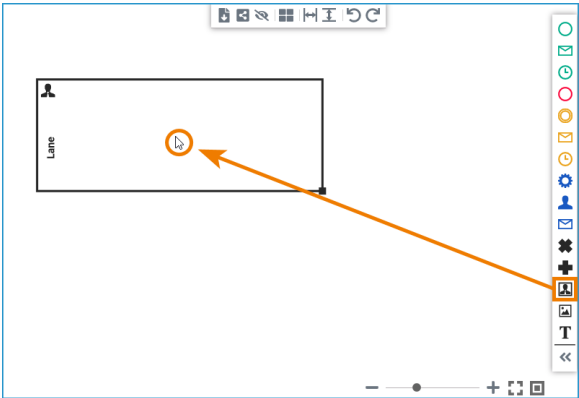


Modeling Roles

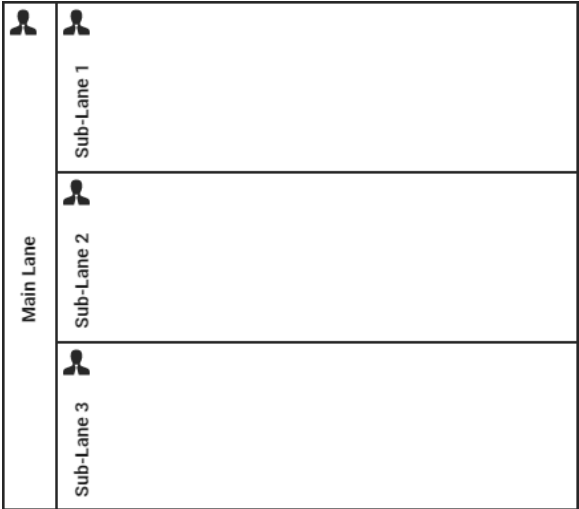
During modeling, you define which role(s) are allowed to execute a particular process step. Use the [lane](#) element in the BPMN editor to define related roles that apply to all process steps within that lane.

Using Lanes



If you want to model role-based applications, you need to use [lanes](#).

Drag & drop the element from the BPMN elements toolbar to the diagram pane.




Basic rules for modeling with lanes are:

- All lane elements must be nested into a **main lane**.

On this Page:

- [Using Lanes](#)
 - [Notes on Lane Handling](#)
- [Assigning Roles to Lanes](#)
 - [Adding an Existing Role](#)
 - [Creating a New Role](#)

Idea_Management_Example



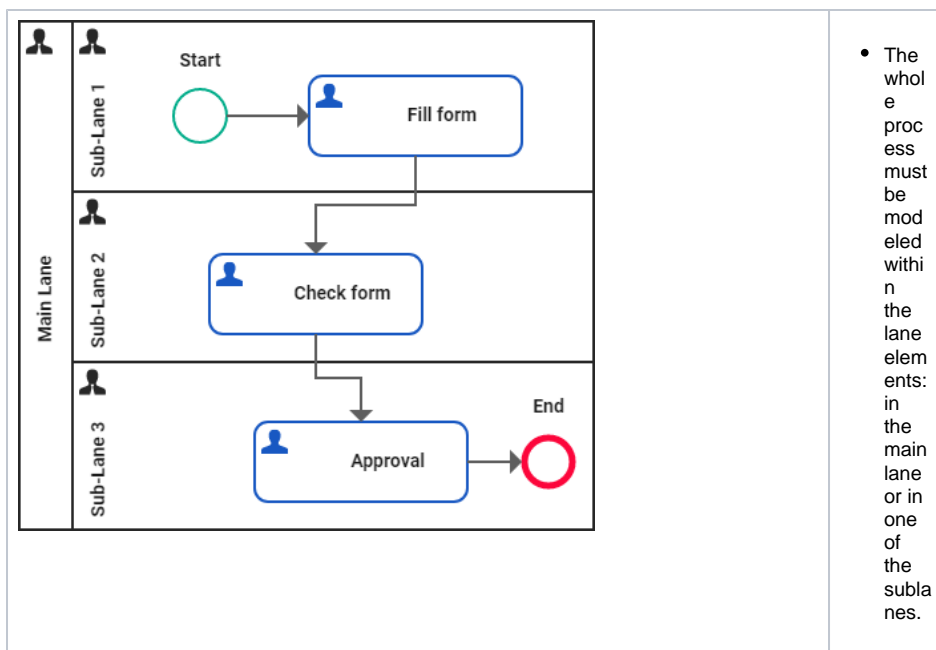
Click the icon to download a simple example model that shows what you can do with **Lanes** and **Forms** in **Scheer PAS Designer**. It also contains a configured **instance list** and shows the usage of **trigger events**.

