

Standard operating procedure

Sample SOP for Northwind, a made-up company. Screenshots from a demo admin panel; email addresses blurred.

Document ID	NW-OPS-014	Version	1.1
Title	Set a user's role back to Viewer		
Effective date	1 October 2026	Owner	Nina Alvarez, Operations
Approved by	Sam Okafor, IT lead		

Purpose

Remove edit rights a colleague no longer needs after leaving the content team, so only current editors can change published content.

Scope

Use when	A team lead's ticket says a colleague has moved out of the content team and keeps their Northwind account.
Not for	Offboarding. Someone who leaves Northwind is deactivated, not set to Viewer; that has its own SOP.

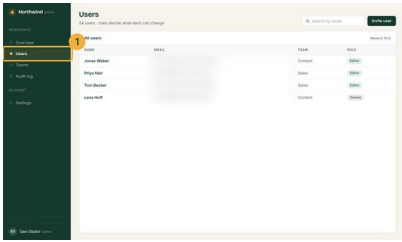
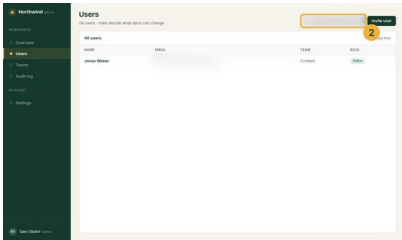
Roles and responsibilities

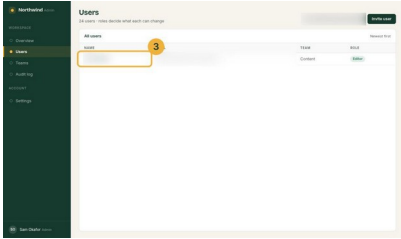
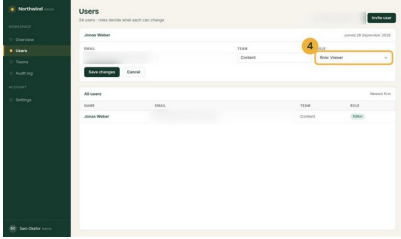
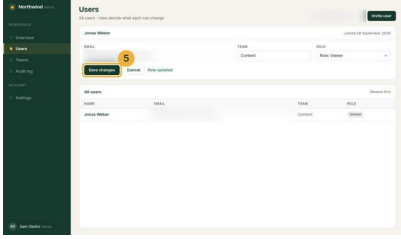
Operations (Admin role)	Carries out steps 1 to 5 and closes the ticket.
Team lead	Opens the ticket with the colleague's email and the new role.
Nina Alvarez, owner	Keeps this SOP correct; answers when it fails.

Prerequisites

- Admin role in the Northwind admin panel (shown under your name, bottom left).
- The team lead's ticket with the colleague's email, open beside the admin panel.

Steps

No.	Action	Screenshot	Result
1	In the menu on the left, click Users .		The Users page opens with the list of all users.
2	In Search by email , type the colleague's email from the ticket.		Only their row stays in the list, with Role Editor.

3	Click the colleague's name.		Their details open above the list, showing Role: Editor.
4	In Role , choose Role: Viewer .		The Role field shows Viewer; the list below still says Editor until you save.
5	Click Save changes .		"Role updated" appears beside the buttons.

Expected result

In **All users**, the colleague's row shows Role **Viewer**. Close the ticket with a note of the change.

If it fails

- The Role list does not change, or Save changes does nothing: your own account is not Admin. Ask Nina Alvarez.
- No row appears in step 2: check the email in the ticket for typos, then search by first name.

Revision history

Version	Date	Change	By
1.0	14 September 2026	First version	Nina Alvarez
1.1	1 October 2026	Step 5: button renamed from "Save" to "Save changes" after an app update; screenshot replaced	Nina Alvarez