

User Roles

When you begin to customize the system, think about the different types of users and how their role affects the access they need.

Agiloft users belong to Teams and Groups. Groups set the level of access to tables, records, and fields. Team settings affect other parts of the interface such as the color scheme, available views, and the default home page. Teams also define working groups of users and can receive emails that go to every member of the team.

Users in multiple groups receive the superset of those groups' access settings. Users can also belong to multiple teams, but must always have a Primary Team to set important defaults. For easier maintenance, we recommend keeping the number of groups relatively small.

Teams and Groups can be added or removed in the Employee table by [Roles](#). This allows users to add only Teams and Groups that they have permission to add. Roles also flag whether or not the Employee uses an assigned license.

The next section describes the [default groups](#).