Roles

Administration Tool

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What is a role?

Like groups, roles are a set of users with common, similar or identical access rights. The difference is that roles are based on the fact that their members **share a same function**.

Using roles is only mandatory when working with Workflow processes. Indeed, the tasks are assigned to roles and not to users (physical people). To take part in a process, a user thus needs to belong to a role.

Example: You want to implement an inbound mail management process that will involve all the Administrative assistants. To do so, you need to create an "Administrative Assistant" role and assign all the corresponding users to it. The "Inbound mail" process entails to access the "Mail" and "Personal files" databases: it would be convenient to assign the "Administrative Assistant" role to both databases instead of assigning each user to them one by one.

The users belonging to a same role can share:

- Gargantua privileges in order for the role members to see - and then use - specific Gargantua features from the Web client;
- Assignments to Gargantua databases in order for the role members to see them and access their contents even though they are private, to the extent of the privileges and access rights they have been granted;
- Assignments to groups in order for the role members to have all the access rights set for these Gargantua user groups;
- A custom, and possibly customizable, interface settings profile.

Creating a role

To create a new role, proceed as follows:

1. In the left pane of the Administration Tool, click the **Roles** branch.

   The **Manage roles** screen displays in the right pane.

2. In the bottom left corner of the right pane, click the **New** button.

   The **New role** dialog displays.

3. In the **Role name** field, type the name that you want to give to the role.

   Example: "Administrative Assistant".

4. In the **Role description** field, you can type a description of the role.

   Example: "This groups gathers all the administrative assistants in charge of processing inbound mail."

5. In the **Access level** field, you can choose the access level of the role.

6. Click the **Add** button to close the dialog.

   The new role has been created. The corresponding management screen (**Manage role**) displays in the right pane.

7. You can now define privileges and assignments for the group, and then click the **Apply** button at the bottom of the right pane.