Related Pages:

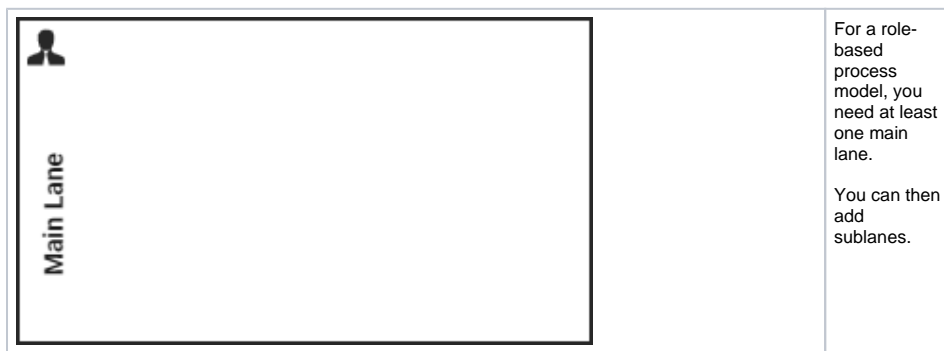
- [Role-based Authorization Concept](#)
 - [Assigning Roles](#)
- [Supported BPMN Elements](#)
 - [Lane](#)

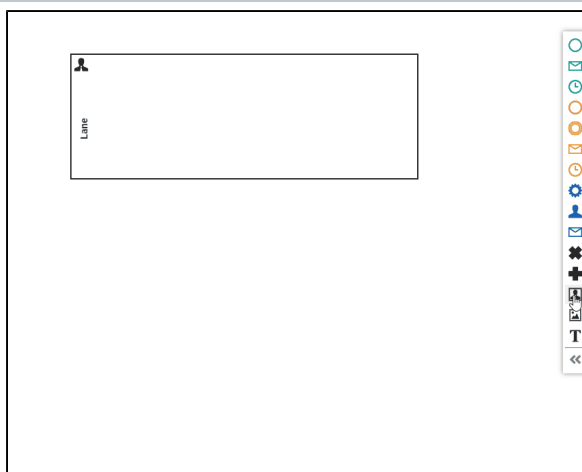
Related Documentation:

- [Administration Guide](#)
 - [Managing Roles](#)



Notes on Lane Handling





To create sublanes, drag the next lane elements onto the header of the main lane element. Drop the new element on the border of an existing lane to position the new sublane.

To create a sublane within a sublane, you can drag the element onto the body of an existing lane.

Click the image to see an animated version.

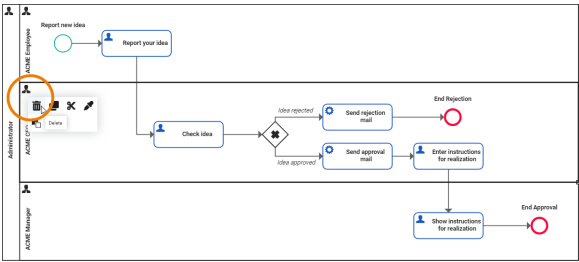


✔ To activate the language element, click its border

or icon/header. If the element is active, an indicator at or is displayed in the lower right corner and the border of the element is thicker.



Before Deletion:



After Deletion:



Deletion Behavior of Lane Elements

If you delete a lane element, it is erased from your work area including all content! However, you can

The usage of lanes is only indicated when you want to create a role-based process. In that case, you use a lane to assign one or more roles to it. The following section explains how to assign roles to lanes.

The usage of lanes is only indicated when you want to create a role-based process. In that case, you use a lane to assign one or more roles to it. The following section explains how to assign roles to lanes.

☰ Attributes

✕

Properties

⤴

Name

Main Lane

Description

Enter text

Roles

(0)

+ Add Stereotype

Symbol Type

Lane

When you click option

in the attributes panel, a separate editor will open where you can assign existing roles and create new ones.

Role Editor

Role

Right

☐ Write ☒ Read ☐ List

X

If no roles are assigned, the process steps inside the lane can be executed by all users.

Add

New Role

Save

Cancel

In the role editor, you have two options:

- You can add an already existing role.
- You can create a new role.

for roles assigned to all areas, the process steps in side the area can be executed by all users and across

o
n
d
i
n
g
n
o
t
e
i
s
d
i
s
p
l
a
y
e
d.


Adding an Existing Role

The screenshot shows a 'Role Editor' window. On the left, there is a 'Role' field with a dropdown menu open, displaying a list of roles: 'acme', 'acme_ceo', 'acme_employee', 'acme_employee_deprecated', 'acme_facility', 'acme_manager', and 'acme_test'. The 'acme' role is highlighted with a red border and a red circle. To the right of the 'Role' field is a 'Right' section with three radio buttons: 'Write', 'Read' (which is selected), and 'List'. At the bottom of the window, there are four buttons: 'Add', 'New Role', 'Save', and 'Cancel'.

When you open the role editor, it already contains an empty line.

Start typing the name of the role you are searching for in field **Role**. The field has an autocomplete function: As soon as you start inserting, a drop-down list is displayed containing all available roles that match your input.

Select the role you want to use.



