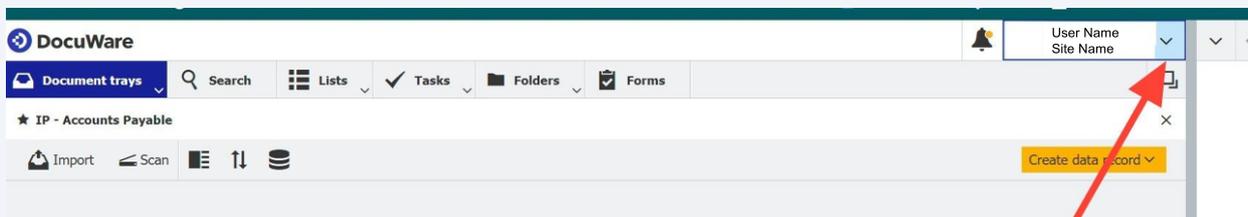


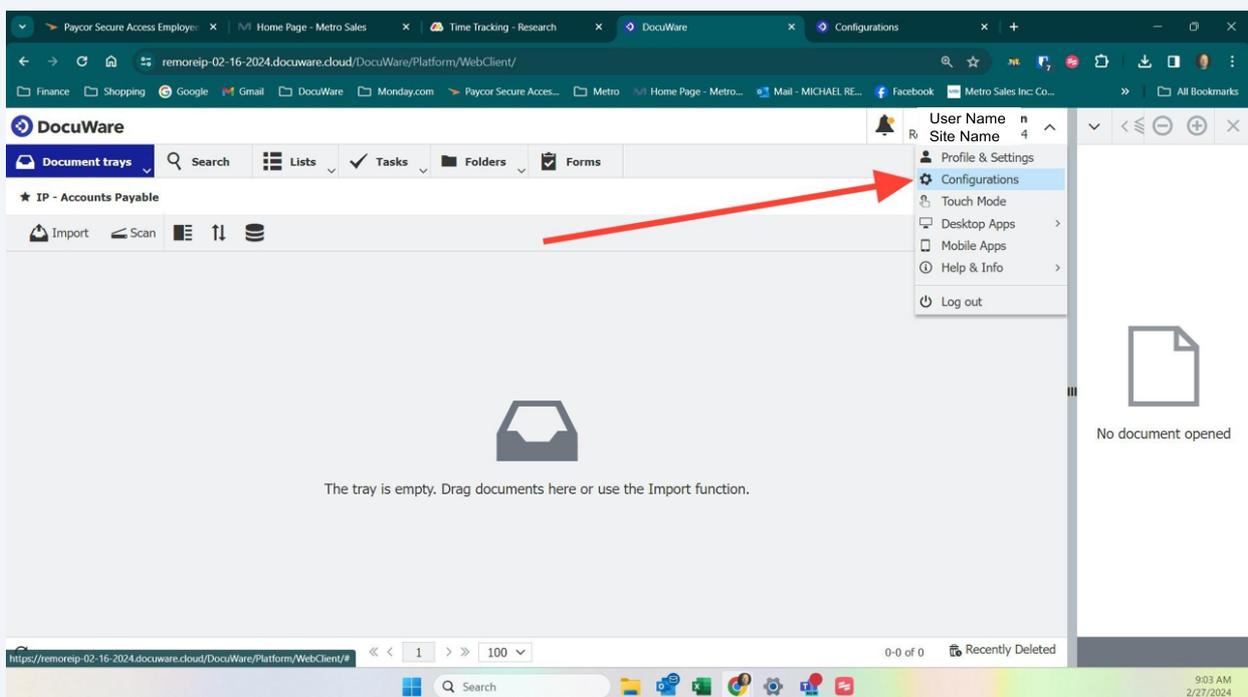
# User Management 3- Creating User Roles

This guide provides step-by-step instructions on how to create user roles in the DocuWare user management system. By following these steps, users can easily assign specific roles to individuals or groups, ensuring efficient organization and management of user permissions. This guide also hints at a subsequent document that explains how to manage user permissions via roles, making it a valuable resource for anyone looking to streamline user management processes.

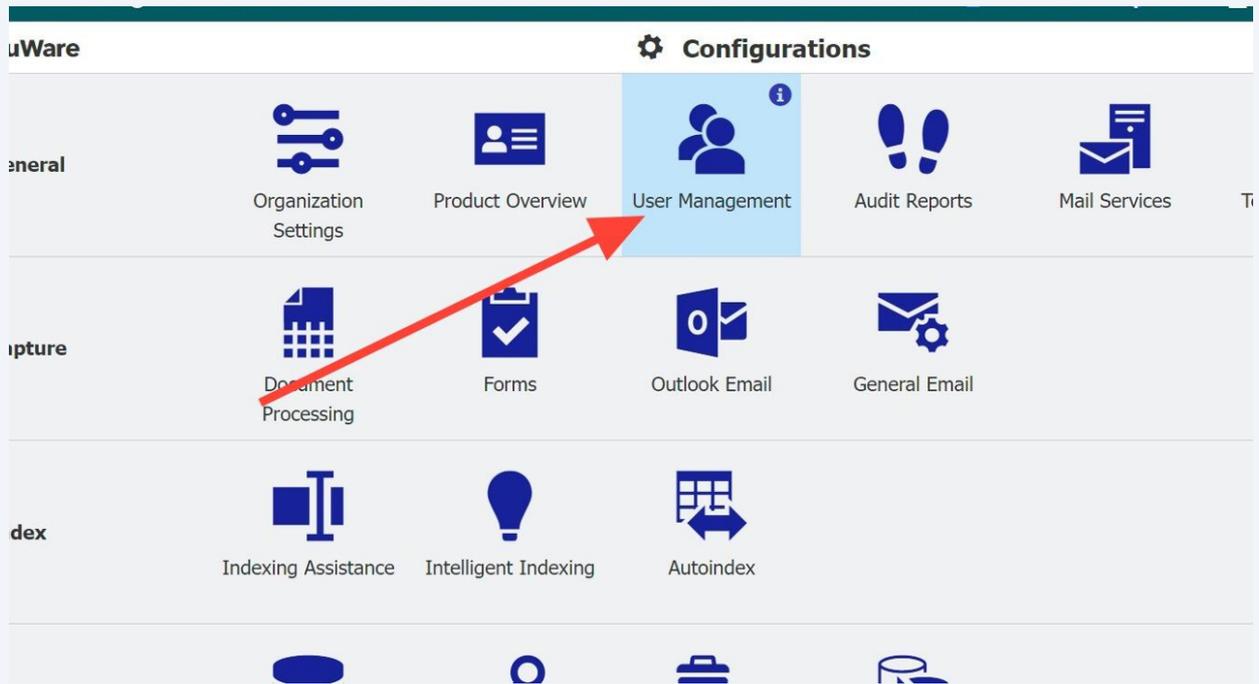
1 Click on the drop-down next to the user/site name:



