Role management

A **role** describes a specific **function** within a company (e.g. supervisor, HR department, apprentice support, etc.).
There are 2 use cases for the role in Webdesk EWP:

- Assignment of permissions for roles for program functions (display of certain information lists, certain application forms, ...)
- Performs a specific function in the workflow process (e.g. supervisor role approves leave request)

The role assignment also gives the user a defined access permission to certain areas (e.g. certain forms) and functions, such as information lists. These action permissions can be extended or restricted at any time. This is done by determining the **competence target** (defines who is allowed to be viewed):

- Access to ALL employees in the system
- Specific PERSON(S)
- Specific GROUP(S) or
- Specific CLIENT(s).

The role is assigned either via the role itself, via the person master sheet or via a group. The role also fulfills certain functions in the process flow (applications). Here, the **role holder** can perform defined activities, such as approving, rejecting or viewing an application.

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In contrast to organizational structures (groups, loose groups, cost centers), a role cannot be **evaluated**. This means that no information functions can take a role into account when querying information. To make this possible, the role holders would have to be grouped together in a loose group.

Competence target

A **competence target** is a person or group for which the role holder is responsible or which may be viewed.

There are 4 possibilities here:

- ALL,
- specific PERSON(S),
- specific GROUP(S) or
- specific CLIENT(S).

If the competence target is ALL, all employees of the company are viewed. It is possible to assign several competence targets at the same time.

Dynamic roles

In our experience, dynamic role filling is only used for the “colleague” role. This saves the selection of individual group colleagues by automatically filling all colleagues from a defined group dynamically into this role.

Determining the role holder at runtime

The **organizational type** of the role significantly determines the behavior when searching for role holders in workflows or when determining a deputy.

Possible organizational types of the role are:

- Hierarchical organizational structure (=hierarchical role)

- Loose group
- Cost center
- Project group

Specifically, the groups of the **defined organization type** are searched for possible role holders in the context of the current process author if there are no direct assignments.

The search for hierarchical role holders takes place in 2 phases:

1. Determination of all possible role holders
2. Reduction to the actual role holders, taking into account the sequence, maximum number of role holders and the deputy rule (this only applies to roles of the hierarchical organizational structure type)

The search for a role holder follows the following strategy; a meaningful ranking can only be made if this is really understood. Ranking alone is not sufficient for this.

Direct assignments are always the **strongest** factor: e.g. person A has the role R with the competence target person B. If this assignment is given, person A will always be in first place (the exception would be if there were several direct assignments, with person A having a lower ranking). The same also applies to groups, i.e. if there is a direct assignment of a **group G** to **person A**, all persons in *group G* are role holders with competence for *person B*.

Now there are two distinctions:

- Direct assignments exist
- No direct assignments exist

There is at least one direct assignment

After the direct assignments of the resulting set of role holders for a person B have been determined, the **dynamic role holders** are also added (at this stage, however, only those who do not have *All* as a competence target).

Now the assigned groups of the person are examined. (The direction of inheritance must be taken into account here.) If it is set that the hierarchical group is to be taken into account, the hierarchical group is examined (are there assignments, whereby the hierarchical group is the competence target) and then the direction of inheritance; otherwise the next level is immediately considered (depending on the direction of inheritance upwards, downwards or not at all).

There are no direct assignments

If there are no direct assignments, the **dynamic role holders** are examined and added to the result set. The groups (including the **hierarchical groups**, even if the flag is set not to take the hierarchical group into account) are then examined. The direction of inheritance must also be observed here.

Finally (valid for both variants)

Now the **dynamic role holders** with **competence target *All*** are added. The result is then extended to include general role holders (competence target All).

Search direction

The **search direction** determines the direction when searching for defined role holders (e.g. in a workflow process):

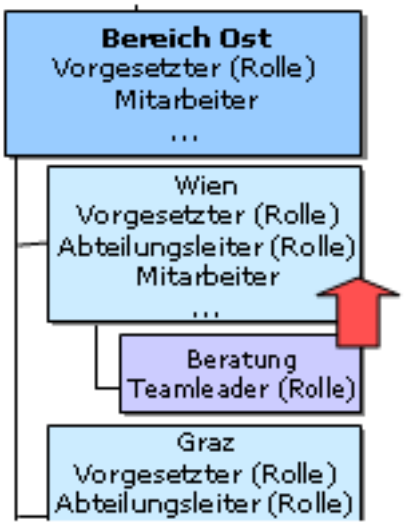
- upwards - useful when searching for the role of superior (search for superiors runs in the higher-level departments or groups)
- downwards - useful for sick notes (e.g. sick notes from colleagues within your own department and the departments below)
- none - search for role holder only takes place within own group or department.

Search direction none

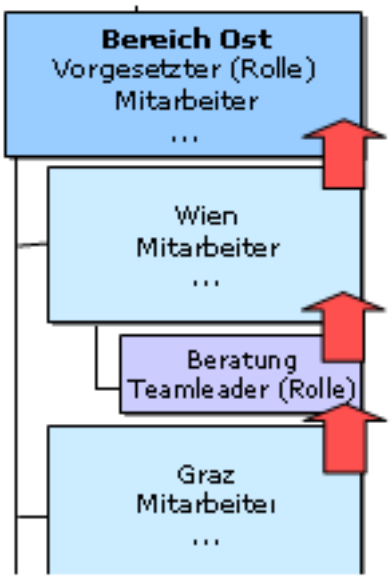
If the search direction is set to **“none”**, the search for a role holder only takes place within the group or department. The search is not continued outside the group/department. If there is no suitable role holder in the group/department, the process is stopped.

Search direction upwards

Starting from the group in which the applicant is located, the organizational chart is searched upwards for role holders of the role. As soon as a role holder is found, this is used as the role holder for the applicant's process (in this example, it is the role “Supervisor”).

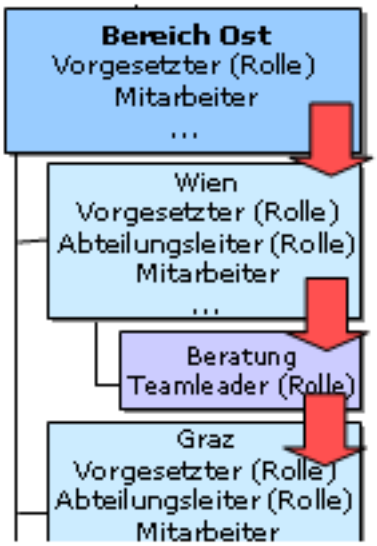


If there is no role holder in the parent group, the search continues until a role holder is found (in this example, the search is for the role of “Manager”):



Search direction downwards

Starting from the group in which the requester is located, the organizational chart is searched downwards for the role holder of the role. In the case of the sickness report, the organizational chart is searched for the role “Colleague”; all those who have the role “Colleague” are displayed.



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