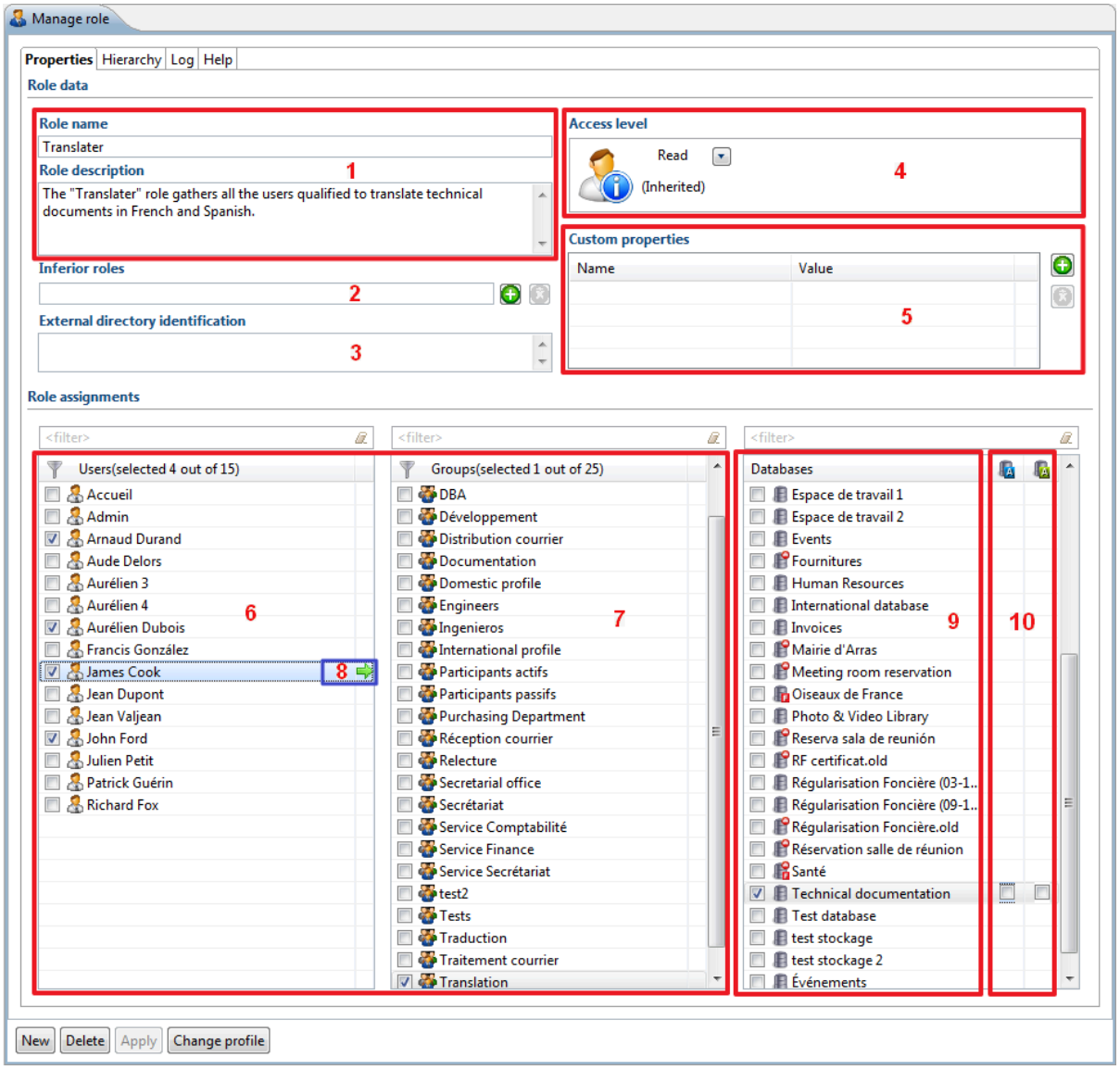
Role management screen - Available tabs

The role management screen contains the following tabs:

- The **Properties** tab allows to define the roles main settings, to grant him privileges, and to assign him to different users, groups and Gargantua databases.
- The **Hierarchy** tab allows to display the hierarchy of the configured roles, according to the importance granted to each of them.
- The **Log** tab allows to view the list of all the operations performed on the role, and to filter them according to some criteria.
- The **Help** tab allows you to access the contextual help.

"Properties" tab

The **Manage role** screen is as follows:



1. Fields containing basic information about the role (provided in the dialog when creating the role);
2. Field allowing to assign inferior roles to the selected role, with the button;
3. Field containing the LDAP ID of the role, if you are using an LDAP directory to create and manage your Gargantua users;
4. Role access level, as defined at its creation. If the **Custom** access level is selected, then the **View privileges** option of the drop-down menu allows you to assign to the role all or part of the access privileges to the Web Client features;
5. Area allowing to create and associate attributes to the role object (for example, to perform operations using scripts on objects with common characteristics);
6. Checkboxes allowing to select the users that will belong to the role;

7. Checkboxes allowing to select the groups that will belong to the role;
8. Arrow allowing to go directly to the selected user or group;
9. Checkboxes allowing to assign the role to one or more Gargantua databases;
10. Checkboxes allowing to assign the role to:
    - the explorer of the database (if a role is assigned to a database, but not to its explorer, the database contents remain accessible to its members, in particular from search features.);
    - the archive part of the database.

> ***These checkboxes only display when the group is already assigned to the database (active part).***

> ***The grayed checkboxes correspond to assignments inherited from a group the role belongs to. These affectations can be seen, but not modified at this level, which is why the corresponding checkboxes are inactive.***

