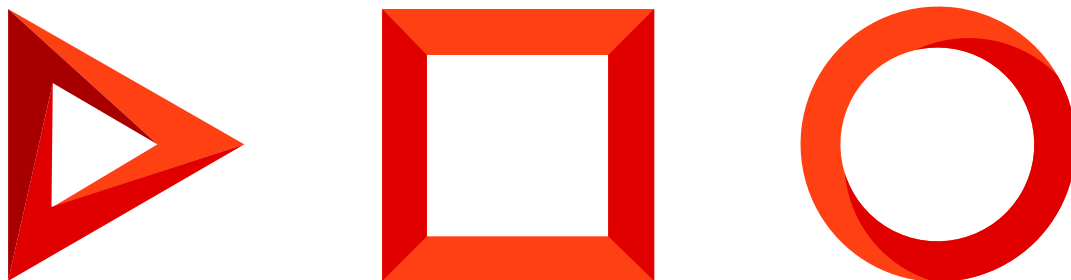


User management

Organizational roles

Version 8.0



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Organizational roles

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Organizational roles are user groups that represent company units, departments or subdivisions in the organizational structure, for example, the “Boston Office Sales Department” or the “Washington Office HR Department.” Each organizational role can be assigned access permissions that apply to all of its users. Organizational roles also automatically inherit access permissions from their parent organizational roles.

To manage organizational roles, click  → [*Organizational roles*].

The [*Organizational roles*] section contains the company’s organizational structure (represented in the form of a folder tree) and the information about individual organizational roles.

Note. By default, only system administrators have access to this section. Users need to have permission to the “Manage user list” (“CanManageUsers” code) system operation to work with this section.

Add an organizational role

1. Click  → [*Organizational roles*].
2. In the list of organizational roles, **select the corresponding parent role**. For example, an organizational role for the regional office.
3. Click [*Add*] and **select the role type**: “Organization” or “Division.” For example, create a “Marketing department” division for the regional office.
4. Enter the **name** of the role. The name of each organizational role must be unique.
5. Open the [*Functional roles*] tab and add functional roles. For example, “Marketing Manager,” “Copywriter,” etc. All users in these functional roles will obtain all permissions of the organizational role.

This step is optional.

Note. Alternatively, you can connect a functional role to an organizational role on the functional role page. Read more: [Connect functional and organizational roles](#).


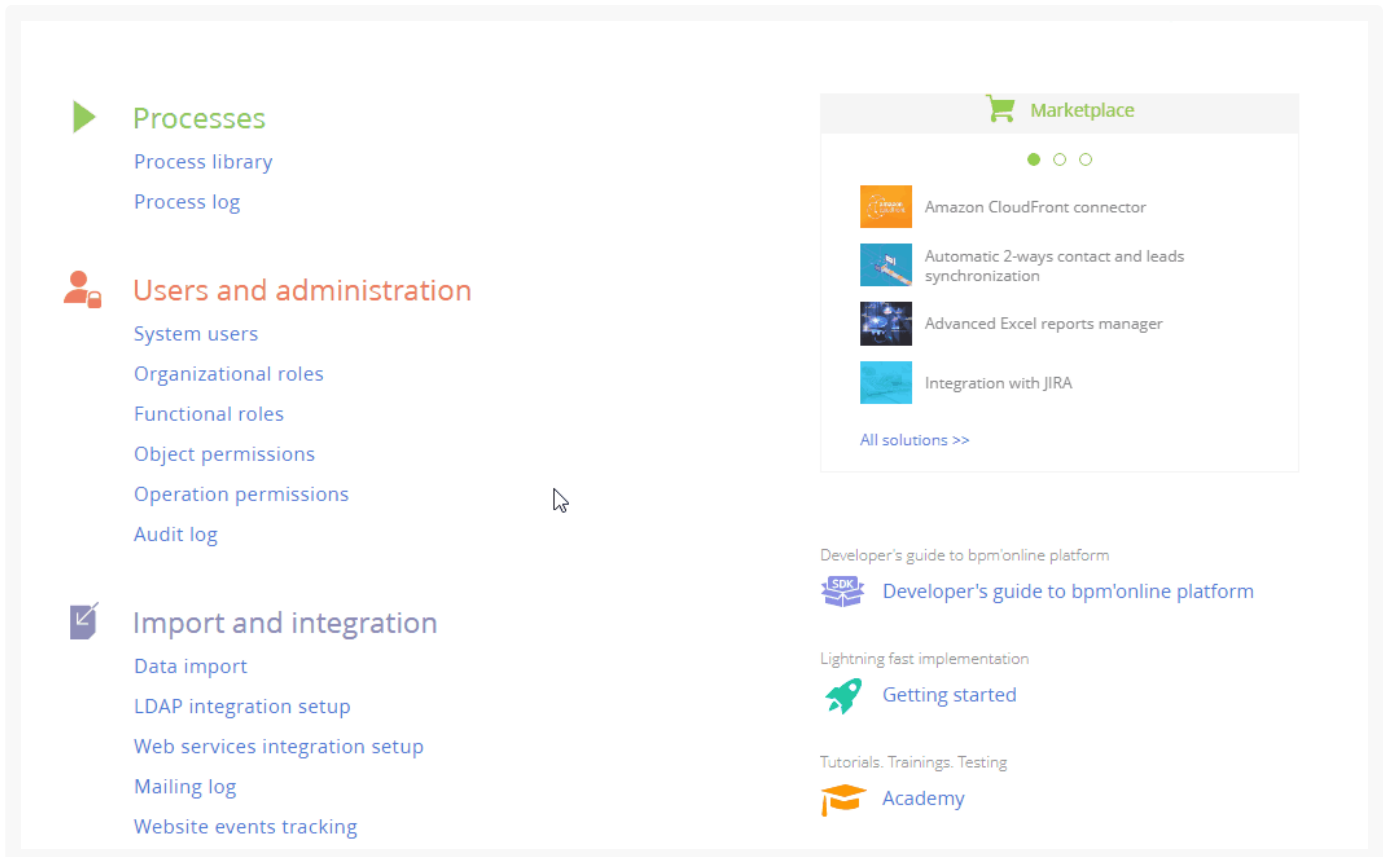
6. Click  → [*Update roles*] for changes to take effect (Fig. 1).

