

Maintaining Existing Roles

An existing role can be edited as needed by clicking the edit icon. This opens the detail view, where you can edit the role as desired.

The following **changes** can be made to an existing role:

- **Name**
Change the role name
- **Description**
Change or add a role description
- **Change the workflow ID**
By default, the workflow ID should not be changed (only after consultation with Workflow EDV GmbH)
- **Suppress requester as role holder for themselves**
Only relevant if the requester is also the role holder (e.g., a supervisor). When this parameter is activated, the request is sent to the next higher employee in the hierarchy.
- **Client**
Change the client
- **Organization type**
Change the organization type

In addition, changes are possible on the **Persons, Groups, and Actions** tabs. A detailed description of these tabs can be found under **Creating a New Role**.

Creating a New Role

To create a new role, click the "**New Role**" button bar and fill in the form provided. Then click the "Save & Close" button bar to return to the overview of all roles, or "Save" if you want to continue editing the form.

The process can be canceled at any time by clicking the "Delete" or "Back" button.

- **Name**
Name of the new role
- **Description**
Description of the new role
- **Workflow ID**
Serves as an internal reference for the approval process. It does not need to be filled in, since the workflow ID is set to the name of the role by default.
- **Suppress requester as role holder for themselves**
Only relevant if the requester is also the role holder (e.g., a supervisor). When this parameter is activated, the request is sent to the next higher employee in the hierarchy
- **Client**
Selection of the client for which the role is to apply
- **Organization type**
Selection of the organization type for the new role (for a detailed description, see **Creating a New Organizational Structure**). If you select Loose Groups, the role is not populated hierarchically, since there is no relationship between loose groups.

After a new role has been created, a confirmation from the server is displayed, and you automatically get the option to assign persons, groups, and actions to the new role by clicking the corresponding tab.

Persons Tab

On the **Persons tab**, specific persons are stored for a role. This person is responsible as role holder for All (the entire company), for a specific person, or for a specific group (selection of the **competence target**). The validity period (valid from – to) and the ranking within the role are also defined for the role holder.

Assigning Persons to a Role

To assign a specific person to a role, click the person selection and you get the alphabetically sorted list of persons. Select the desired person from this list.

Deleting Persons from Roles

On the Persons tab, role holders (persons) that have already been selected can also be deleted. To do so, activate the check box by clicking it. Then click "Save" or "Save & Close"

Selecting the Competence Target

Possible competence targets are Person, Group, All.

If you select a **group** as the competence target, an additional tab opens, from which you can select the desired group.

The same applies if you want to select a **person** as the competence target.

Groups Tab

On the **Groups tab**, specific groups are stored for a role. This group is responsible as role holder for **All** (the entire company), for a specific **person**, or for a specific **group** (selection of the competence target). The validity period (valid from – to) and the ranking within the role are also defined for the group as role holder.

The same conditions apply to the selection of the **competence target** for a group as on the **Persons tab**.

Actions Tab

The **Actions tab** allows you to assign the permission for various actions to the role holders and to define the validity period and the viewing permission.

The following parameters are available for defining the **viewing permission (default)**:

- **Own person**
Viewing permission for the own person only
- **Org unit**
Viewing permission for the own organizational unit (department)
- **Org unit + subordinate**
Viewing permission for the own organizational unit and all units subordinate to it
- **Role competence**
This viewing permission is defined in the role, which saves you from having to select groups or persons afterward. Here you can additionally specify whether the viewing permission is also inherited by subordinate groups.
- **Own client**
Viewing permission for all persons of the own client
- **All clients**
Viewing permission for all persons of all clients

Exceptions

Searching for a Role

To find a specific role, you can search by **name**, **description**, or **client**. To do so, fill in the desired field, click Search, and you get the desired role or a selection of similar roles.

Clicking the edit icon takes you to the detail view of the desired role.

Deleting a Role

To delete an existing role, select it from the overview and then click the "Delete" button bar. As a safety check, a popup appears asking whether this role should really be deleted. Clicking the OK button deletes the role, and it no longer appears in the role overview.