"Hierarchy" tab

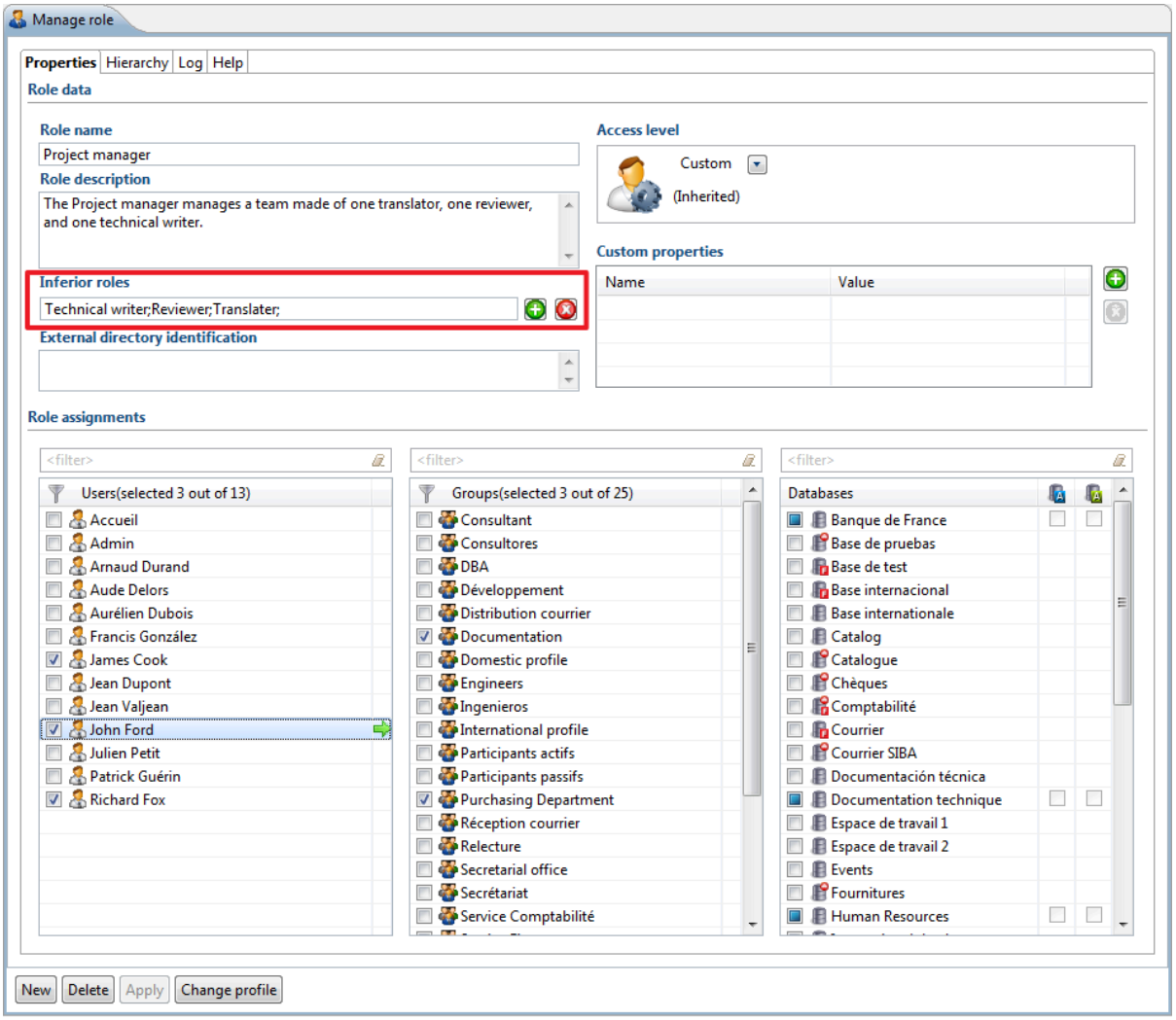
The **Hierarchy** tab allows you to display all the configured roles. To create a hierarchy between roles, you must assign them inferior roles.

For instance, a "project manager role" (said "main") will have as inferior roles the "technical writer", "translater", and "reviewer" roles.

