


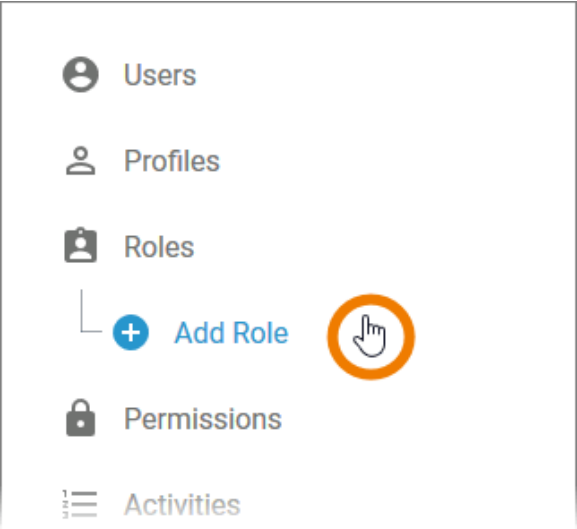
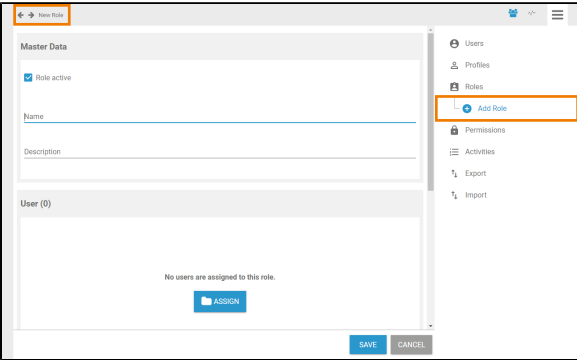
Adding a Role

During modelling, you can create roles in the BPMN editor (Designer) and in the BPaaS editor. You can also create them in the **Roles** menu of the user management.



When a role is created during modeling, only the role's name is determined. All other settings have to be inserted in the role's data sheet in the user management.

Creating a Role in the User Management

| | |
|---|--|
|  | Select option Add Role from the sidebar menu. |
|  | An empty role data sheet opens. |

Entering Master Data

On this Page:

- [Creating a Role in the User Management](#)
 - [Entering Master Data](#)
 - [Assigning Users](#)
 - [Inserting Translations \(BPaaS\)](#)
- [Creating a Role in the Designer](#)
- [Creating a Role in BPaaS](#)

Related Pages:

- [Managing Roles](#)
 - [Editing a Role](#)
- [Managing Users](#)
- [Reusing User Data](#)
 - [Reusing Central Roles](#)
- [Working With the User Management](#)

Related Documentation:

- [Designer Guide](#)
 - [Role-based Authorization Concept](#)
- [BPaaS](#)
 - [Role-based Authorization Concept](#)

Master Data

☒ Role active

Name

Insert a **Na**
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role.

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| | |
|--|---|
| <div data-bbox="168 163 316 195">Master Data</div> <div data-bbox="168 222 719 499"> <div data-bbox="168 264 329 296"> <input checked="" type="checkbox"/> Role active </div> <div data-bbox="168 390 709 453"> <div data-bbox="168 390 243 422">Name</div> <div data-bbox="168 426 495 453">Allowed characters are 0-9, a-z and . - _ !</div> </div> </div> | <p>The Name field must not be empty.</p> <p>Allowed characters are:</p> <ul style="list-style-type: none"> • numbers 0-9 • letters a-z and A-Z • special characters . - _ and ! |
| <div data-bbox="168 646 316 678">Master Data</div> <div data-bbox="168 705 719 966"> <div data-bbox="168 747 329 779"> <input checked="" type="checkbox"/> Role active </div> <div data-bbox="168 846 719 945"> <div data-bbox="168 846 228 867">Name</div> <div data-bbox="168 873 263 900">head_hr</div> <div data-bbox="467 884 654 911">This name is already in use.</div> </div> </div> | <p>The input in the Name field must be unique.</p> <p>Therefore, your input is automatically checked.</p> <p>If the name is already in use, you need to change your entry.</p> |
| <div data-bbox="168 1060 316 1092">Master Data</div> <div data-bbox="168 1119 719 1499"> <div data-bbox="168 1161 329 1192"> <input checked="" type="checkbox"/> Role active </div> <div data-bbox="168 1257 709 1320"> <div data-bbox="168 1257 228 1278">Name</div> <div data-bbox="168 1285 263 1312">head_hr</div> <div data-bbox="670 1285 709 1320"></div> </div> <div data-bbox="168 1352 719 1446"> <div data-bbox="168 1367 269 1394">Description</div> <div data-bbox="168 1398 547 1425">Role for the HR onboarding process</div> </div> </div> | <p>You can also enter an explanatory description for your role, but this is not mandatory.</p> |
| <div data-bbox="147 1524 735 1892"> <div data-bbox="168 1539 241 1560">New Role</div> <div data-bbox="168 1581 719 1877"> <div data-bbox="168 1581 719 1772"> <div data-bbox="168 1581 245 1602">Master Data</div> <div data-bbox="168 1623 251 1644"> <input checked="" type="checkbox"/> Role active </div> <div data-bbox="168 1665 719 1728"> <div data-bbox="168 1665 206 1686">Name</div> <div data-bbox="168 1686 225 1707">head_hr</div> <div data-bbox="686 1665 719 1707"></div> </div> <div data-bbox="168 1707 719 1772"> <div data-bbox="168 1707 228 1728">Description</div> <div data-bbox="168 1728 341 1749">Role for the HR onboarding process</div> </div> </div> <div data-bbox="168 1793 719 1856"> <div data-bbox="168 1793 225 1814">User (0)</div> </div> <div data-bbox="623 1845 719 1877"> <div data-bbox="623 1845 670 1877">SAVE</div> <div data-bbox="670 1845 719 1877">CANCEL</div> </div> </div> </div> | <p>If you have entered the Master Data, you can already create the role by clicking the Save button.</p> |

