

WardWalk Guide: Understand User Roles

Step-by-step support for campaign users

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Best for	All users
Guide number	03.2
Keywords	roles, permissions, volunteer, core leadership, admin, access level

Who This Guide Is For

This guide is for all users who need to complete this WardWalk task.

Explains the purpose of Volunteer, Core Leadership, and Admin access.

What You Will Learn

- Why WardWalk uses roles
- Volunteer access
- Core Leadership access
- Admin access
- Choosing the right role
- Least-access best practice

Before You Begin

- Use the email address approved for your campaign.
- Use a current browser and a stable internet connection.
- Open the WardWalk app link provided in your setup or invitation email.
- Confirm you have Admin access before managing users or setup items.

Step-By-Step Instructions

1. Why WardWalk uses roles

Follow the on-screen WardWalk controls for why wardwalk uses roles. Pause and ask your campaign Admin if the task affects users, voter data, exports, or campaign setup.

2. Volunteer access

Volunteers usually see field tools such as map access, walk lists, visit logging, and role-approved resources.

3. Core Leadership access

Core Leadership users usually have volunteer tools plus progress review, action lists, exports, documents, calendar, and coordination tools.

4. Admin access

Admin users manage setup, campaign profile, boundaries, imports, users, documents, resources, and higher-risk configuration.

5. Choosing the right role

Choose the lowest access level that gives the person the tools they need. Use Admin only for people who truly manage setup, imports, users, or exports.

6. Least-access best practice

Follow the on-screen WardWalk controls for least-access best practice. Pause and ask your campaign Admin if the task affects users, voter data, exports, or campaign setup.

7. When to update a user's role

Find the user in Add/Manage Users, change the role, and save. Ask the user to sign out and back in if the change does not appear immediately.

Common Issues

- User cannot see tools: confirm role and ask them to sign out/in.
- Invite email failed: confirm email delivery settings and resend.
- Seat limit reached: upgrade package or remove inactive users first.

Related Guides

- 01.1 - Accept Your Invitation (wardwalk-01-accept-your-invitation.pdf)
- 01.2 - Sign In for the First Time (wardwalk-01-sign-in-first-time.pdf)
- 01.3 - Install WardWalk on iPhone or Android (wardwalk-01-install-on-phone.pdf)
- 01.4 - Understand Your User Access (wardwalk-01-understand-user-access.pdf)

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Still Need Help?

Visit www.wardwalk.ca/support or contact WardWalk Support through the Contact Us form. Please do not include sensitive voter-list data, resident notes, private campaign files, or exported data unless requested by WardWalk through an approved process.