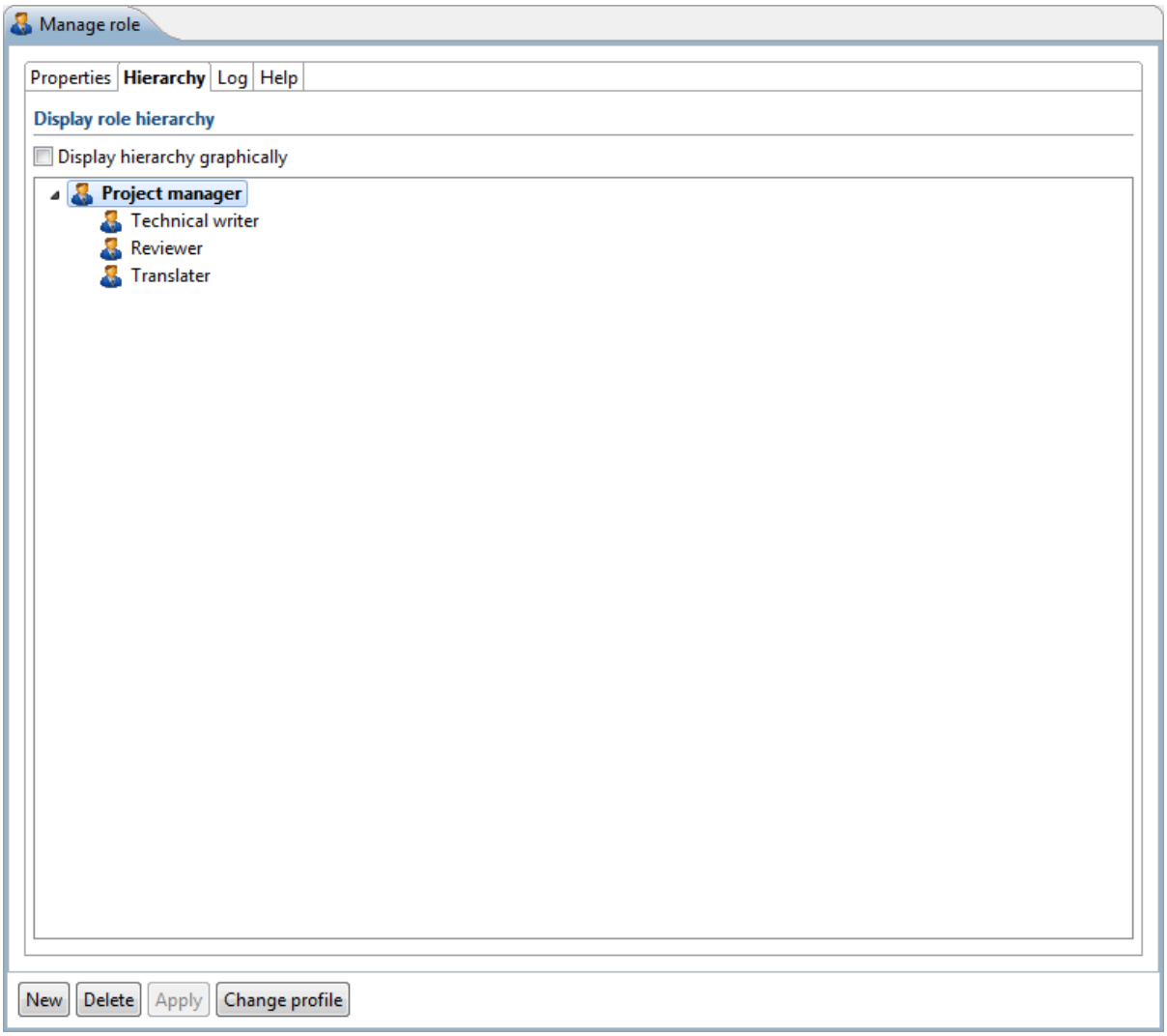
To assign an inferior role to a main role:

1. Select the main role, in the **Roles** branch.
2. Click, in the **Properties** tab, on the button of the **Inferior roles** field.
3. Enter the name of the role you want to assign as inferior.
4. Double click on the name to validate.

