

## Section 102

### Tina5s Admin Guide - Roles

[Create a New Role](#)

[Inactivate a Role](#)

[Reactivate an Inactive Role](#)



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# Create a New Role

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

Show Inactive Roles

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

Role	Description	Status	System	Functional
<a href="#">AllUser</a>	AllUser	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Document Control</a>	Document Control	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Engineering</a>	Engineering	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">HR</a>	HR	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## Create a New Role (Cont'd)

1 2 3

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.

4

Set status to active

5

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

Role	Label	Descr
AllUser	AllUser	
Document Control	Document Control	
Engineering	Engineering	
HR	HR	

New Role

Role: Civil D&D

Label: Civil Design & Drafting

Description: Civil Design & Drafting Group

Two Factor:

Status: Active

Add User To Role

Save Save And Close Cancel

## Create a New Role (Cont'd)

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

2 Click on the 'Add' button

Role	Label	Descr	Status	System	Functional
AllUser	AllUser		Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Document Control	Document Control		Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Engineering	Engineering		Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
HR	HR		Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Select Users	
<input type="checkbox"/>	
<input checked="" type="checkbox"/>	gwen.stacy197601@gmail.com
<input type="checkbox"/>	jonah.jameson197601@gmail.com
<input type="checkbox"/>	manjane.watson197601@gmail.com
<input checked="" type="checkbox"/>	peter.parker197601@gmail.com

## Create a New Role (Cont'd)

The screenshot shows a software interface with a 'New Role' dialog box open. The dialog has the following fields and options:

- Role: Civil D&D
- Label: Civil Design & Drafting
- Description: Civil Design & Drafting Group
- Two Factor:
- Status: Active

Below these fields is a table titled 'Add User To Role' with a '+' icon to add more users:

Full Name	
Gwen Stacy	✕
Peter Parker	✕

At the bottom of the dialog are three buttons: 'Save', 'Save And Close', and 'Cancel'. An orange arrow points to the 'Save And Close' button.

Two blue callout boxes provide additional information:

- 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

Choose 'Inactive' from the picklist

Save and close

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)

Role	Label	Description	Status	System	Functional
AllUser	AllUser	All Access	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Civil D&D	Civil Design & Drafting	Civil Design & Drafting Group	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Document Control	Document Control	Document Control	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Engineering	Engineering	Engineering	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Human Resources	Human Resources	Human Resources	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## Re-activate an Inactive Role

1 Check the 'Show Inactive Roles' box

2 Click on the role to be activated

3 Choose 'Active' from the picklist

4 Save and close

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

Status	System	Functional
Inactive	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Inactive	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Inactive	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Inactive	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Inactive	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Role	Label	Description
Civil D&D	Civil Design & Drafting	Civil Design & Drafting Group

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