

User management

Assign a user role

Version 8.0



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Assign a user role

PRODUCTS: ALL CREATIO PRODUCTS

User groups in Creatio are called “**roles**”. You can assign organizational and functional roles to users in Creatio. Read more in “[User and role management, access permissions](#)”.

The assigned roles provide users with access to corresponding Creatio [data objects](#) and general [system-wide functions](#). You can specify several roles for a user.

NOTE. By default, Creatio assigns the “All employees” organizational role to the newly added users of the “Employee” type.

There are two ways you can assign roles to a user:

- From the user page
- From the role page

Method 1. Assign roles to a user from the user page


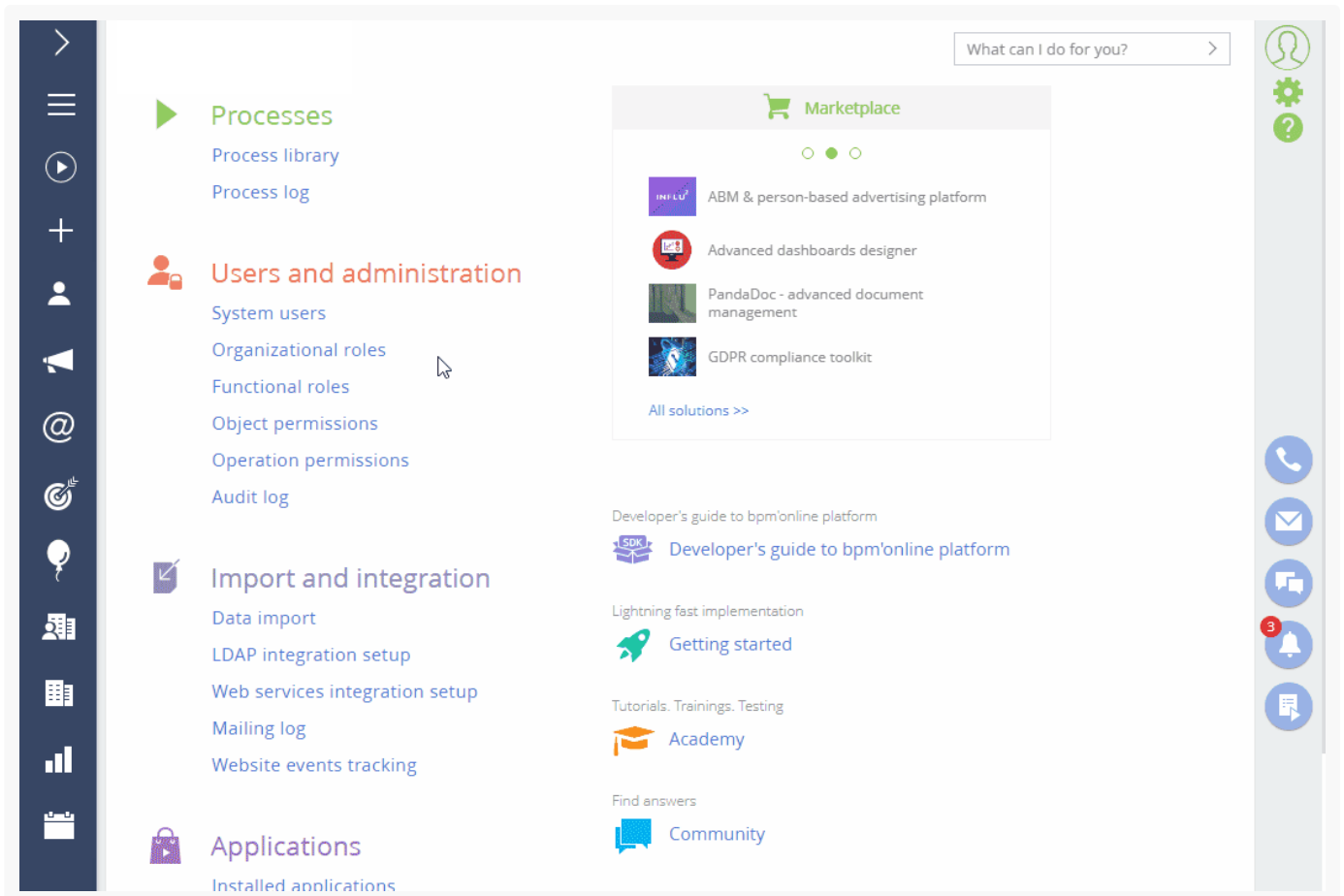
1. Click  → System Designer → [**System users**].
2. Open the user page → the [**Roles**] tab.
3. On the [**Organizational roles**] detail, click + and specify the roles from the company's organizational structure.
4. On the [**Functional roles**] detail, click + and specify the user's functional role. Functional roles are usually based on the user's job title ([Fig. 1](#)).

Fig. 1 Assigning roles to a user from the user page



As a result, the user will be granted all permissions relevant to the assigned roles.

Method 2. Assign roles to a user from the role page



1. Click  → [**Organizational roles**].
2. In the list of organizational roles (represented in the form of a folder tree), **select the corresponding organization and/or division**. This will bring up the selected role page to the right.
3. On the [**Users**] tab:
 - a. Click **+** and select [**Add existing**] to **add an existing user**. In the pop-up window, select the corresponding user ([Fig. 1](#)).
 - b. Click **+** and select [**Add new**] to **add a new user** assigned to this role (you will need to populate the new user page).
4. To assign a functional role to the user, switch to the [**Functional roles**] view by clicking , then **select the corresponding functional role**.
5. Repeat step 4 ([Fig. 1](#)).

Fig. 1 Assigning roles to a user from pages of the corresponding roles

The screenshot displays the bpm'online user management interface. On the left, a navigation menu includes 'Processes' (with sub-items 'Process library' and 'Process log'), 'Users and administration' (with sub-items 'System users', 'Organizational roles', 'Functional roles', 'Object permissions', 'Operation permissions', and 'Audit log'), and 'Import and integration' (with sub-items 'Data import', 'LDAP integration setup', 'Web services integration setup', 'Mailing log', and 'Website events tracking'). The 'Organizational roles' item is highlighted with a mouse cursor. The main content area features a 'Marketplace' section with a search bar 'What can I do for you?' and a list of solutions: 'ABM & person-based advertising platform', 'Advanced dashboards designer', 'PandaDoc - advanced document management', and 'GDPR compliance toolkit'. Below this, there are links for 'Developer's guide to bpm'online platform', 'Lightning fast implementation', 'Getting started', and 'Academy'. A vertical sidebar on the right contains icons for user profile, settings, help, and communication tools.

As a result, the user will be added to the corresponding roles and granted relevant permissions.