The screenshot shows the 'Role Editor' window. On the left, the 'Role' dropdown is set to 'acme_manager'. On the right, under the 'Right' column, the 'Write' radio button is selected and circled in orange, while 'Read' and 'List' are unselected.

In the next step you need to assign the rights that will be granted to the role owner.

Available options are:

Right	Description
Write	A user assigned to this role will be able to see and change the instance data for all process steps in the current lane.
Read	<p>A user assigned to this role will be able to display the instance data for all process steps in the current lane.</p> <p>This right is assigned by default.</p>
List	A user assigned to this role will only be able to see the instances in the instance table for all process steps in the current lane.

Role Editor

Role	Right
<input type="text" value="acme_manager"/>	<input checked="" type="radio"/> Write <input type="radio"/> Read <input type="radio"/> List <input type="button" value="x"/>
<input type="text" value="acme_ceo"/>	<input type="radio"/> Write <input checked="" type="radio"/> Read <input type="radio"/> List <input type="button" value="x"/>
<input type="text" value="acme_employee"/>	<input type="radio"/> Write <input type="radio"/> Read <input checked="" type="radio"/> List <input type="button" value="x"/>
<input type="text"/>	

You can continue to add further roles (or create new ones, see below) as multiple roles can be assigned to one lane.

When you have finished, save your changes to apply them to the lane.

Attributes

Properties

Name

Main Lane

Description

Enter text





Roles (3)

+ Add Stereotype



Symbol Type

Lane

The number of roles assigned to a lane is displayed in the attributes panel.

<div> <h2>User Management</h2> <p>Administrate User Settings</p> </div> <div>  <p>Configure user settings for the platform.</p> </div> <div>   </div>	<p>You have to open the user management, to assign the new role to users.</p> <div>  <p>Refer to Administration Guide > Managing Roles for further information about role management.</p> </div>
--	---

Creating a New Role

<div> <div>Role Editor</div> <div> <div>Role</div> <div> <input type="text"/> </div> </div> <div> <div>Right</div> <div> <input type="radio"/> Write <input checked="" type="radio"/> Read <input type="radio"/> List </div> </div> <div> <div>Add</div> <div>New Role </div> <div>Save</div> <div>Cancel</div> </div> </div>	<p>Click New Role to create a new role and assign it to the lane element.</p>
<div> <h3>New Role</h3> <div> <input type="text" value="Enter Role name"/> </div> <div> <div>Save</div> <div>Cancel</div> </div> </div>	<p>Enter the name of the new role in the pop-up window.</p> <p>The input is mandatory.</p>
<div> <h3>New Role</h3> <div> <input type="text" value="acme_manager"/> </div> <div> <p>Role name is already in use</p> </div> <div> <div>Save</div> <div>Cancel</div> </div> </div>	<p>If the role name is already in use, you will not be able to save.</p> <p>Use the existing role instead (see Adding an Existing Role below).</p>
<div> <h3>New Role</h3> <div> <input type="text" value="acme_marketing"/> </div> <div> <div>Save </div> <div>Cancel</div> </div> </div>	<p>Save to create the role.</p>
<div> <div>Role Editor</div> <div> <div>Role</div> <div> <input type="text" value="acme_marketing"/> </div> </div> <div> <div>Right</div> <div> <input type="radio"/> Write <input checked="" type="radio"/> Read <input type="radio"/> List </div> </div> <div> <div>Add</div> <div>New Role</div> <div>Save</div> <div>Cancel</div> </div> </div>	<p>The new role is now added to the role editor and assigned to the current lane.</p>

Role Editor

Role

acme_marketing

Write

Read

List

In the next step you need to assign the rights that will be granted to the role owner.

Available options are:

Right	Description
Write	A user assigned to this role will be able to see and change the instance data for all process steps saved in the current lane.
Read	A user assigned to this role will be able to display the instance data for all process steps saved in the current lane. This right is assigned by de fault.
List	A user assigned to this role will only be able to see the instances in the instance table for all process steps saved in the current lane.

Role Editor

Role

acme_marketing

acme_ceo

acme_manager

Write

Read

List

Write

Read

List

Write

Read

List

Add

New Role

Save

Cancel

You can continue to create further roles (or add already existing ones, see below) as multiple roles can be assigned to one lane.
When you have finished, save your changes to apply them to the lane.

Attributes

Properties

Name

Main Lane

Description

Enter text

Roles

(3)

+ Add Stereotype

Symbol Type

Lane

The number of roles assigned to a lane is displayed in the attributes panel.

Scheer IPAS

Jane Marple

ACME Corp.

← → Show Roles

acme_ma

(2) ✕ 🔍

Users

Profiles

Roles

Add Role

Permissions

#	Name	Activated
1	acme_manager	Yes
2	acme_marketing	Yes

The new role has also been added to the user management. You have to open the user management, to assign the new role to users.

Refer to [Administration Guide > Managing Roles](#) for further information about role management.