
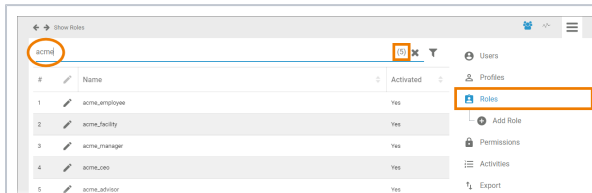


Editing a Role

You can edit the settings of existing roles in the corresponding data sheet, for example to change the role's name or to assign more users. Display the list of roles by choosing the [Roles](#) menu in the sidebar. The roles list shows all roles and its content is loading dynamically if you scroll down. Filter the list by using the [filter bar](#).

 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.

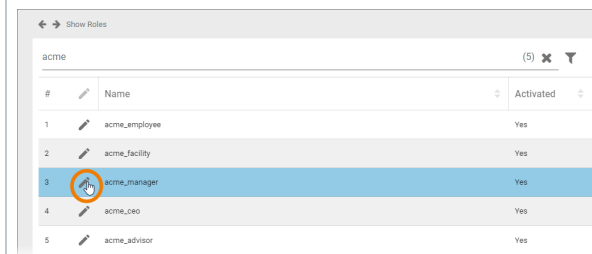
Editing Role Data




#	Name	Activated	Profiles
1	acme_employee	Yes	Roles
2	acme_facility	Yes	Add Role
3	acme_manager	Yes	Permissions
4	acme_cxo	Yes	Activities
5	acme_advisor	Yes	Export

Select **Roles** in the sidebar menu to display the list of all roles.

On the right side of the filter bar, the total number of users is displayed. If a [filter](#) is set, the number of filter results is shown here.



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

Open the role data sheet by clicking the  icon.

On this Page:

- [Editing Role Data](#)
 - [Changing the Role's Name](#)
 - [Deactivating a Role](#)
 - [Managing Users](#)
 - [Deleting Users](#)
 - [Adding Users](#)
 - [Editing Users](#)
 - [Managing Translations \(BPaaS\)](#)

Related Pages:

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

Related Documentation:

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

← → Edit Role

Master Data

☒ Role active

Name
acme_manager

Description
Role for all ACME managers

User (10)

ASSIGN MORE

Last Name	First Name	Login		
Adler	Irene	irene.adler	✕	↗
Marple	Jane	jane.marple	✕	↗
Watson	John	john.watson	✕	↗
Doolittle	Eliza	eliza.doolittle	✕	↗
West	Raymond	raymond.west	✕	↗

Translations

German
Vorgesetzter

English
Manager

French

Meta

UUID
c0b466b0-4bd4-11e9-88ed-21f8a9cbbef8

Created at
04/10/2019

Modified at
04/10/2019

Modified by
3fbc4fdf-cd48-44a3-b2b1-8449ba4ecc4c

CREATE A COPY

SAVE

CANCEL

Now you can rework the settings saved in the role data sheet.

You can...

- ... change the role's name.
- ... deactivate the role.
- ... delete, assign or rework the users that are assigned to the role.
- ... manage the translations of the role.

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

Saved successfully! acme_manager

If you save the data, the data sheet closes and a message **Saved successfully!** appears in the list of roles.

You can use the displayed link to reopen the role data sheet.

Changing the Role's Name

Master Data

☒ Role active

Name
acme_manager

Description
Global Role! Assign to all ACME managers

CREATE A COPY SAVE CANCEL

Overwrite the content in the **Name** field to change the identifier of the role.

You can also change the **Description**.

Click **Save** to store your modifications, use **Cancel** to close the data sheet without saving.

Deactivating a Role

You can disable a role. Inactive roles will still be displayed in the list of roles and you can still assign them to users in the user management.



Behavior in BPaaS

Once a role has been deactivated, it cannot be used in the BPaaS editor anymore: In the **BPaaS role wizard** only active roles are displayed.

← → Edit Role

Master Data

☒ Role active

Name
acme_manager

Description
Global Role! Assign to all ACME managers!

CREATE A COPY

SAVE

CANCEL

If you want to disable a role, open the role's data sheet.

Untick checkbox **Role active** in the **Master Data** section and save your modification.

← → Show Roles

acme (5) ✕ 🔍

#	Name	Activated
1	acme_employee	Yes
2	acme_facility	Yes
3	acme_manager	No
4	acme_ceo	Yes
5	acme_advisor	Yes

Saved successfully! [View details](#)

The message **Saved successfully!** confirms that the data has been saved. You can use the displayed link to reopen the data sheet.

In the content area, the roles list is displayed and the modified role shows the information **No** in column **Activated**.

>>

Roles (3)

ASSIGN MORE

Profiles (7)

Name

head_production

acme_employee

acme_manager

x

x

x

Even if inactive, you can still assign the role to a user and the role will be listed in the **Roles** section of a [user data sheet](#).

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Managing Users

The second section of a role data sheet shows the **users** that are currently assigned to the role. Go to this section to delete, assign or rework users.



