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:
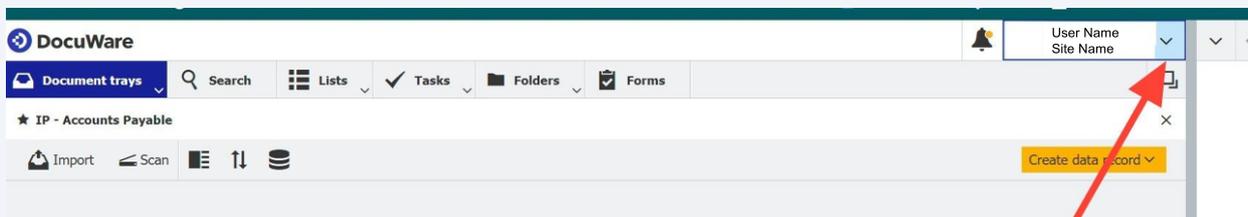
2   Click "Configurations"
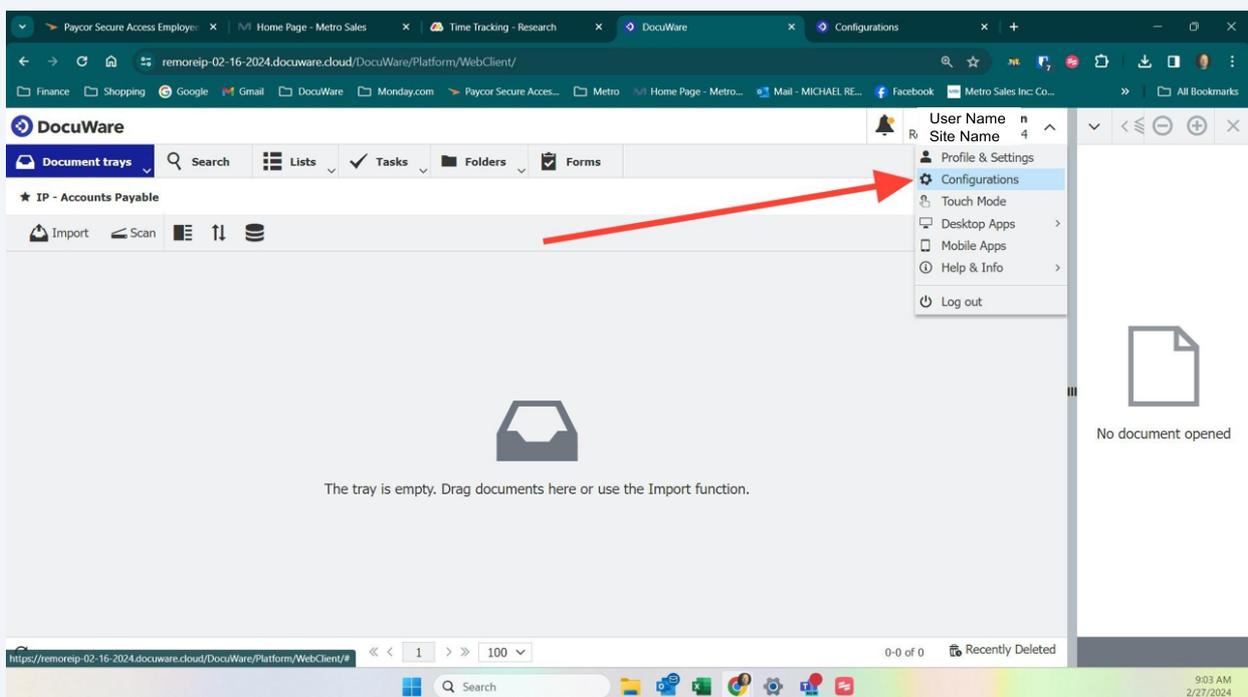
3 Choose "User Management"
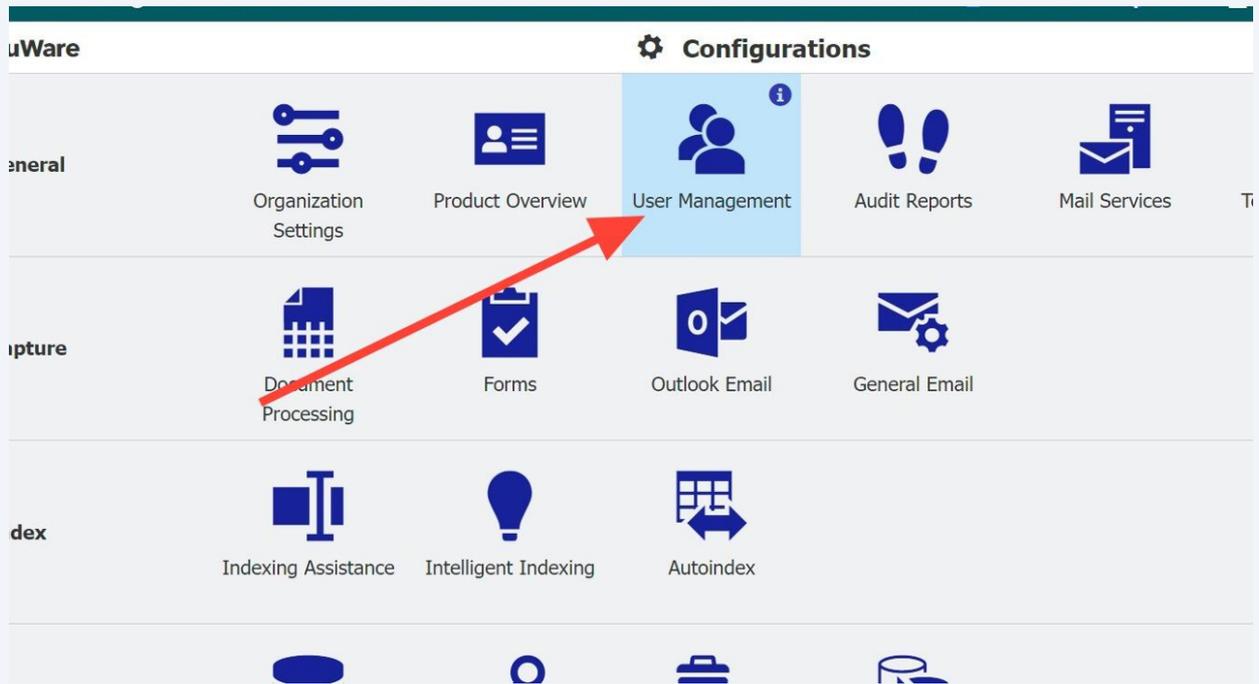
4 Click "Roles"

