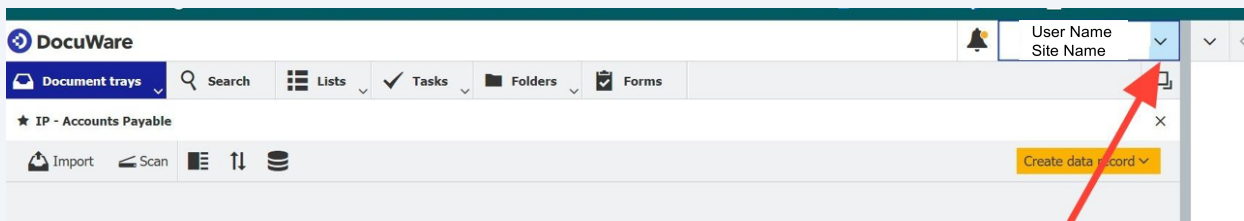


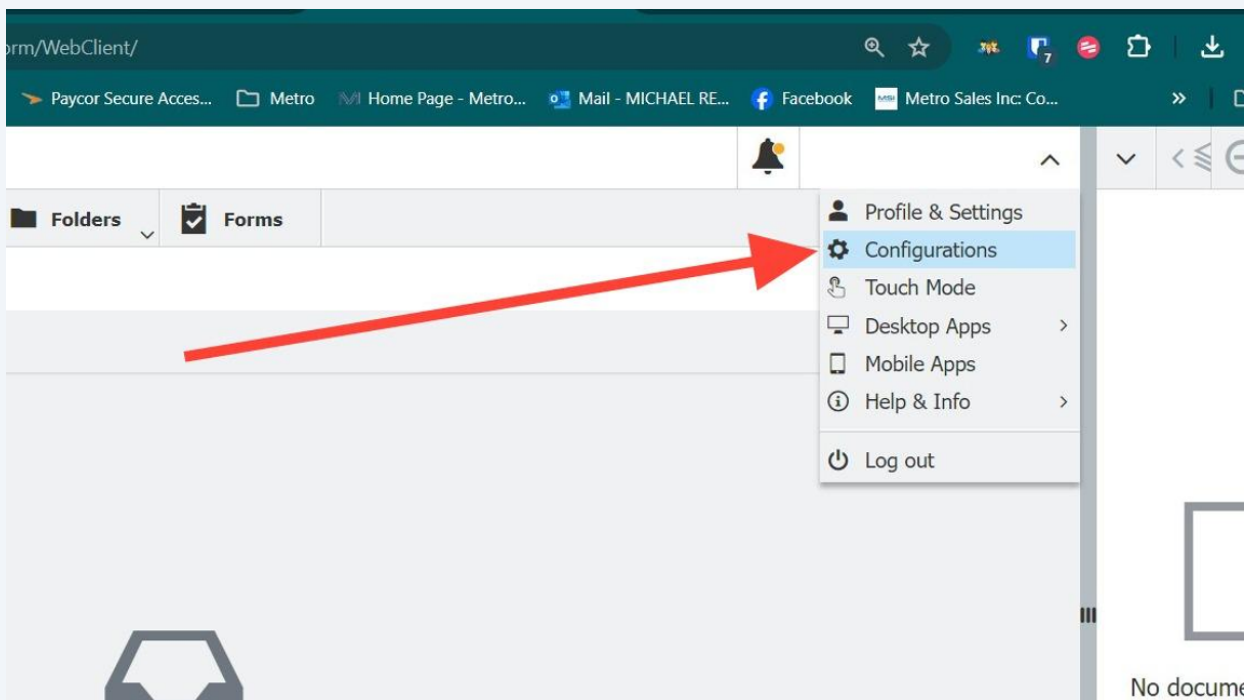
User Management 4- Managing User permissions via Roles

This guide provides step-by-step instructions on how to manage user permissions via roles in a user management system. It covers how to modify roles, specify access permissions for function profiles, file cabinet profiles, and dialogs, as well as how to assign users to roles. The guide also provides links to the DocuWare Knowledge Center for more detailed information on each topic. By following this guide, users can effectively manage user permissions and access levels in their organization's user management system.