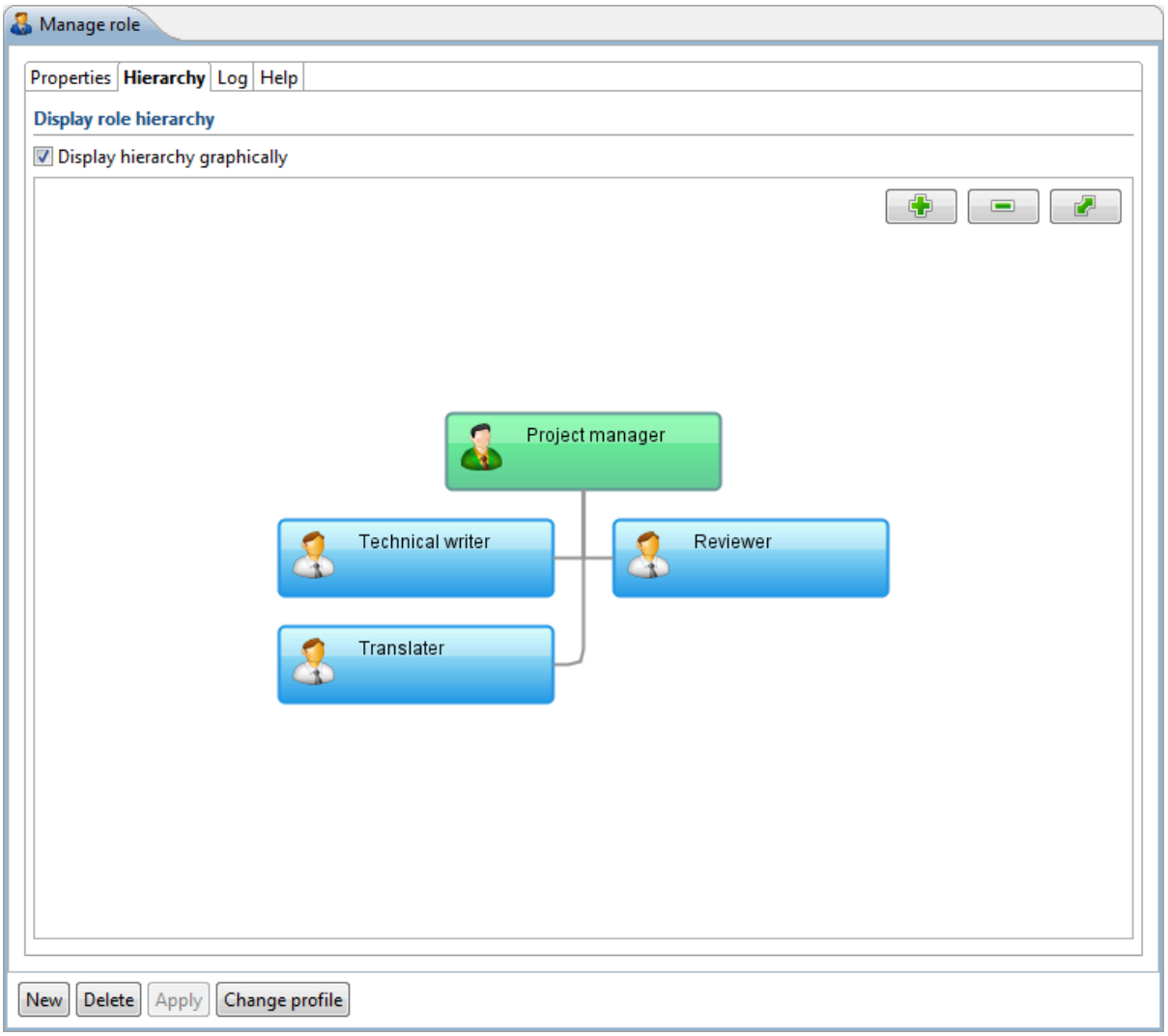
You have assigned an inferior role to a main role.


