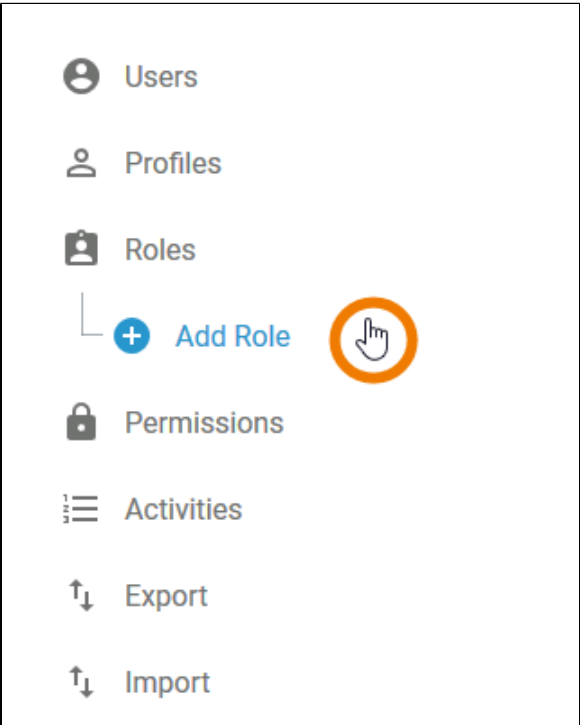


Add a Role

Roles can be created during modelling in the editor of **Scheer PAS BPaaS** as well as in the **Scheer PAS Administration**.

Creating a Role in the **Scheer PAS Administration**



Users

Profiles

Roles

+ Add Role

Permissions

Activities

Export

Import

Select option **Add Role** from the sidebar menu.

On this Page:

- [Creating a Role in the Scheer PAS Administration](#)
 - [Assigning Users](#)
 - [Inserting Translations](#)
- [Creating a Role in Scheer PAS BPaaS](#)

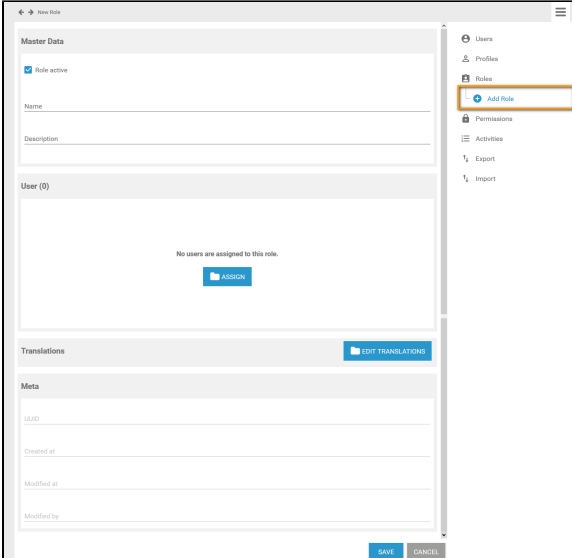
Related Pages:

- [Edit a Role](#)
- [Users](#)
- [Data Transport](#)
 - [Reusing Central Roles](#)

Related Documentation:

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

An empty role data sheet is displayed in the content area:



New Role

Master Data

☒ Role active

Name

Description

User (0)

No users are assigned to this role.

ASSIGN

Translations

EDIT TRANSLATIONS

Meta

UUID

Created at

Modified at

Modified by

SAVE CANCEL

Users

Profiles

Roles

+ Add Role

Permissions

Activities

Export

Import

<div>Master Data</div> <div> <input checked="" type="checkbox"/> Role active </div> <div> Name </div> <div> Description </div>	<p>Insert a Name for the role.</p>
<div>Master Data</div> <div> <input checked="" type="checkbox"/> Role active </div> <div> Name </div> <div> Allowed characters are 0-9, a-z, and . - _ ! </div> <div> Description </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 • special characters . - _ and !
<div>Master Data</div> <div> <input checked="" type="checkbox"/> Role active </div> <div> Name </div> <div> manager_controlling </div> <div> This name is already in use. </div> <div> Description </div>	<p>Every role's name has to be unique. Your entry in the Name field is checked automatically. If it is already in use, you need to change the name.</p>

Master Data

☒ Role active

Name
manager_controlling

Description
Role for all managers in the controlling depart

You can also enter an explanatory description for your role, but this is not mandatory.

If you have entered the **Master Data**, you can already create the role by clicking the **Save** button. 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

In a role data sheet, the users assigned to the role are listed in the **User** window. If you create a new role, you start with an empty **User** window.

Click button **Assign** to add users to the role:

The list of all available [users](#) opens. Use the corresponding checkboxes to choose the users you want to assign:

#		Last Name	First Name	Login	Company	Valid until	Activated
1	<input type="checkbox"/>	Adrian	ACME	adrian.adrian	ACME Corp.	12/31/2099	Yes
2	<input type="checkbox"/>	Adler	Irene	irene.adler	ACME Corp.	12/31/2099	Yes
3	<input type="checkbox"/>	Hagena	Henry	henry.hagena	ACME Corp.	12/31/2099	Yes
4	<input type="checkbox"/>	Doeblitz	Eliza	eliza.doeblitz	ACME Corp.	10/25/2019	Yes
5	<input type="checkbox"/>	Copperfield	David	david.copperfield	ACME Corp.	10/25/2019	Yes
6	<input checked="" type="checkbox"/>	Storn	Leopold	le100349	ACME Corp.	10/25/2019	Yes
7	<input checked="" type="checkbox"/>	Craffield	Imolen	le100317	ACME Corp.	10/25/2019	Yes
8	<input type="checkbox"/>	Oswena	Lemra	le100408	ACME Corp.	10/25/2019	Yes
9	<input checked="" type="checkbox"/>	Dedricka	Stephan	st100111	ACME Corp.	10/25/2019	Yes
10	<input type="checkbox"/>	Osghayer	John	jo100482	ACME Corp.	10/25/2019	Yes