Fig. 1 Adding an organizational role



As a result, a new organizational role will be added to Creatio. It will automatically obtain the same access permissions as its parent organizational role.

Add a management role

Set up special access permissions for management staff by adding a **management role** to an organizational role. The management role exists as a standalone organizational role in Creatio and may have its own access permissions, but it is not visible in the list of organizational roles.

Management role inherits the subordinate role's access permissions automatically.

To add a management role:


1. Click  → [*Organizational roles*].
2. Select the corresponding organization and/or division to assign a management role in the list of organizational roles. For example, to assign a manager to the HR Department, select the “HR Department” role.
3. Select the [*Management role exists*] checkbox on the [*Managers*] tab.
4. Specify the name of the management role (Fig. 2) in the [*Management role*] field.

Fig. 2 Creating a management role for the “HR Department” organizational role

The screenshot displays the 'Organizational roles' management interface. On the left, a sidebar lists various roles, including 'All employees', '1st-line support', '2nd-line support', '3rd-line support', 'Accounting Department', 'CC agents', 'Finance', 'HR Department', 'Quick Books synchronization', 'Sales Department', 'System administrators', 'All portal users', and 'Alpha Business'. The 'All employees' role is selected. On the right, the 'All employees' role details are shown, including an 'ACTIONS' dropdown, a search field for 'Name*' with the value 'All employees', and tabs for 'USERS', 'MANAGERS', 'FUNCTIONAL ROLES', and 'ACCESS'. The 'USERS' tab is active, showing a 'Synchronize with LDAP' checkbox and an 'LDAP element' search field. Below this, a table lists users assigned to the role:

Contact	Job title
John Best	Head of department

5. Take the following steps on the [*Managers*] tab:

- Click **+** and select [*Add existing*] to **add an existing user**. Select the corresponding user in the pop-up box (Fig. 3).
- Click **+** and select [*Add new*] to **add a new user** assigned to this role. You will need to fill out the new user page.

Fig. 3 Adding users to the “HR Department” management role

As a result, the management role will be added to the organizational role. The users that have the management role will obtain all access permissions of the role, including permissions inherited from the subordinate role (e. g., “HR Department”).

Note. Learn more about access permissions: [Object operation permissions](#), [Record permissions](#), [Column permissions](#), [System operation permissions](#).

Add users to an organizational role

You can create a list of users in an organizational role in any of the following ways:

- add an existing user (selecting a user from the list)
- add a new user via a new user page
- import LDAP users

Attention. You can import LDAP users only if the LDAP user integration has been set up. Learn more: [Set up LDAP synchronization](#).

All users added to the organizational role will inherit any access permissions configured for it.

