

Creating Role-based Apps

Creating a Role-based App in three Steps

You can create a role-based app in three steps:

1. [Modeling the Process and Defining Roles](#)
2. [Assigning Users to Roles](#)
3. [Creating Process Apps and Activating the Role Check](#)

The example of ACME's Procurement Process shows what a roll-based app can look like.



When modeling role-based apps, also note the general information on page [Role-based Authorization Concept](#).

Step 1: Modeling the Process and Defining Roles

	Irene Adler creates the app project Procurement within the project ACME Procurement Process.
	In the app project, she opens the Reference model .

On this Page:

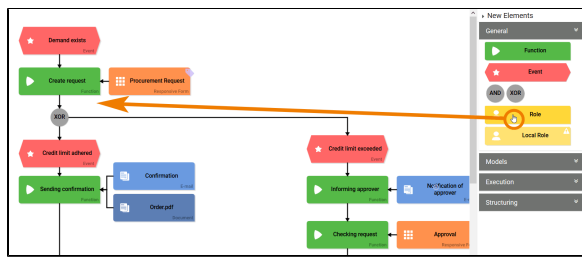
- [Creating a Role-based App in three Steps](#)
 - [Step 1: Modeling the Process and Defining Roles](#)
 - [Step 2: Assigning Users to Roles](#)
 - [Step 3: Creating Process Apps and Activating the Role Check](#)
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Related Pages:

- [Role-based Authorization Concept](#)
- [Creating Roles](#)
- [Role-specific Access Rights](#)
- [Modeling Processes](#)
 - [Role](#)
 - [Process App - Create](#)
 - [Process App - Overview](#)
 - [Organization Model](#)
 - [Modeling Conventions](#)
- [Executing Processes](#)
 - [Setting Search Filters Using Search Query](#)
- [Service](#)
 - [Procurement Process](#)

Related Documentation:

- [Administration Guide](#)
 - [Administering Users](#)
- [MOBILE \(German\)](#)
- [Support](#)
 - [Troubleshooting BPaaS](#)



Irene starts to model the procurement process. Since this is an approval process, she must define various roles.

Every employee should be able to execute the process step **Create request**, while process step **Checking request** should be executed exclusively by the accounting department.

In the **Sidebar New Elements**, Irene chooses the element **Role** from the category **General** and drags it to the workspace.

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

CREATE A NEW ROLE

CANCEL

The role wizard opens showing two options:

- Select role
- Create a new role

Since the procurement process is the first business process Irene is modeling, she decides to create a new role.

Procurement Process MASTER

The selected role name is already in use.

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

employee

Irene enters the role name **employee** and clicks the button **Create A New Role**.

At first Irene is surprised that she gets a warning, saying that her role name is already in use.

ACME Organization Chart

Management

Irene Adler

Production

Sales

Purchasing

Marketing

head_production

head_sales

head_purchasing

head_marketing

John Watson

David Copperfield

Lexgold Bloom

Henry Higgins

employee

employee

employee

Holden Caulfield

Jane Gallagher

Jane Eyre

Then Irene remembers that she has already created an employee role when she modelled the company's organizational chart.

Select Role

Select role

Search
emp

employee

technician, employee

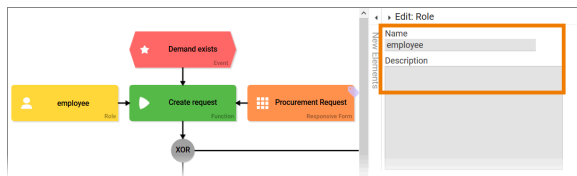
Create a new role

Users with selected role
None

SAVE
CANCEL

Irene switches to the **Select role** tab in the role wizard where she finds the already existing employee role.

She clicks on the role to select it. Since Irene has only created the roles in BPaaS so far, no users have yet been assigned to the role.



The role is created as an EPC element and can be placed in the model.

The properties of the role element (**Name** and **Description**) are only displayed in the sidebar. The editing must be done in the **Scheer PAS Administration**.