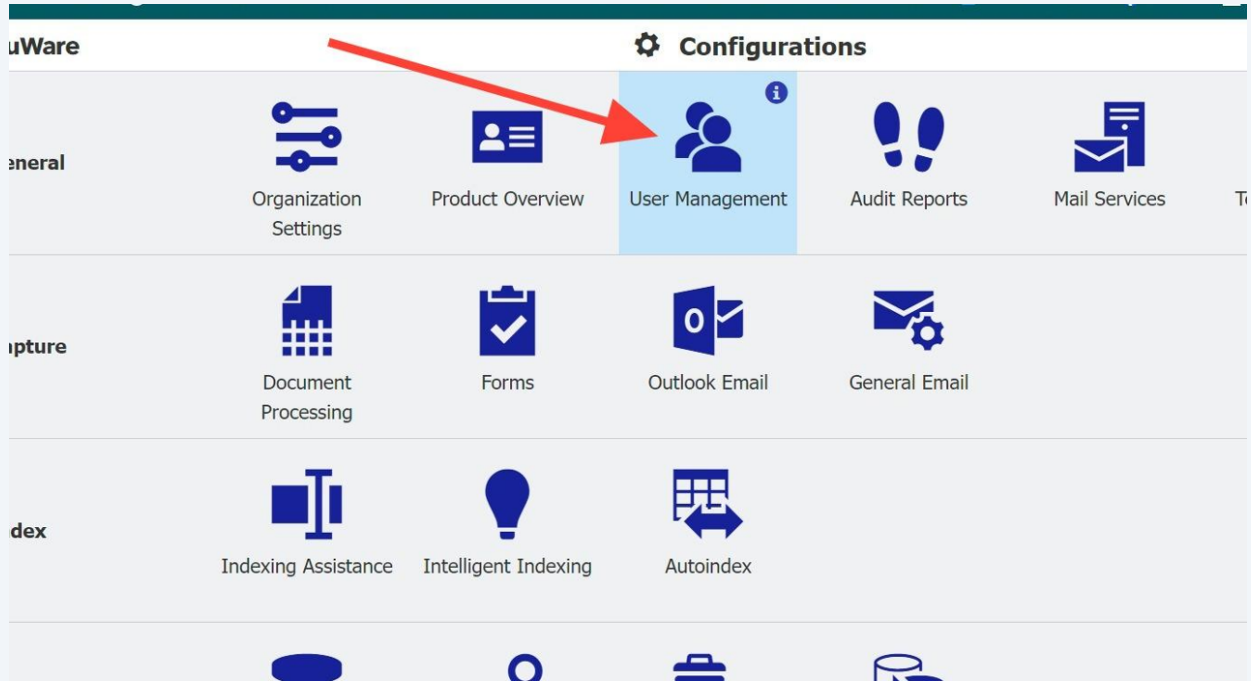
1 Click on the drop-down next to the user/site name:



2 Click "Configurations"



3 Choose "User Management"



4 Click "Roles"



5 Click on the Role to be modified

The screenshot shows a web interface with tabs for 'Users', 'Groups', 'Roles', and 'Function Profiles'. The 'Roles' tab is active. A 'New Role' button is on the left, and a search filter is on the right. A table lists various roles with columns for 'Name', 'Active', and 'Users/Groups'. A red arrow points to the 'Test Role' entry at the bottom of the list.

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 Use	<input checked="" type="checkbox"/>	
IP - Invoice Validat	<input checked="" type="checkbox"/>	
Organizat	<input checked="" type="checkbox"/>	
Test Role	<input checked="" type="checkbox"/>	

6 Choose this tab to specify access permissions for function profiles. Function profiles deal with settings for administrators and engineers. Function profiles are created in the "Function Profiles" tab of the main "User Management" module. More detailed information on function profiles can be found in the DocuWare Knowledge Center: <https://help.docuware.com/#/home/63947/2/2>

The screenshot shows the configuration page for 'Test Role'. The 'Function profiles' tab is selected and highlighted with a red box. Below the tabs, there is a section titled 'Choose the function profiles to include in the role' with a search filter. A table lists available 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

7 To specify file cabinet access, choose "File cabinet profiles".

The screenshot shows the 'User Management' interface. At the top, there is a header with a user icon and the text 'User Management'. Below the header, there is a navigation bar with a '< Back' button on the left and a 'Save' button on the right. The main content area is titled 'Test Role' and contains several tabs: 'Function profile', 'File cabinet profiles', 'Dialogs', and 'Users/Groups'. The 'File cabinet profiles' tab is highlighted with a red box. Below the tabs, there is a section titled 'Choose the function profiles to include in the role' with a search filter box labeled 'Filter'. A table is displayed below the filter, with columns 'Use' and 'Name'. The table contains the following rows:

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 To specify file cabinet access, choose "File cabinet profiles". Choose the access permissions for the file cabinet. More detailed information on permissions can be found in the DocuWare Knowledge Center: <https://help.docuware.com/#/home/61944/2/2>

