates	**When to Assign This Role** Assign **Meeting Administrator + Meeting Template Access** when a user is responsible for **configuring and maintaining meeting templates**, in addition to managing meetings.
Meeting Admin + Attendee Group	**When to Assign This Role** Assign **Meeting Administrator + Attendee Groups** Access when a user needs to manage meetings and maintain attendee groups used for those meetings. Cannot add, delete or user in eScribe
Meeting Admin + Approval Group	**When to Assign This Role** Assign **Meeting Administrator + Approval Groups Access** when a user needs to manage meetings and oversee agenda item review and approval workflows.
Non-Administrator Roles	

Contributor	**When to Assign This Role** Assign the **Contributor** role to users who are responsible for **creating, submitting, reviewing, or approving meeting content**, but do not need to administer meetings or manage system settings. The Contributor role is designed for report writers, department staff, and approvers who participate in the agenda preparation process Allows the user to create and edit Documents (Reports) • Allows the user the ability to start Approvals • Allows the user the ability to Approve and Delegate in an Approval Queue.
Contributor + Task Manager	**When to Assign This Role** Assign **Contributor + Task Manager** Access when a user needs to submit agenda content and documents while also managing tasks within eScribe.
Participant	**When to Assign This Role** Assign the **Participant** role to users who need to access meeting materials and actively participate in meetings but do not need to create content or manage meetings. This role is commonly assigned to elected officials, board members, committee members, and other meeting attendees. • Access to view published meetings where they are listed as attendees • Download Agenda and Minutes Packages for offline viewing • Optionally if enabled: Requesting to Speak, Voting and Annotations.
Visitor	**When to Assign This Role** The **Visitor** role is a read-only role designed for users who need to view meeting information but do not need to create, edit, approve, or manage content within eScribe. Visitors can access information that has been made available to them but cannot make changes to records or participate in administrative workflows.
Contributor + Participant	**When to Assign This Role** **Contributor + Participant** is the ideal combination for users who both **create content** and **participate in meetings**. Assign this combination when a user needs to: • Create, edit, and submit reports or documents • Participate in approval workflows

	• Access draft and approved documents (based on permissions) • Attend meetings and view published meeting materials • *Vote or participate in meeting proceedings (where applicable)* • Access participant-specific meeting information and records
Contributor +Visitor	**When to Assign This Role** **Contributor + Visitor** is a good fit for users who need to create and manage documents while also having access to meeting content that has been published for visitor viewing. This combination is commonly used for staff who prepare reports but are not formal meeting members or participants Assign this combination when a user needs to: • Create, edit, and submit reports or agenda-related documents. • Participate in approval workflows. • Access document libraries and shared resources. • *View published meeting materials as a visitor.* • Access meetings or records that have been made available through visitor access. • Stay informed about meeting outcomes without participating in meeting proceedings.
Contributor+ Participant + Visitor	**When to Assign This Role** Contributor + Visitor + Participant is the most flexible non-administrator combination. It is designed for users who need to create and manage meeting content, participate in meetings, and access meeting information available through Visitor access. This combination allows a user to work across both the content creation and meeting participation processes