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.



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4 Click	"Roles"							
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5 Choose "New Role"

	Users	Groups	Roles	Function Profiles
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Name	-	Active	Users/Groups	
Default Organization role			2	
IP - Administrator		\checkmark	2	
IP - Approval Rejected		\checkmark	2	
IP - Default Functions		\checkmark	2	
IP - Final Invoice Processing		\checkmark	2	
IP - Finance Manager		\checkmark	2	
IP - Finance Users		\checkmark	2	
IP - Invoice Distributor		\checkmark	2	
IP - Invoice Table Detail User		~	2	
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Click "Users/Groups"

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Choose the fur	Name Select all	Q Filter	•
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Choose the fur	Name Select all Default Organization profile IP - Administrator	Q Filter	

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

ign the role t	o users and groups	
Users	Groups	۹ <i>Filter</i>
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9 Click "Save"

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

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

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