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

Deleting Users

User (10)

ASSIGN MORE

Last Name	First Name	Login		
Adler	Irene	irene.adler	✕	🔗
Marple	Jane	jane.marple	✕	🔗
Watson	John	john.watson	✕	🔗
Doolittle	Eliza	eliza.doolittle	✕	🔗

You can delete already assigned users by using the ✕ icon.

The role will then be removed from the user section.

Adding Users

User (10)

ASSIGN MORE

Last Name	First Name	Login		
Adler	Irene	irene.adler	✕	🔗
Marple	Jane	jane.marple	✕	🔗
Watson	John	john.watson	✕	🔗

Use button **Assign More** if you want to assign further users to the role.

acme_manager - Assign Users

david

(2) ✕ 🔍

#	Last Name	First Name	Login	Company	Valid until	Activated	
1	<input type="checkbox"/>	Copperfield	David	david.copperfield	ACME Corp.	12/31/2099	Yes
2	<input type="checkbox"/>	Stringer	David	david.stringer	ACME Corp.	12/31/2099	Yes

eliza.doolittle

henry.higgins

holden.caulfield

irene.adler

jane.marple

john.watson

leopold.bloom

raymond.west

APPLY

CANCEL

The list of available users will open.

Use the filter to search for the user you wish to assign.

In the footer you will find the users that have already been assigned to this role.

acme_manager - Assign Users

david (2) ✕ ▾

#	Last Name ▾	First Name ▾	Login ▾	Company ▾	Valid until ▾	Activated ▾
1	Copperfield	David	david.copperfield	ACME Corp.	12/31/2099	Yes
2	Stringer	David	david.stringer	ACME Corp.	12/31/2099	Yes

david.copperfield david.stringer eliza.doolittle henry.higgins holden.caufield irene.adler jane.marple john.watson leopold.bloom raymond.west

APPLY CANCEL

Use the checkboxes to assign further users.

The chosen users are added in the list in the footer.

Click **Apply** to assign the chosen users to the role. Click **Cancel** to discard your choice.

User (10) ASSIGN MORE

Last Name ▾	First Name ▾	Login ▾	
Higgins	Henry	henry.higgins	✕ ↗
Bloom	Leopold	leopold.bloom	✕ ↗
Caufield	Holden	holden.caufield	✕ ↗
Copperfield	David	david.copperfield	✕ ↗
Stringer	David	david.stringer	✕ ↗

The chosen users are added to the **User** section of the role data sheet.


Don't forget to save the data sheet before closing it.

User (10)

ASSIGN MORE

Last Name	First Name	Login		
Adler	Irene	irene.adler	✕	🔗
Marple	Jane	jane.marple	✕	🔗
Watson	John	john.watson	✕	🔗
Doolittle	Eliza	eliza.doolittle	✕	🔗

Administrators can also use the **User** section to switch directly to the corresponding user data sheet to [edit a user](#).

To do so, click the  icon.

↔ Edit User

Master Data

First Name

Jane

Last Name

Marple

E-Mail

jane.marple@acme-corp.com

Company

ACME Corp.

Valid from

04/10/2019

✕

📅

Valid until

12/31/2099

✕

📅

☒ User active

Login

jane.marple

Language Selection

English


CREATE A COPY

CHANGE PASSWORD

SAVE

CANCEL

The corresponding user data sheet will open and you can edit the user data.



Don't forget to save the data sheet before closing it.

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**. This applies only to usage with BPaaS.

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

<div>Select Role<div><div>Select role<div>Search<div>acme</div></div><div><div>acme_advisor<div>techn.: acme_advisor</div></div><div>Management<div>techn.: acme_mgr<div>Role for ACME Corp. (Doku)</div></div><div>Employee<div>techn.: acme_employee<div>Default role for all ACME employees</div></div><div>Facility Management<div>techn.: acme_facility<div>Role for ACME Corp. (Doku)</div></div><div><div>Manager<div>techn.: acme_manager<div>Role for ACME Corp. (Doku)</div></div></div><div>Create a new role</div></div><div>Users with selected role<div><div>Copperfield, David<div>david.copperfield</div></div><div>Stringer, David<div>david.stringer</div></div><div>Doolittle, Eliza<div>eliza.doolittle</div></div><div>Higgins, Henry<div>henry.higgins</div></div><div>Caulfield, Holden<div>holden.caulfield</div></div><div>Adler, Irene<div>irene.adler</div></div><div>Marple, Jane<div>jane.marple</div></div><div>Watson, John<div>john.watson</div></div><div>Bloom, Leopold<div>leopold.bloom</div></div><div>West, Raymond<div>raymond.west</div></div></div></div><div>Saved<div>SAVE</div><div>CANCEL</div></div></div></div></div></div></div></div></div>	When a design user creates a role in the BPaaS editor, the role wizard shows the technical name of the role as well as the saved display name.
<div><div>Process starts.<div>Event</div></div><div>Manager<div>Role</div></div><div>Step 1<div>Function</div></div><div>Control form<div>Responsive Form</div></div></div>	The Role element in the BPaaS editor displays the name according to the language selected for the BPaaS user interface.

