Section 102

Tina5s Admin Guide - Roles

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Properties | **Roles** | Users | Categories | Project | Security Attributes | Devices | My Account | Controls | External Connectors | Workflow Templates

☐ Show Inactive R...

New Role ◀ **Click on the 'New Role' Button**

Role		escription	Status	System	Functional
AllUser	AllUser		Active	☑	☑
Document Control	Document Control		Active	☑	☑
Engineering	Engineering		Active	☑	☑
HR	HR		Active	☑	☑

Provide information in the following fields:

Role – this term is used internally by Tina and will not be shown anywhere else but here.

Label – this term will be used to populate pick lists elsewhere in Tina. Labels should be short, and familiar to your users.

Description – this term will not be shown anywhere but here. Use a description as required to clarify what the role is.

Set status to active

Click on the '+' icon to add users to the role

Choose the users to be added to the role (only active users will be listed)

Click on the 'Add' button

Click on the 'Save and Close' button – the new role will be created and added to the list of active roles

After saving, the new role may be applied at the category level or on individual documents.

Inactivate a Role

Click on the role to be inactivated — ①

Choose 'Inactive' from the picklist — ②

Save and close — ③

After inactivation, Tina will do the following:

1. The role will become inactive and will no longer show in the active roles grid in the Admin/Roles tab

2. The security settings for all categories and all documents will be automatically updated to reflect the inactivation (i.e. the role will be removed)

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Properties | Roles | Users | Categories | Project | Security Attributes | Devices | My Account | Controls | External Connectors | Workflow Templates

☑ Show Inactive Roles

1 Check the 'Show Inactive Roles' box

		Desc		Status	System	Functional
Inactive	☑	☑
		All Ac		Active	☑	☑
Managers	Managers			Inactive	☑	☑
HR	HR	Huma		Active	☑	☑
Document Control	Document Control	Docu		Active	☑	☑
Shop Floor	Shop Floor			Inactive	☑	☑
Engineering	Engineering	Engin		Inactive	☑	☑
Civil D&D	Civil Design & Drafting	Civil D		Inactive	☑	☑

Edit Role ⊗

Role: Civil D&D

Label: Civil Design & Drafting

Description: Civil Design & Drafting Group

Two Factor: ☐

Status: Inactive ▾

Select Role Status
Active
Inactive
Gwen Stacy ✖
Peter Parker ✖

Save | Save And Close | Cancel

2 Click on the role to be activated

3 Choose 'Active' from the picklist

4 After activating, the role may be applied at the category level or on individual documents.

Save and close