Manage role
Properties
Hierarchy
Log
Help
Role data
Role name
Project manager
Role description
The Project manager manages a team made of one translator, one reviewer, and one technical writer.
Inferior roles
Technical writer;Reviewer;Translater;
External directory identification
Access level
Custom
(Inherited)
Custom properties
Name
Value
Role assignments
<filter>
Users(selected 3 out of 13)
Accueil
Admin
Arnaud Durand
Aude Delors
Aurélien Dubois
Francis González
James Cook
Jean Dupont
Jean Valjean
John Ford
Julien Petit
Patrick Guérin
Richard Fox
Groups(selected 3 out of 25)
Consultant
Consultores
DBA
Développement
Distribution courrier
Documentation
Domestic profile
Engineers
Ingenieros
International profile
Participants actifs
Participants passifs
Purchasing Department
Réception courrier
Relecture
Secretarial office
Secrétariat
Service Comptabilité
Databases
Banque de France
Base de pruebas
Base de test
Base internacional
Base internationale
Catalog
Catalogue
Chèques
Comptabilité
Courrier
Courrier SIBA
Documentación técnica
Documentation technique
Espace de travail 1
Espace de travail 2
Events
Fournitures
Human Resources
New
Delete
Apply
Change profile

In the **Hierarchy** tab, you can now see the tree view of the main role:



You can also display graphically the hierarchy by checking the **Display hierarchy graphically**:



"LOG" TAB

The **Log** tab allows you to view a list of all the operations performed in one of the branches of Gargantua Administration Tool.

You can filter your search through the following criteria:

- Start date, end date;
- User;
- Operation.

To filter by dates:

1. Fill in the date from which you want to view the operations performed, in the **Start date** field.
2. Fill in the date until which you want to view the operations performed, in the **End date** field.

3. Click on **Display**.
   The list of the operations performed between the two dates is displayed in the **Log entries** field.

> ***You can also click on the "Week audits", "Month audits", "Year audits" and "All audits" icons, so as to view the operations performed in larger periods of time.***

To filter by users:

1. Click on the magnifying glass, close to the **User** field.
2. Fill in the user name from whom you want to view the performed operations.
3. Click on **Display**.
   The list of the operations performed by the user is displayed in the Log entries field.

To filter by operation:

1. Click on the arrow of the **Operation** field.
   A list of the possible operations is displayed.
2. Click on the type of operation desired.
3. Click on **Display**.
   The list of the operations performed in relation with the selected type of operation is displayed in the **Log entries** field.

> ***You can tick the "Show login/logout events" box to display the users connections and disconnections. This functionality is only available for the "Users" and "Server log" branches.***
>
> ***You can tick the "Only Show error audits box" to only display the failed operations.***

> ***The "Reset" button allows you to cancel the last filtering.***

You can also export the list of the performed operations, in .csv format.

To export a list of the performed operations:

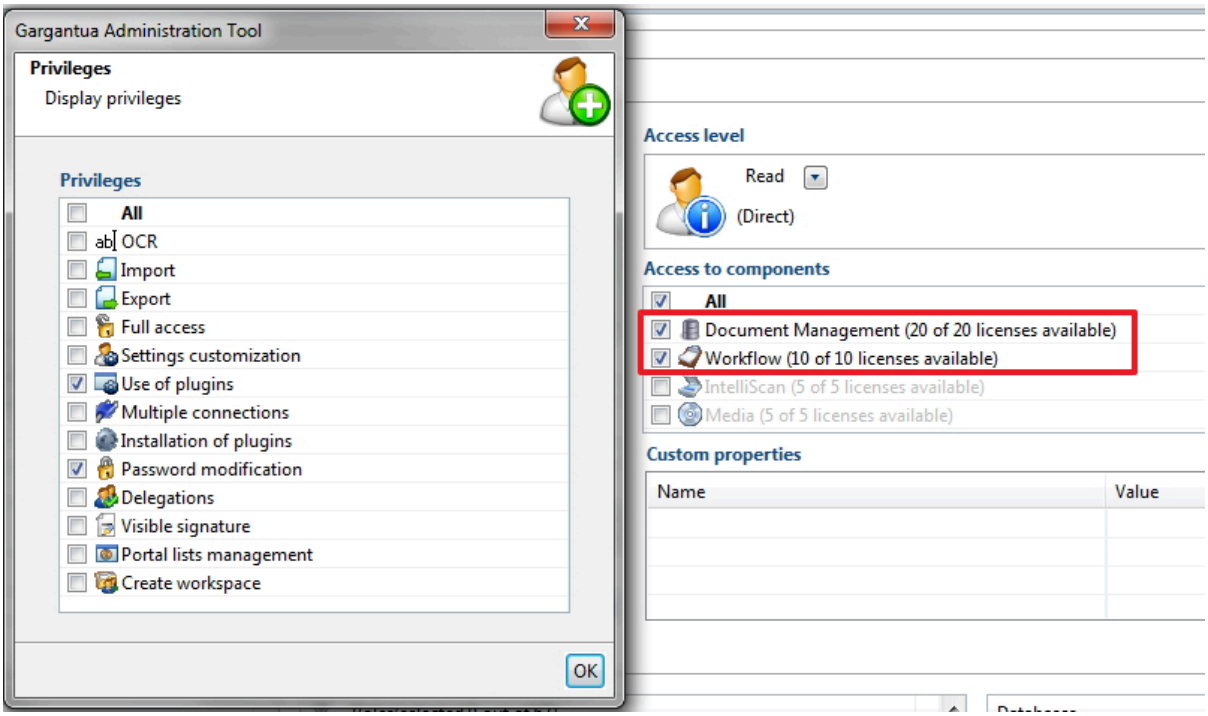
1. Generate a list, depending on the previous criteria.
2. Click on the **CSV Export** button.
3. Choose the place where you want to save the export.
4. Click on **Save**.
   You have exported a list of the performed operations.