Select Role

Select role

Search

head_

head_accounting

techn.: head_accounting

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head_it

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head_marketing

techn.: head_marketing

head_production

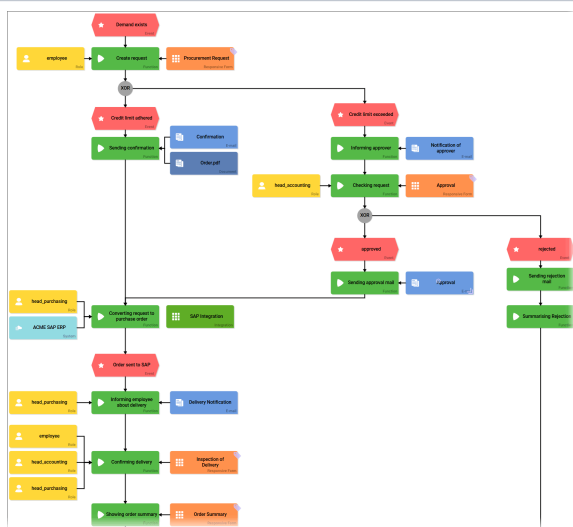
techn.: head_production

Create a new role

SAVE

CANCEL

For further modeling in the EPC, Irene now also uses the roles already created in the organization chart.



In the complete d EPC, Irene uses the following roles:

- empl oyee
- head _acc ounti ng
- head _pur chas ing

The modelled process in short:

An emplo yee files a procurement request. The system then automatically checks whether the credit limit has been exceeded or not.

- If the cost s are withi n the credi t limit, the orde r will be exec uted direc tly.
- If the cost s exce eded the credi t limit, the head_acco unting has to chec k and appr ove the orde r. If he appr oves , the orde r can be exec uted. If not, the empl o yee is infor med abou t the rejec tion.

	The head _purchasi ng executes the order and informs the emplo yee when the order has been delivered. When the delivery arrives, the emplo yee must check and confirm it. head_a ccounting and head _purchasi ng should also have insight in the form I nspection of Delivery. When everyone confirmed the order, the process ends.
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Irene Adler does not like the look of the technical identifiers of the roles in her EPC. She wants to display meaningful role names. Irene also wants to define some users to test the new app. In the next step, she therefore goes to the **Scheer PAS Administration** user interface.

Step 2: Assigning Users to Roles



Visit the [Administration Guide](#) for detailed descriptions of the configuration options in the **Scheer PAS Administration**.

Master Data

☒ Role active

Name
employee

Description

User (0)

No users are assigned to this role.



Irene logs in to **Scheer PAS Administration** and opens the datasheet of the role employee.

In the **User** window, she can assign the users who are to have this role.

Master Data

☒ Role active

Name
employee

Description
ACME Corp. role

User (3)

ASSIGN MORE

Last Name	First Name	Login		
Higgins	Henry	henry.higgins	✕	🔗
Adler	Irene	irene.adler	✕	🔗
Doolittle	Eliza	eliza.doolittle	✕	🔗

In the role's datasheet, Irene can also rework the name and enter a description.

Master Data

☒ Role active

Name
employee

Description
ACME Corp. role

User (3)

ASSIGN MORE

Last Name	First Name	Login		
Higgins	Henry	henry.higgins	✕	🔗
Adler	Irene	irene.adler	✕	🔗
Doolittle	Eliza	eliza.doolittle	✕	🔗