← → Show Roles

Search (23) ✕ ▾

| # | Name | Activated |
|----|-----------------|-----------|
| 1 | head_hr | Yes |
| 2 | head_production | Yes |
| 3 | acme_employee | Yes |
| 4 | head_sales | Yes |
| 5 | head_it | Yes |
| 6 | acme_facility | Yes |
| 7 | acme_manager | Yes |
| 8 | head_accounting | Yes |
| 9 | head_marketing | Yes |
| 10 | head_purchasing | Yes |
| 11 | head_hr | Yes |

Saved successfully! [View role data sheet](#)

The role data sheet is closed, the message **Successfully saved!** is displayed and the role is added to the list.

You can use the link from the success message to reopen the role's data sheet.

Before saving the role, you can also [assign users](#) and [insert translations](#) first. But it is not mandatory to assign users or insert translations to create a role.

Assigning Users

← → New Role

Description
Role for the HR onboarding process

User (0)

No users are assigned to this role.

[ASSIGN](#)

SAVE CANCEL

In a role data sheet, the users assigned to the role are listed in the **User** section.

If you create a new role, you start with an empty **User** section. If you want to, you can assign the users to a role within the profile's data sheet.

Click button **Assign** to assign users to the role.

head_hr - Assign Users

(13) ✕ 🔽

| # | Last Name | First Name | Login | Company | Valid until | Activated |
|---|-------------|------------|-------------------|------------|-------------|-----------|
| 1 | Adler | Irene | irene.adler | ACME Corp. | 12/31/2099 | Yes |
| 2 | Marple | Jane | jane.marple | ACME Corp. | 12/31/2099 | Yes |
| 3 | Admin | ACME | acme.admin | ACME Corp. | 12/31/2099 | Yes |
| 4 | Watson | John | john.watson | ACME Corp. | 12/31/2099 | Yes |
| 5 | Doolittle | Eliza | eliza.doolittle | ACME Corp. | 12/31/2099 | Yes |
| 6 | West | Raymond | raymond.west | ACME Corp. | 12/31/2099 | Yes |
| 7 | Higgins | Henry | henry.higgins | ACME Corp. | 12/31/2099 | Yes |
| 8 | Bloom | Leopold | leopold.bloom | ACME Corp. | 12/31/2099 | Yes |
| 9 | Copperfield | David | david.copperfield | ACME Corp. | 12/31/2099 | Yes |

APPLY CANCEL

The list of all available [users](#) opens.