2 Click "Configurations"



### 3 Choose "User Management"



### 4 Click "Roles"



## 5 Choose "New Role"

Users Groups Roles Function Profiles

New Role

Name	Active	Users/Groups
Default Organization role	<input checked="" type="checkbox"/>	
IP - Administrator	<input checked="" type="checkbox"/>	
IP - Approval Rejected	<input checked="" type="checkbox"/>	
IP - Default Functions	<input checked="" type="checkbox"/>	
IP - Final Invoice Processing	<input checked="" type="checkbox"/>	
IP - Finance Manager	<input checked="" type="checkbox"/>	
IP - Finance Users	<input checked="" type="checkbox"/>	
IP - Invoice Distributor	<input checked="" type="checkbox"/>	
IP - Invoice Table Detail User	<input checked="" type="checkbox"/>	
IP - Invoice Validator	<input checked="" type="checkbox"/>	

## 6 Name the Role

Function profiles File cabinet profiles Dialogs Users/Groups

**Choose the function profiles to include in the role**

Use	Name
<input type="checkbox"/>	Select all
<input type="checkbox"/>	Default Organization profile
<input type="checkbox"/>	IP - Administrator

## 7 Click "Users/Groups"

< Back Save

Test Role

Function profiles | File cabinet profiles | Dialogs | **Users/Groups**

Choose the function profiles to include in the role

Use	Name
<input type="checkbox"/>	Select all
<input type="checkbox"/>	Default Organization profile
<input type="checkbox"/>	IP - Administrator
<input type="checkbox"/>	IP - Default Profile

## 8 Choose which users you would like to assign to the Role:

Test Role

Function profiles | File cabinet profiles | Dialogs | **Users/Groups**

Assign the role to users and groups

**All** | Users | Groups

Use	Name	Type
<input type="checkbox"/>	Select all	
<input checked="" type="checkbox"/>	brian.ford	User
<input checked="" type="checkbox"/>	elizabeth.cash	User
<input type="checkbox"/>	fred.winner	User
<input type="checkbox"/>	mremore	User
<input type="checkbox"/>	mremore.admin	User
<input checked="" type="checkbox"/>	peggy.jenkins	User
<input type="checkbox"/>	peter.king	User
<input type="checkbox"/>	peter.sanders	User
<input type="checkbox"/>	Public	Group
<input type="checkbox"/>	simon.stone	User

9 Click "Save"

The screenshot shows the 'User Management' interface. At the top right, there is a yellow 'Save' button highlighted with a red rectangular box. Below the header, there are tabs for 'Function profiles', 'File cabinet profiles', 'Dialogs', and 'Users/Groups'. The 'Users/Groups' tab is active. The main content area is titled 'Assign the role to users and groups' and contains a table with columns 'Use', 'Name', and 'Type'. The table lists several users, with checkboxes in the 'Use' column. Some checkboxes are checked, indicating that users are assigned to the role.

Use	Name	Type
<input type="checkbox"/>	Select all	
<input checked="" type="checkbox"/>	brian.ford	User
<input checked="" type="checkbox"/>	elizabeth.cash	User
<input type="checkbox"/>	fred.winner	User
<input type="checkbox"/>	mremore	User
<input type="checkbox"/>	mremore.admin	User
<input checked="" type="checkbox"/>	peggy.jenkins	User
<input type="checkbox"/>	peter.king	User
<input checked="" type="checkbox"/>	petersanders	User
<input type="checkbox"/>	Public	Group
<input type="checkbox"/>	simon.stone	User

10 Users assigned to the role can be seen by hovering on this icon:

The screenshot shows a list of roles with checkboxes in the 'Use' column. A red arrow points to a small icon representing users. A tooltip is displayed over this icon, showing the names of the users assigned to the role: elizabeth.cash, peggy.jenkins, brian.ford, and peter.sanders.

11 The available tabs will be explained in the "User Management 4- Managing User permissions via Roles" document.

The screenshot shows the 'Test Role' interface. At the top, there are tabs for 'Function profiles', 'File cabinet profiles', 'Dialogs', and 'Users/Groups'. The 'Function profiles' tab is highlighted with a red rectangular box. Below the tabs, there is a section titled 'Choose the function profiles to include in the role' with a search filter and a table with columns 'Use' and 'Name'. The table lists several function profiles, with checkboxes in the 'Use' column.

Use	Name
<input type="checkbox"/>	Select all
<input type="checkbox"/>	Default Organization profile
<input type="checkbox"/>	IP - Administrator
<input type="checkbox"/>	IP - Default Profile