Translations

German
Mitarbeiter

English
Employee

French

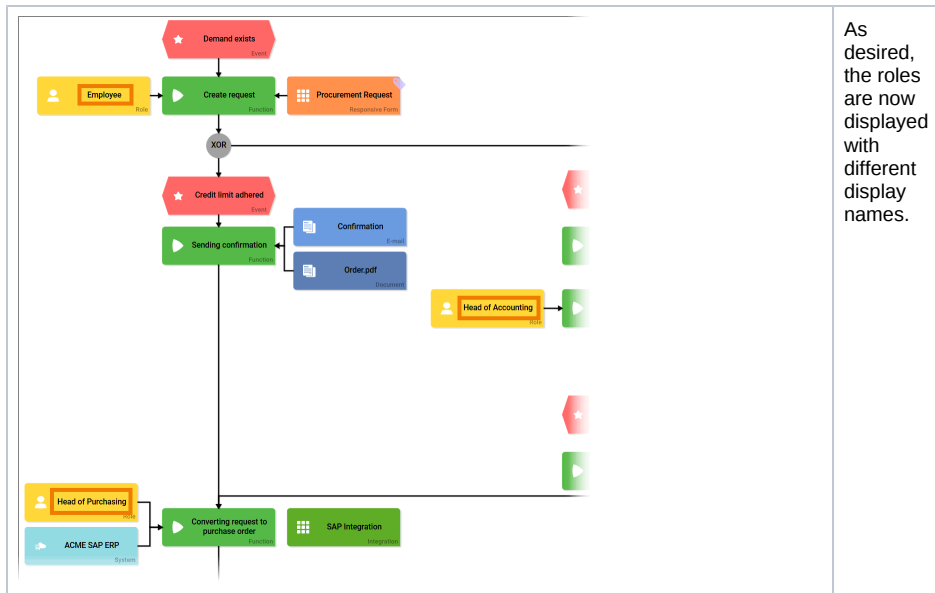
In section **Translations**, Irene is also able to enter display names for the EPC element that differ from the technical identifier.

The displayed name depends on the user language set in the user interface of **Scheer PAS BPaaS**.

Currently three languages can be used:

- German
- English
- French

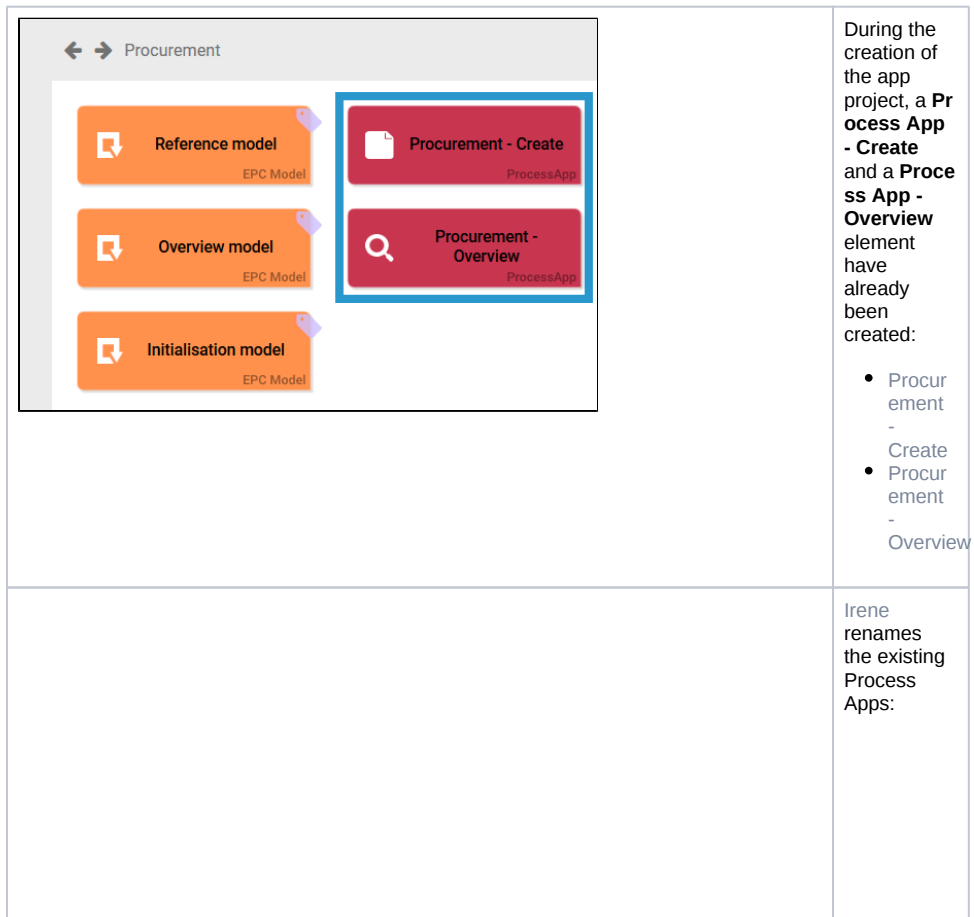
Irene inserts English and German translations for all roles and assigns suitable users to the roles. She then switches back to the BPaaS user interface.