Access levels to Gargantua privileges

Read access level

Read access level gives access to **Use of plugins** and **Password modification** privileges.

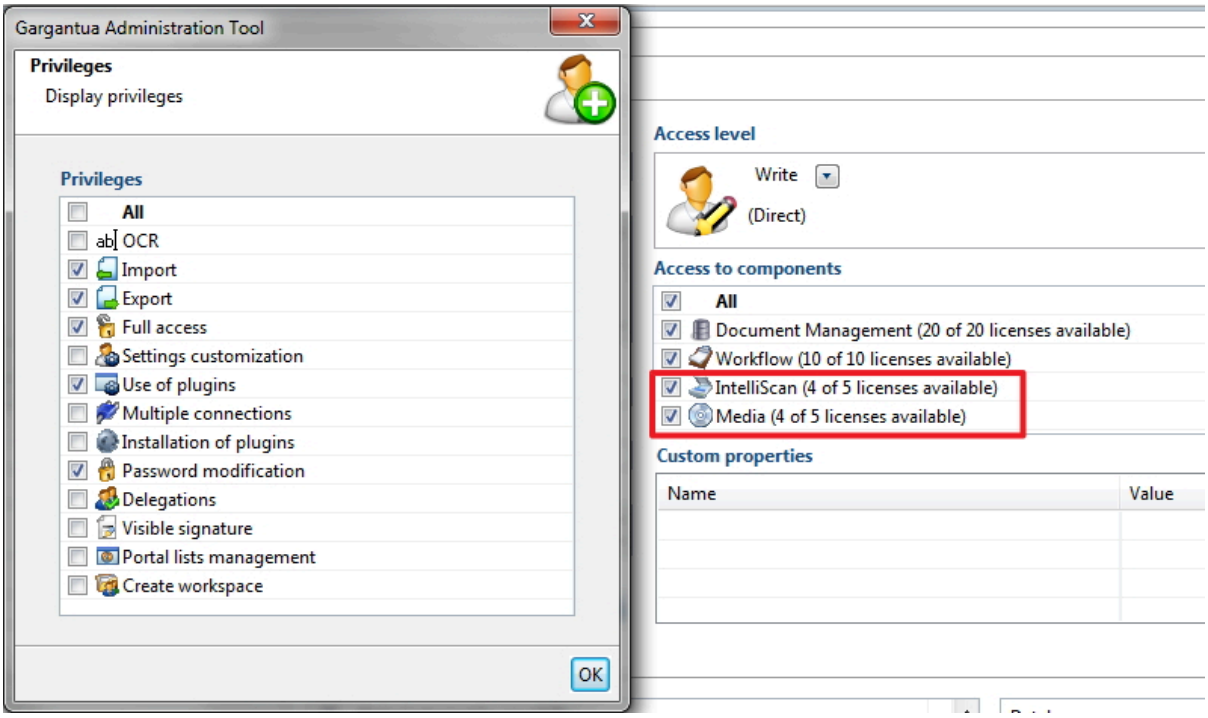
Only available in the **Users** management screen: this access level also allows a simplified access to **Document Management** and **Workflow**. For this, you only have to check the corresponding checkboxes, in the **Access to components** frame.