All chosen users are displayed in the footer of the list. Click **Apply** to assign the users to the role:

New Role - Assign Users

Search (10) X Y

#	Last Name	First Name	Login	Company	Valid until	Activated
1	Admin	Admin	admin	ACME Corp	12/31/2099	Yes
2	Adler	Irene	irene.adler	ACME Corp	12/31/2099	Yes
3	Higgins	Henry	henry.higgins	ACME Corp	12/31/2099	Yes
4	Dawdle	Ella	ella.dawdle	ACME Corp	10/25/2019	Yes
5	Copperfield	David	david.copperfield	ACME Corp	10/25/2019	Yes
6	Bloom	Leopold	li100349	ACME Corp	10/25/2019	Yes
7	Caufield	Isabel	li100317	ACME Corp	10/25/2019	Yes
8	Crowe	Lennie	li100408	ACME Corp	10/25/2019	Yes
9	Dalava	Stephen	st100111	ACME Corp	10/25/2019	Yes
10	Schuyler	Jane	js100402	ACME Corp	10/25/2019	Yes

li100317 li100349 st100111

Assign Cancel

Your selection is transferred to the **User** window of the role data sheet:

New Role

Master Data

☒ Role active

Name: manager_controlling

Description: Role for all managers in the controlling department

User (3) Assign More

Last Name	First Name	Login		
Bloom	Leopold	li100349	X	
Caufield	Isabel	li100317	X	
Dalava	Stephen	st100111	X	

Save Cancel

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



When a user is added or removed a role, they must log into the system again for the changes to affect their account. This applies also to the **Scheer PAS Mobile App**.

Inserting Translations

The role name inserted in section **Master Data** is a technical name for the role. In section **Translations** you can insert display names for the role in **German**, **English** and **French**. To open the window, click button **Edit Translations**:

Translations

Edit Translations

Enter the desired display names:

New Role

User (3) Assign More

Last Name	First Name	Login		
Bloom	Leopold	li100349	X	
Caufield	Isabel	li100317	X	
Dalava	Stephen	st100111	X	

Translations

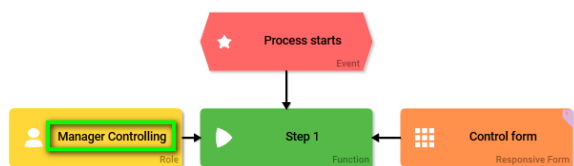
German: Abteilungsleiter Controlling

English: Manager Controlling

French: Directeur Contrôle de gestion

Save Cancel

The names saved here will be shown in the EPC models in **Scheer PAS BPaaS** according to the language selected for the BPaaS user interface:



Once you have finished all entries, click **Save** to create the role:

The 'New Role' form contains the following elements:

- User (3)**: A table with columns for Last Name, First Name, and Login. It lists three users: Bloem, Cauffeld, and Dedius.
- Translations**: A section for defining the role in different languages (German, English, French).
- Buttons**: 'SAVE' and 'CANCEL' buttons at the bottom right.

The new role is created and displayed in the list of available roles. A message **Saved successfully! Reopen Datasheet** appears:

The 'Show Roles' list displays the following information:

#	Name	Activated
1	manager_controlling	Yes

A green success message 'Saved successfully! Reopen Datasheet' is shown at the bottom left.

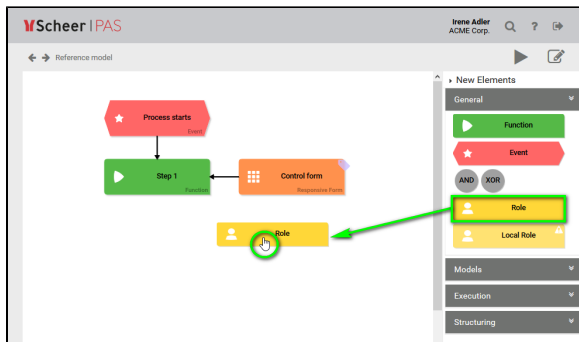
You can use the link in the success message to reopen the role data sheet, for example to edit the role data:

The 'Edit Role' form contains the following elements:

- Master Data**: Fields for 'Role active' (checked), 'Name' (manager_controlling), and 'Description' (Role for all managers in the controlling department).
- User (3)**: A table with columns for Last Name, First Name, and Login. It lists three users: Bloem, Cauffeld, and Dedius.
- Buttons**: 'CREATE A COPY', 'SAVE', and 'CANCEL' buttons at the bottom.

Creating a Role in **Scheer PAS BPaaS**

BPaaS design users can also 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 screenshot shows the 'Select Role' dialog box. It has a 'Select role' section and a 'Create a new role' section. The 'Create a new role' section has a text input field for 'Name' with the value 'advisor'. Below the input field, there are two buttons: 'CREATE A NEW ROLE' (blue) and 'CANCEL' (grey). The 'CREATE A NEW ROLE' button is highlighted with a blue box and a hand cursor.

The roles created in BPaaS will automatically appear in the **Scheer PAS Administration** where they can be managed and assigned to users:

The screenshot shows the 'show roles' interface in Scheer PAS Administration. It features a table with the following data:

#	Name	Activated
1	manager_controlling	yes
2	advisor	yes

The 'advisor' role is highlighted with a blue box. The 'Roles' tab is selected in the sidebar on the right.