Step 3: Creating Process Apps and Activating the Role Check

Irene must now create corresponding start links for each role in the app project to enable each role to access the process.

i The role check does not apply to overviews. Basically all users are allowed to open overviews. Create specific overviews for each role [using search queries](#) or restrict user rights [using the role rights option](#).



Start Links EMPLOYEE

Create Procurement Request

Procurement Requests Overview

Edit: ProcessApp

Name

Create Procurement Request

Description

Hashtags

☐ Hide in Cockpit
 ☒ Activate Role Check

Role For Link employee

Developer-Options

START

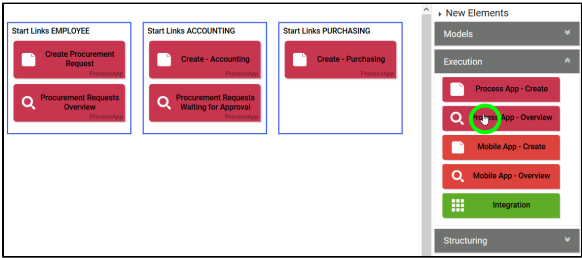
- Procurement - Create becomes Create Procurement Request
- Procurement - Overview becomes Procurement Requests Overview

Both elements should become start links for the employee:

- Irene activates the Role Check on the element Create Procurement Request
- In both elements she inserts employee in field Role For Link.

Use the technical identifier of the role as input in field **Role Link**.

In order to visually combine the two elements, Irène creates the frame **Start Links EMPLOYEE**.



For each additional role, a new **Process App - Create** and **Process App - Overview** are added.

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Create - Accounting
Process

Edit: ProcessApp

Name

Create - Accounting

Description

Hashtags

☐ Hide in Cockpit

☒ Activate Role Check

Role For Link

head_accounting

Developer-Options

START

Irene assigns the appropriate role to each start link and activates the role check at all **Process App - Create** elements.



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Create - Accounting

ProcessApp

Edit: ProcessApp

New Elements

Name

Create - Accounting

Description

Hashtags

☒ Hide in Cockpit

☒ Activate Role Check

Role For Link

head_accounting

Developer-Options

START

For start links that are not to be used by app users, you can also activate the **Hide in Cockpit** option. Users are then not able to create tiles for these links in the cockpit.

Example:

The head of accounting should intervene only if requests exceed the credit limit and have to be approved. Requests that are waiting for approval are displayed in the overview of role [head_accounting](#). The head of accounting therefore does not need the **Process App - Create** tile in his cockpit.

Therefore [Irene](#) can activate the **Hide in Cockpit** option for the element [Create - Accounting](#).

Expert
Advice

ADMIN Start Links without Role Check

ADMIN - New Procurement Request

ADMIN - Procurement Requests Overview

Edit: ProcessApp

Name

ADMIN - New Procurement Request

Description

Hashtags

#procurement

☐ Hide in Cockpit

☐ Activate Role Check

Role For Link

Developer-Options

START

Design users can not only use the app, but also edit it. For test purposes, it may be useful for the modeler to be able to run through all the steps of an app without having to change the user role.

To do so, create two "Designer start links" (**Create** and **Overview**) and deactivate the role check for these links. As a designer, you can now run through all process steps without having to create your own designer role.

If you also activate the option **Hide in Cockpit**, other users are not able to create tiles in the cockpit for the designer start links. This guarantees that only users with modeling authorization can run the app without role check.

Important note: When testing role-based apps, you should always test all start links and not just run the app as designer!

Now Irene Adler has made all the necessary settings:

- She added roles to the process steps in her EPC model.
- She created Process Apps for each role.
- She activated the role check for all Process Apps.
- Within the **Scheer PAS Administration** she assigned users to the roles.

Now the role-based app can be used by the different role owners.

Roles and Sub-EPCs

If an entire sub-EPK is to be executed by only one role, it is **not sufficient** to add the role only to the function with the sub-EPC. Roles must always be modeled within the sub-EPC itself.