The screenshot shows the 'User Management' interface. At the top, there is a header with a user icon and the text 'User Management'. Below the header, there is a navigation bar with a '< Back' button on the left and a 'Save' button on the right. The main content area is titled 'Test Role' and contains several tabs: 'Function profile', 'File cabinet profiles', 'Dialogs', and 'Users/Groups'. The 'File cabinet profiles' tab is highlighted with a red box. Below the tabs, there is a table with columns 'Use', 'Name', 'File cabinet', and 'Type'. The table contains the following rows:

Use	Name	File cabinet	Type
<input type="checkbox"/>	Select all		
<input checked="" type="checkbox"/>	Delete	IP - Accounting	standard
<input checked="" type="checkbox"/>	Edit	IP - Accounting	standard
<input type="checkbox"/>	Owner	IP - Accounting	standard
<input checked="" type="checkbox"/>	Read	IP - Accounting	standard
<input type="checkbox"/>	Store	IP - Accounting	custom
<input type="checkbox"/>	Subsidiary1	IP - Accounting	index value
<input type="checkbox"/>	Delete	IP - Company Records	standard
<input type="checkbox"/>	Edit	IP - Company Records	standard

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To specify file cabinet access, choose "File cabinet profiles". Choose the access permissions for the file cabinet. More detailed information on permissions can be found in the DocuWare Knowledge Center:

<https://help.docuware.com/#/home/61944/2/2>

Test Role

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

Choose the file cabinet profiles to include in the role

All Standard Profiles Custom Profiles Index Value Profiles

Use	Name	File cabinet	Type
<input type="checkbox"/>	Select all		
<input type="checkbox"/>	Delete	IP - Accounting	standard
<input type="checkbox"/>	Edit	IP - Accounting	standard
<input type="checkbox"/>	Owner	IP - Accounting	standard
<input type="checkbox"/>	Read	IP - Accounting	standard
<input type="checkbox"/>	Store	IP - Accounting	custom
<input type="checkbox"/>	Subsidiary1	IP - Accounting	index value
<input type="checkbox"/>	Delete	IP - Company Records	standard
<input type="checkbox"/>	Edit	IP - Company Records	standard
<input type="checkbox"/>	Owner	IP - Company Records	standard
<input type="checkbox"/>	Read	IP - Company Records	standard

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To specify access to search, store, and result dialogs, choose "Dialogs". More detailed information on dialogs can be found in the DocuWare Knowledge Center:

<https://help.docuware.com/#/home/61947/2/2>

Choose the dialogs to include in the role

All Search **Store** Result List Folders

Use	Name	File cabinet	Type
<input type="checkbox"/>	Select all		
<input type="checkbox"/>	Delete	IP - Accounting	Store
<input checked="" type="checkbox"/>	Accounts Payable with Table Detail	IP - Accounting	Store
<input checked="" type="checkbox"/>	Packing Slip	IP - Accounting	Store
<input type="checkbox"/>	Purchase Order	IP - Accounting	Store
<input checked="" type="checkbox"/>	Debit/Credit Memos	IP - Accounting	Store
<input checked="" type="checkbox"/>	Booking Record	IP - Accounting	Store
<input type="checkbox"/>	Accounts Payable	IP - Accounting	Store
<input type="checkbox"/>	All Fields	IP - Accounting	Store
<input type="checkbox"/>	Vendor Master Record	IP - Company Records	Store
<input type="checkbox"/>	Vendor Onboarding Form	IP - Company Records	Store
<input type="checkbox"/>	Company Credit Card Record	IP - Company Records	Store
<input type="checkbox"/>	All Fields	IP - Personnel	Store
<input type="checkbox"/>	New Costcenter Group User	IP - Personnel	Store

11 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

12 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


13 Click "Save"

The screenshot shows the 'User Management' interface. At the top right, a yellow 'Save' button is highlighted with a red rectangular box. Below the header, there are tabs for 'Role', 'Function profiles', 'File cabinet profiles', 'Dialogs', and 'Users/Groups'. The 'Users/Groups' tab is active. Below the tabs, there is a section titled 'Assign the role to users and groups'. This section contains a table with columns 'Use', 'Name', and 'Type'. The table lists several users and groups, with checkboxes in the 'Use' column. The users listed are brian.ford, elizabeth.cash, fred.winner, mremore, mremore.admin, peggy.jenkins, peter.king, peter.sanders, and simon.stone. The 'Public' entry is listed as a 'Group'.

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"/>	peter.sanders	User
<input type="checkbox"/>	Public	Group
<input type="checkbox"/>	simon.stone	User

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

The screenshot shows a list of roles with checkboxes in the first column. The role 'IP - Finance Manager' is highlighted in grey. A red arrow points to a user icon in the second column of this row. A tooltip box is open over the icon, displaying the word 'Users' and a list of user names: elizabeth.cash, peggy.jenkins, brian.ford, and peter.sanders.

<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	