Section 102
Tina5s Admin Guide - Roles

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TINA

Create a New Role

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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		Description	Status	System	Functional
AllUser	AllUser		Active	☑	☑
Document Control	Document Control		Active	☑	☑
Engineering	Engineering		Active	☑	☑
HR	HR		Active	☑	☑

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☐ Show Inactive Roles

New Role

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

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.

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

4 **Set status to active**

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

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☐ Show Inactive Roles

New Role

Role	Label	Descr			Status	System	Functional
AllUser	AllUser				Active	☑	☑
Document Control	Document Control				Active	☑	☑
Engineering	Engineering				Active	☑	☑
HR	HR				Active	☑	☑

New Role

Select Users

☐ [_____]

☑ gwen.stacy197601@gmail.com
☐ jonah.jameson197601@gmail.com
☐ maryjane.watson197601@gmail.com
☑ peter.parker197601@gmail.com

Add

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

Save   Save   Cancel

2 Click on the 'Add' button

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☐ Show Inactive Roles

New Role

Role	Label	Descr			Status	System	Functional
AllUser	AllUser				Active	☑	☑
Document Control	Document Control				Active	☑	☑
Engineering	Engineering				Active	☑	☑
HR	HR				Active	☑	☑

New Role

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

Two Factor ☐

Status [Active ▾]

Add User To Role ⊕

Full Name	
Gwen Stacy	✖
Peter Parker	✖

[Save] [Save And Close] [Cancel]

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.

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☐ Show Inactive Roles

New Role

Role	Label	Descr...		Status	System	Functional
AllUser	AllUser	All Ac...		Active	☑	☑
Civil D&D	Civil Design & Drafting	Civil D...		Active	☑	☑
...ent Control	Document Control	Docu...		Active	☑	☑
		Engin...		Active	☑	☑
		Huma...		Active	☑	☑

① Click on the role to be inactivated

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)**

Edit Role

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

Select Role Status
Active
Inactive
Gwen Stacy ✖
Peter Parker ✖

② Choose 'Inactive' from the picklist

Save **Save And Close** **Cancel**

③ Save and close

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☑ Show Inactive Roles

1

Check the 'Show Inactive Roles' box

		Description			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