

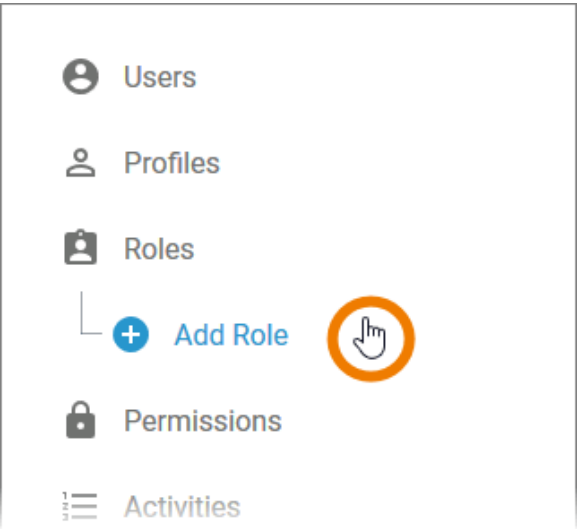
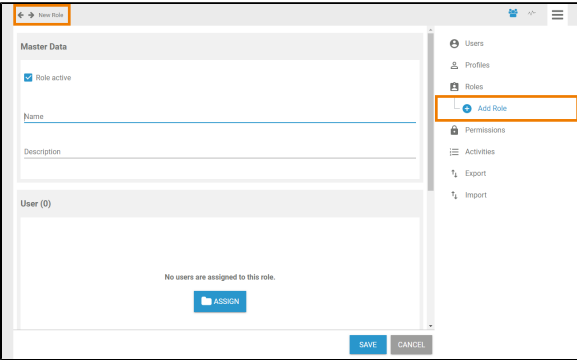
Adding a Role

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

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Related Pages:

- [Managing Roles](#)
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- [Managing Users](#)
- [Reusing User Data](#)
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- [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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Master Data ☒ Role active Name Allowed characters are 0-9, a-z and . - _ !	The Name field must not be empty. Allowed characters are: • numbers 0-9 • letters a-z and A-Z • special characters . - _ and !
Master Data ☒ Role active Name head_hr This name is already in use.	The input in the Name field must be unique. Therefore, your input is automatically checked. If the name is already in use, you need to change your entry.
Master Data ☒ Role active Name head_hr  Description Role for the HR onboarding process	You can also enter an explanatory description for your role, but this is not mandatory.
← → New Role Master Data ☒ Role active Name head_hr  Description Role for the HR onboarding process User (0) SAVE CANCEL	If you have entered the Master Data, you can already create the role by clicking the Save button.

← → 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

(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

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.

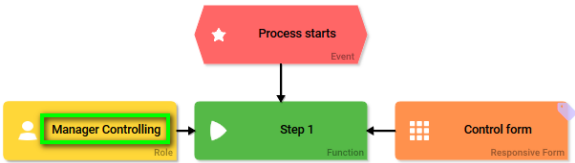
When all necessary users have been assigned, you can save the role data sheet or continue to edit the role by [inserting translations](#).

i When a user is added or removed

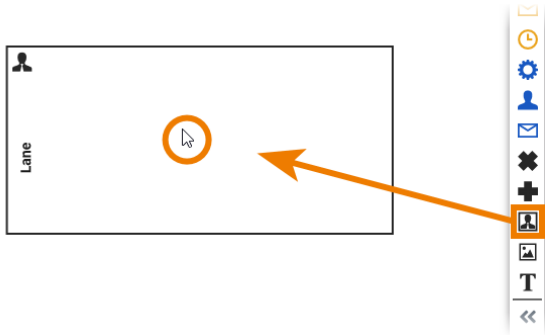
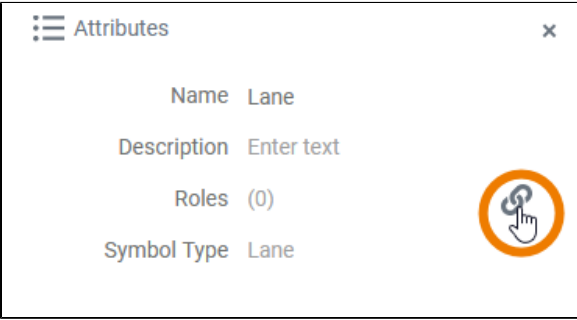
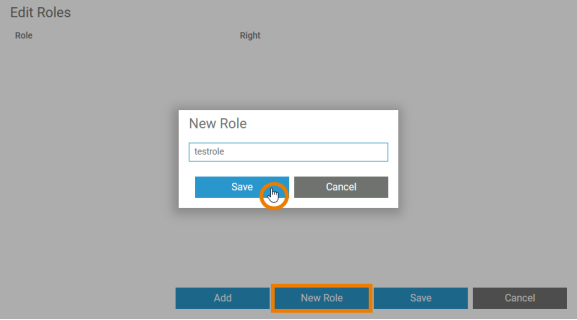
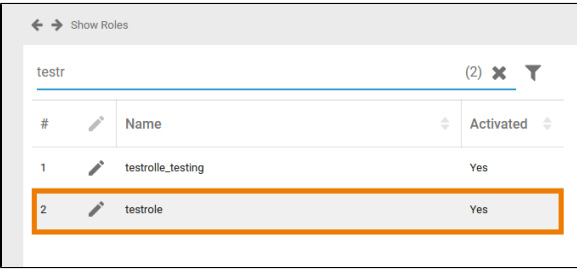
ed a role, they must log in to the system again for the changes to affect their account. This also applies to the **Scherp AS** Mobile App

Inserting Translations (BPaaS)

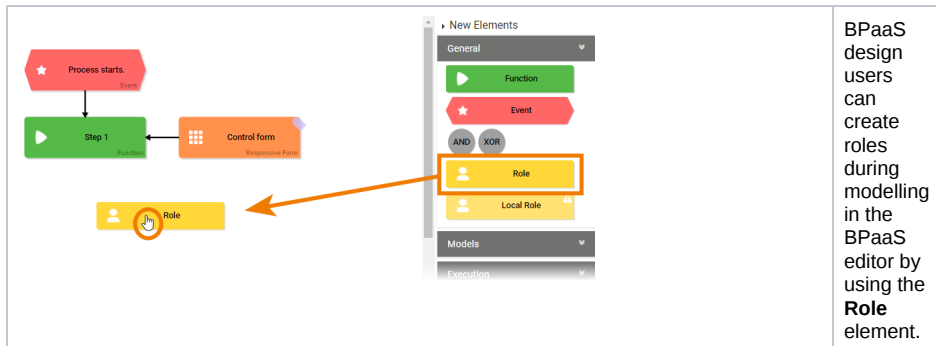
The role name inserted in section **Master Data** is a technical name for the role. In section **Translations** you can insert translations for the profile's display names (this applies to usage in BPaaS only).

Translations EDIT TRANSLATIONS	Use window Translations to insert the display name in different languages.
Translations German English French	Clicking button Edit Translations will show the fields German, English and French. The names inserted in those fields will be shown in BPaaS according to the language selected for the user interface.
	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.

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.
	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.

Creating a Role in BPaaS



Select Role

Select role

Create a new role

Enter a name for the new role. Allowed characters are:

- Alphanumeric characters (lower-case letters, digits)
- Following special characters: . - _ !

Name

acme_advisor

CREATE A NEW ROLE CANCEL

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.

Show Roles

acme (5) ✕ ▼

#	Name	Activated
1	acme_employee	Yes
2	acme_facility	Yes
3	acme_manager	Yes
4	acme_ceo	Yes
5	acme_advisor	Yes

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.