role (migration step)

Source file: doc/eng-us/examples/migration-steps/role.md Last changed 2026-11-04
https://doc.exponential.earth/exphelp/viewer/examples/migration-steps/role.md

role

Creates, updates, ensures or deletes a role with its policies and limitations, or assigns it to users and user groups or takes it from them.

A step of a YAML migration with `type: role`. The class `expMigrationStepRole` (`kernel/classes/migration/steps/expmigrationsteprole.php`) is registered in `settings/migration.ini` `[StepSettings] StepTypeList[role]`.

Modes

`mode:` is one of `create`, `update`, `ensure`, `delete`, `assign`, `unassign`; every step names one.

Keys

Key	Type	Modes	Default	What it is
`role`	`identifier` (role)	update, delete, assign, unassign		the role: its name or id
`name`	`string`	create, update, ensure		the name of the role; ensure finds the role by it (update: a new name)
`policies`	`list`	create, ensure		the policies, each a map: module, function (* for all) and limitations (identifier => list of values); ensure adds those the role does not have
`add_policies`	`list`	update		policies to add, as in policies:
`remove_policies`	`list`	update		policies to remove, each a map: module and function (without function: every policy of the module)
`users`	`list`	assign, unassign		the users: logins, ids or remote:<remote id>
`groups`	`list`	assign, unassign		the user groups (or other objects): object identifiers
`subtree`	`identifier` (node)	assign, unassign		the assignment is limited to the subtree of this node
`section`	`identifier` (section)	assign, unassign		the assignment is limited to this section
`missing`	`string`: `fail`, `skip`	update, delete, assign, unassign	`"fail"`	what happens when the role is not there: fail (the default) or skip

Besides these, every step takes the keys of the engine: `type`, `mode`, `if`, `references`, `environments`, `engines` and `comment` (the file format). A key of type `identifier` names a node, an object or another part of the installation by id, remote id, path or name (identifiers).

Values for references

`references: { <name>: <value> }` keeps a value of the step's result as `${ref.<name>}` for the steps and migrations after it:

Value	What it is
`role_id`	the id of the role
`name`	its name
`created`	true when the step created the role
`changed`	true when the step changed it (created, updated, deleted, assigned or unassigned)

Undoing

Some steps of this type undo themselves when their migration is rolled back without `down:` (the class says which); a migration with any other step of it needs `down:` or a rollback to its caption.

Caches it touches (cleared after the run): `user_info_cache`, `content`.

Example

YAML

```yaml
- type: role
  mode: ensure
  name: News editor
  policies:
    - { module: content, function: read }
    - { module: content, function: edit, limitations: { Class: [ news_article ], Subtree: [ "path
:news" ] } }
- type: role
  mode: assign
  role: News editor
  groups: [ "remote:news-editors" ]
  subtree: "path:news"
```

Related

- All step types
- YAML migration steps

Generated by `./console exp:help:examples` from `settings/migration.ini`, `kernel/classes/migration/steps/expmigrationsteprole.php`. Do not edit this page: change the source and generate again (how). Free documentation: GFDL 1.3 or later.

Exponential Copyright © 1998-2026 Exponential Foundation and 7x
Permission is granted to copy, distribute and/or modify this document under the terms of the GNU Free Documentation License, Version 1.3 or any later version published by the Free Software Foundation; with no Invariant Sections, no Front-Cover Texts, and no Back-Cover Texts. A copy of the license is included in the section entitled "GNU Free Documentation License".
This documentation is free documentation, licensed under the GNU Free Documentation License 1.3 or later:
https://www.gnu.org/licenses/fdl-1.3.html.