Use the corresponding checkboxes to choose the users you want to assign.

head_hr - Assign Users

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| # | Last Name | First Name | Login | Company | Valid until | Activated |
|---|---|------------|-----------------|------------|-------------|-----------|
| 1 | Adler | Irene | irene.adler | ACME Corp. | 12/31/2099 | Yes |
| 2 | <input checked="" type="checkbox"/> Marple | Jane | jane.marple | ACME Corp. | 12/31/2099 | Yes |
| 3 | <input type="checkbox"/> Admin | ACME | acme.admin | ACME Corp. | 12/31/2099 | Yes |
| 4 | <input type="checkbox"/> Watson | John | john.watson | ACME Corp. | 12/31/2099 | Yes |
| 5 | <input checked="" type="checkbox"/> Doolittle | Eliza | eliza.doolittle | ACME Corp. | 12/31/2099 | Yes |
| 6 | <input checked="" type="checkbox"/> West | Raymond | raymond.west | ACME Corp. | 12/31/2099 | Yes |
| 7 | <input type="checkbox"/> Higgins | Henry | henry.higgins | ACME Corp. | 12/31/2099 | Yes |
| 8 | <input type="checkbox"/> Bloom | Leopold | leopold.bloom | ACME Corp. | 12/31/2099 | Yes |

eliza.doolittle jane.marple raymond.west

APPLY CANCEL

All selected users are displayed in the footer of the list.

Click **Apply** to assign the users to the profile.

New Role

Description
Role for the HR onboarding process

User (3) ASSIGN MORE

| Last Name | First Name | Login | | |
|-----------|------------|-----------------|---|---|
| Doolittle | Eliza | eliza.doolittle | ✕ | 📄 |
| Marple | Jane | jane.marple | ✕ | 📄 |
| West | Raymond | raymond.west | ✕ | 📄 |

SAVE CANCEL

Your selection is transferred to the **User** section of the role data sheet.

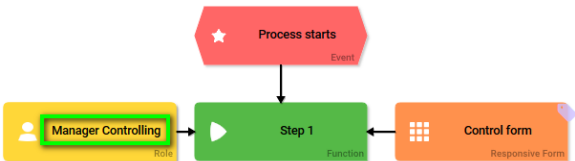
When all necessary users have been assigned, you can save the role data sheet or continue to edit the role by [inserting translations](#).

i When a user is added or removed

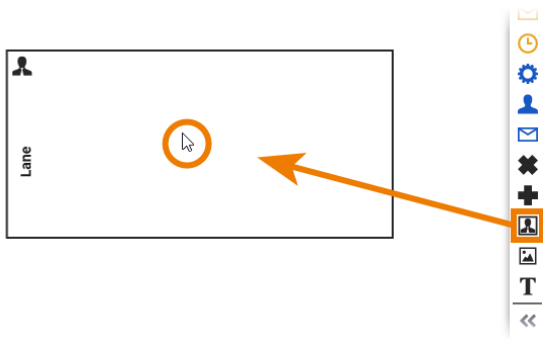
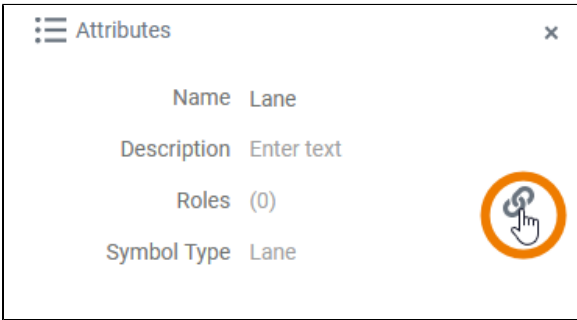

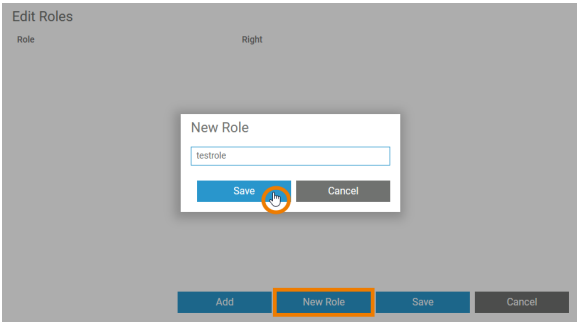
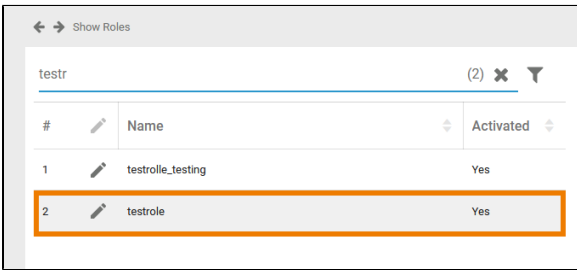
ed a role, they must log in to the system again for the changes to affect their account. This also applies to the **Scheer PAS** Mobile A

Inserting Translations (BPaaS)