5 Choose "New Role"

	Users	Groups	Roles	Function Profiles

New Role   🔍 *Filter*

Name ▲	Active	Users/Groups	
Default Organization role	☑	👥	
IP - Administrator	☑	👥	
IP - Approval Rejected	☑	👥	
IP - Default Functions	☑	👥	
IP - Final Invoice Processing	☑	👥	
IP - Finance Manager	☑	👥	
IP - Finance Users	☑	👥	
IP - Invoice Distributor	☑	👥	
IP - Invoice Table Detail User	☑	👥	
IP - Invoice Validator	☑	👥	

6 Name the Role

Test Role

Function profiles	File cabinet profiles	Dialogs	Users/Groups

Choose the function profiles to include in the role

🔍

Use	Name
☐	Select all
☐	Default Organization profile
☐	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

🔍 Filter

Use	Name ▲
☐	Select all
☐	Default Organization profile
☐	IP - Administrator
☐	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 |

🔍 Filter

Use	Name ▲	Type
☐	Select all	
☑	brian.ford	User
☑	elizabeth.cash	User
☐	fred.winner	User
☐	mremore	User
☐	mremore.admin	User
☑	peggy.jenkins	User
☐	peter.king	User
☐	peter.sanders	User
☐	Public	Group
☐	simon.stone	User

9 Click "Save"

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

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