Role Management page

The Role Management page contains both pre-existing and custom roles within the Teamwork Cloud (TWCloud) system (see Types of roles for more information about each type). The roles are sortable in ascending or descending alphabetical order. The details of each role such as the permissions and assignments are viewable on the Role detail page, which opens every time you click the role name.

USERS REPOSITORY ROLES LDAP SETTINGS	Support
Teamwork Cloud	
Role Management	
You can use roles to associate users/groups with specific resources or global operations. The table below shows all the roles that are available in the server. Use this screen to create, edit, manage assignments or delete roles.	
😌 Create new role 🎄 Copy Role Assignment	arch by role name × P
Role *	Action
Administer Resources	Edit 💌
Edit Resource Properties	Edit 💌
Edit Resources	Edit 💌
Manage Model Permissions	Edit 💌
Manage Owned Resource Access Right	Edit 💌
Read Resources	Edit 💌
Release Resource Locks	Edit 💌
Remove Resource	Edit 💌
Resource Contributor Resource-specific role. Users who are assigned to this role can modify content of selected resource.	Manage Assignment
Resource Creator Global or category-specific role. Users who are assigned to this role can add resources to the server including the ability to categorize them, create new categories or manage ex	xisting ones. Manage Assignment
Resource Locks Administrator Resource-specific role. Users who are assigned to this role can release other users locks of selected resource.	Manage Assignment
Resource Manager Resource-specific role. Users who are assigned to this role have full permission to manage selected resource, including the ability to grant permissions to other users.	Manage Assignment
Resource Reviewer Resource-specific role. Users who are assigned to this role can open resource, and navigate through the content to review it.	Manage Assignment
Security Manager Global role. Users who are assigned to this role can grant permissions for server users, including the ability to specify a granted scope.	Manage Assignment
Server Administrator Global role. Users who are assigned to this role can configure server settings, including the ability to configure LDAP integration, secured connection or server licensing.	Manage Assignment
User Manager Global role. Users who are assigned to this role can create and manage users in a server.	Manage Assignment

All user roles created in TWCloud listed on the Role Management page.

A pre-existing role is a fixed role that you cannot edit, but you can assign it to one or more users. You can add a custom role to suit your or your organization's needs or modify it as desired. When you assign a role to a user, the permissions associated to that role will be automatically given to the user.

The Role Management page allows you to:

- Create a new role.
- Copy role assignments from one user to another.
- Open the Role detail page where you can:
 - View user role details.
 - Delete a user role.
 - View users or resources assigned to the role.
 - Assign more users or resources to the role.
 - Remove users or resources from the role.
 - Add and delete permissions.

The following table describes the UI components of the Role Management page in detail.

UI Components	Description
Role	This column shows a user role's name in the TWAdmin.The name is hyperlinked so you can click it and view the role's details, edit it, or manage the role or resource assignments.
Edit	The Edit button in the Action column allows you to edit a user role's information, change the permissions, add assignments.

V	The arrow button contains the delete button that allows you to delete a user role.
Co Delete	
Manage Assignment	This button opens the Role detail page.
Create new role	This button creates a new TWCloud user role. See Creating roles for more information.
Assignment	This button copies roles and resource assignments from one user to another.
Search by role name × P	You can use this search box to find a user role by typing a keyword. TWAdmin will run the search and find matching role names.

Role detail page

The Role detail page opens after you click a user role, the Edit, or Manage Assignment button on the Role Management page. Besides allowing you to view, add, delete, or edit a user role (custom roles only) and its permissions, the Role detail page enables you to:

- Assign roles to a user, a resource, or a user group.
 Delete a user from the role.
 See all users assigned to the role.

USERS	REPOSITORY	ROLES	LDAP SETTING	GS		Sup	port
	Teamwork	Cloud	С	Search			3.
🗢 Ba	ck						-
Rol	e detail						
Nan	ne:	Resource	ce Contributor				
Des	cription:	Resource	ce-specific role. Users	who are assigned to	this role can modify (content of selected resource	•
Assi	igned Permissions:*	Edit R	esource Properties esources Resources				
F	Role Assignments —						
	🔁 Add						
	Matrix Criteria						
	All Resources	•	Swap	v	Search Clear		
			Swap				
			_	Case studies			
	Username/Group ≜		Scope	🕞 Inventory Contr	activity diagram	💼 class diagram	
6	∃ External User						
	🔉 admin		Global O Custom				
6	∃ Internal User						
	Administrator		Global 💿 Custom				
	🔏 EmmaWH		Global 💿 Custom				
	🔏 Kiim		Global O Custom				
	R P1		Global O Custom				
	🔉 aa		Global O Custom				
	🔓 bat		Global O Custom				
	A Page 1	of 1 🕨	Displaying 1 - 14 o	of 14 🕕 Colum	nn Paging: Display 20 pro	ject column(s) per page	
						Save	

The Role detail page contains specific information about a role such as the permissions and the assignments and also allows adding assignments to the role.

Note

- Only a Security Manager can see complete information about each user role on the Role detail page.
- You cannot edit pre-existing roles and their permissions.

The following table explains the UI components of the Role Assignments pane of the Role detail page.

Property	Function		
🗘 Add	The Assign button opens the Add Users dialog, which contains a list of usernames that you can select and assign to the role.		
Matrix Criteria			
All Resources	Swap Search Clear		
Resource filter box	To allow you to filter the resources that match an entered name.		
All Resources All Resources Document Project	 All Resources Document Project 		
User directory filter box All All External User Internal User User Group	To allow you to filter users from a specific user directory or all directories. You can select one out of three available options: All External User Internal User User Group 		
Swap	 To determines the order of data in a row and column matrix. You can choose either: All Resources (rows) to All/External User/Internal User directory (columns). All/External User/Internal user/User Group directory (columns) to All Resources (rows). 		
Search	To start searching for a resource or a username.		
Clear	To clear search results.		
Username column	To list all internal and external users to whom the role has been assigned together with resources.		
	To remove a user from the current role.		
Scope column	 To allow you to select either: Global scope: This scope extends the role's permissions on all server-related resources in the TWCloud system. Custom scope: The role's permissions are limited and are valid only for selected resources. 		

Resource Column	To list all resources in each directory and check boxes. You can assign a resource to a user by selecting the check box. Depending on your role, you may see only the resources in which you have permissions. Unless you select Custom as the scope of the role, you cannot assign users or resources.	
Save	To save changes made to role.	

You can filter a resource and/or a username in the **Matrix Criteria** pane. The search results will appear below the filter box(es) in a matrix table. This contextual matrix is based on the row and column criteria. It means that data in the matrix is arranged based on the resource name and the username criteria that you select from the filter box.

an for a sign a role to a user or remove it by using the Role Assignments section in either the Role detail or the User detail page. For more

information, see Assigning roles.

Related pages

- Types of rolesScopes of rolesPermissions