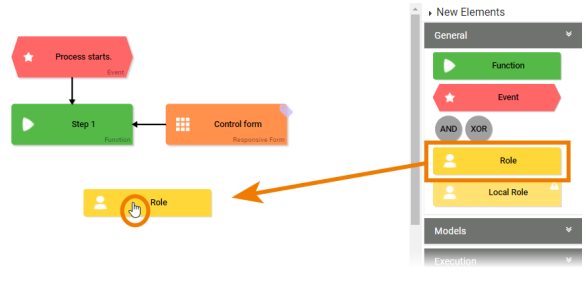
The role name inserted in section **Master Data** is a technical name for the role. In section **Translations** you can insert translations for the profile's display names (this applies to usage in BPaaS only).

| | |
|---|---|
| <div>Translations</div> <div>EDIT TRANSLATIONS</div> | <p>Use window Translations to insert the display name in different languages.</p> |
| <div>Translations</div> <div> <div>German</div> <div>English</div> <div>French</div> </div> | <p>Clicking button Edit Translations will show the fields German, English and French.</p> <p>The names inserted in those fields will be shown in BPaaS according to the language selected for the user interface.</p> |
|  | <p>The names saved in this section will be shown in the EPC models in BPaaS according to the language selected for the BPaaS user interface.</p> |

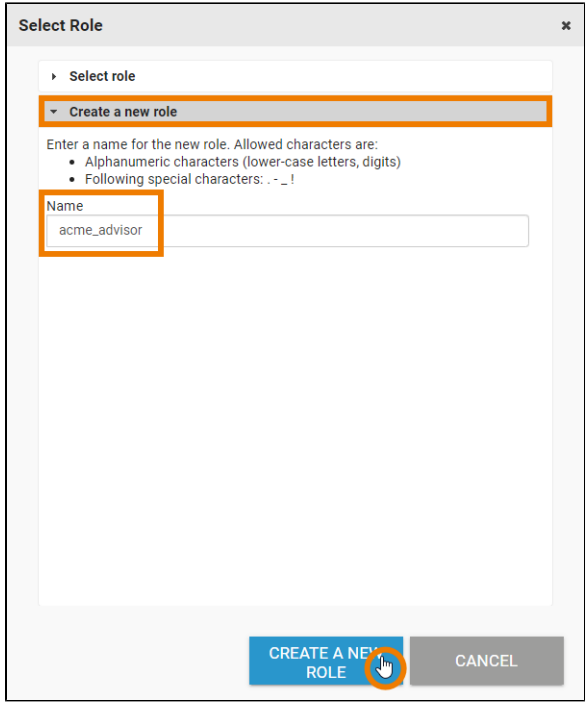
Creating a Role in the Designer

|  | Designer users can create roles during modelling in the BPMN editor by using the Lane element. | | | | | | | | | |
|--|--|-----------|-----------|---|-------------------|-----|---|----------|-----|---|
|  | To create a new role, open the Attributes of the lane element and click icon  to open the role editor. | | | | | | | | | |
|  | Click button New Role to create a new role and assign it to the lane element. | | | | | | | | | |
|  <table><thead><tr><th>#</th><th>Name</th><th>Activated</th></tr></thead><tbody><tr><td>1</td><td>testrolle_testing</td><td>Yes</td></tr><tr style="border: 2px solid orange;"><td>2</td><td>testrole</td><td>Yes</td></tr></tbody></table> | # | Name | Activated | 1 | testrolle_testing | Yes | 2 | testrole | Yes | The roles created in the Designer will automatically appear in the roles list in the user management where they can be managed and assigned to users. |
| # | Name | Activated | | | | | | | | |
| 1 | testrolle_testing | Yes | | | | | | | | |
| 2 | testrole | Yes | | | | | | | | |

Creating a Role in BPaaS

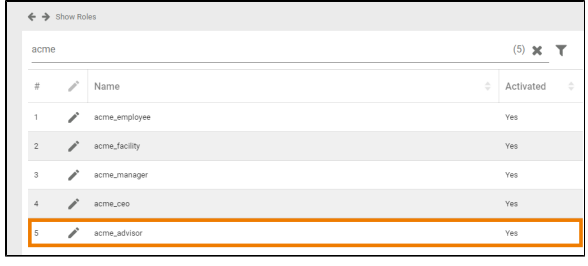


BPaaS design users can create roles during modelling in the BPaaS editor by using the **Role** element.



In BPaaS, a wizard supports the design user when creating a new role.

The user can choose if he wants to select an already created role or if he wants to create a new role.



The roles created in BPaaS will automatically appear in the roles list in the user management where they can be managed and assigned to users.