To add users to an organizational role:


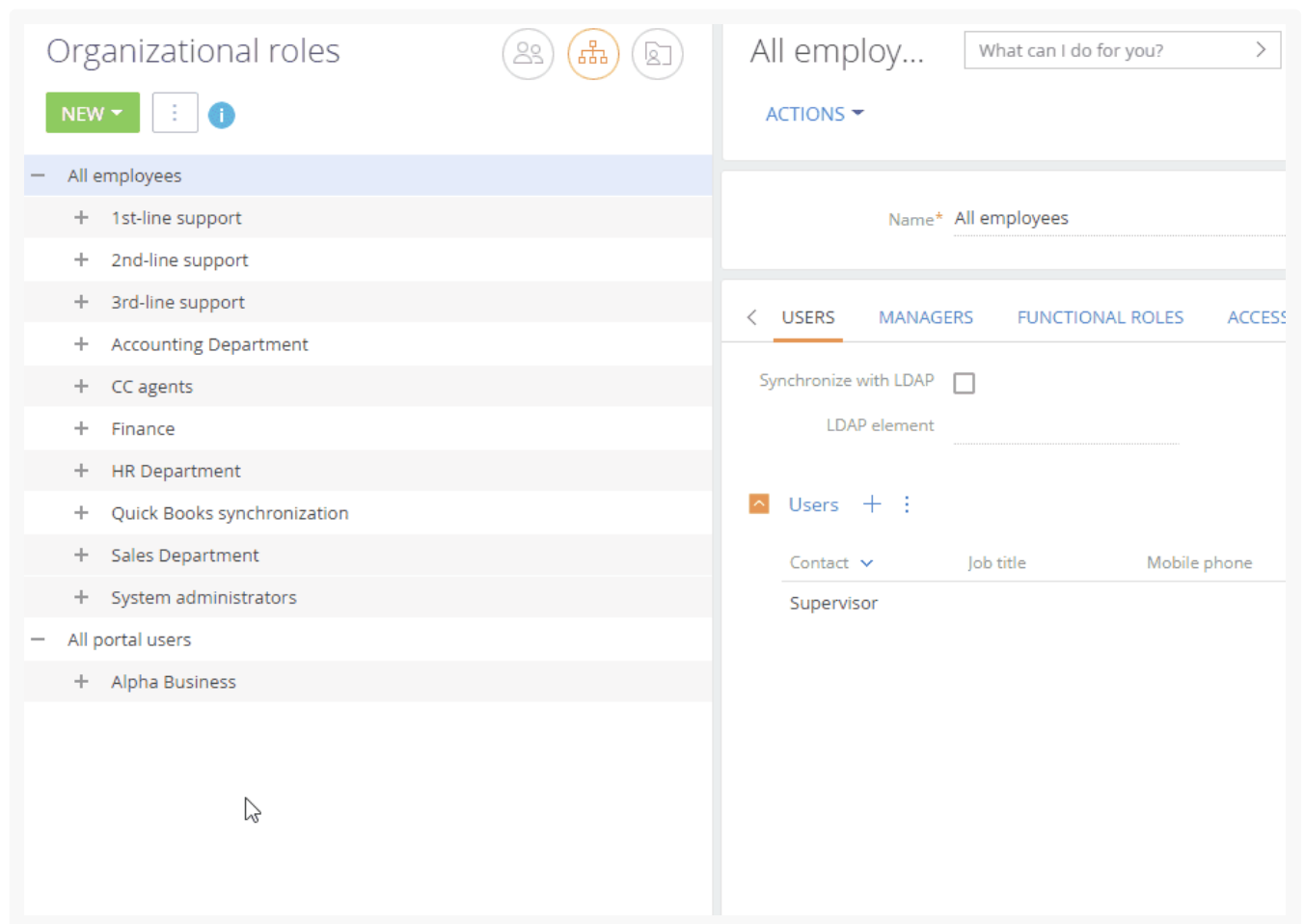
1. Click  → [*Organizational roles*].
2. **Select the corresponding organization and/or division** in the list of functional roles represented as a folder tree.
3. Take the following steps on the [*Users*] tab:
 - a. Click **+** and select [*Add existing*] to **add an existing user**. Select the corresponding user in the pop-up box (Fig. 4).
 - b. Click **+** and select [*Add new*] to **add a new user** assigned to this role (you will need to populate the new user page).

Fig. 4 Adding existing users to an organizational role



As a result, selected users will be added to the organizational role. The users will inherit any access permissions configured for the organizational role.

Note. Learn more about access permissions: [Object operation permissions](#), [Record permissions](#), [Column permissions](#), [System operation permissions](#).