Write access level

Write access level gives access to **Use of plugins**, **Password modification**, but also **Import**, **Export** and **Full access** privileges.

Only available in the **Users** management screen: this access level allows by default an access to **Document management** and **Workflow** components. It also allows to access to **IntelliScan** and **Media** components. You just have to check the corresponding checkboxes in the **Access to components** frame.



Privileges to access Web client features

What is a Gargantua privilege?

The **Privileges** frame allows you to decide whether a user can access or not some of Gargantua features from the Web client. If the checkbox is checked, the user can see and use the icons and/or the links corresponding to the feature, as long as his rights on the production objects (documents, folders, pins...) that might be needed allow it.

OCR

If you check the **OCR** checkbox, the user will be able to access the **Perform OCR** tool of the ActiveX plugin toolbar. He will thus be able to perform optical character recognition operations on image document containing text, and to save them.

> ***This privilege only takes effect if the user also has the "Use of plugins" privilege. Indeed, the user needs to access the ActiveX plugin.***
>
> ***To perform an OCR operation, the user also needs to have on his computer the ABBYY OCR module and the corresponding USB key.***

Import

If you check the **Import** checkbox, the user will be able to access the **Import operation** tool of the navigation tree toolbar (left pane of the Gargantua Explorer). He will thus be able to import .sxa export files into Gargantua databases.

> ***This privilege only takes effect if the user also has the "Full access" privilege. Otherwise, he will only be able to access the limited toolbar for read-only access.***

Export

If you check the **Export** checkbox, the user will be able to access the **Export operation** and **CSV export operation** tools of the navigation tree toolbar. He will thus be able to create .sxa export files of all or part of the Gargantua databases, and .csv export files of the object attributes stored in databases.

This privilege only takes effect if the user also has the "Full access" privilege. Otherwise, he will only be able to access the limited toolbar for read-only access.

Full access

If you do not check the **Full access** checkbox, the user will only be able to access some of the tools available in the navigation tree toolbar () and in the document list toolbar (). Like in the case of an anonym connection, the user will only be able to access the most basic features of Gargantua Explorer, in read-only mode.

*If a user does not have the **"Full access"** privilege, he will not be able to access the Workflow module, nor the export/import and sign tools, even though the corresponding access rights and privileges have been granted to him.*

*Besides, the number of users that can have the **"Full access"** privilege is usually limited by Gargantua license: if you exceed the number, the corresponding users will no longer be able to connect to Gargantua.*

Settings customization

If you check the **Settings customization** checkbox, the user will be able to access the **Customize interface** tool (from the **Settings** link in the top right corner of the Web client screen). He will thus be able to create his own interface settings profile by customizing the Web client behavior.

He will also be able to modify the display mode of the documents list, even though he does not have the **Full access** privilege. He will thus be able to swap between the **Detailed list**, **Thumbnails**, **Detailed thumbnails** and **Custom** display modes.

Use of plugins

If you check the **Use of plugins** checkbox, the user will be able to use the Gargantua plugins. The import, scan and preview features performance will be improved.

Besides, he will be able to access the **Print** tool in the document list, even though he does not have the **Full access** privilege.

On Windows and with Internet Explorer, users that are not administrators of their computer will only be able to use the scan plugin if the Gargantua server URL has been added to the browser Trusted Sites list.

Multiple connections

If you check the **Multiple connections** checkbox, the user will be able to use his credentials to open simultaneously several sessions on different computers.

Installation of plugins

If you check the **Installations of plugins** checkbox, the user will be able to access the **Plugins and components** tool (from the **Settings** link in the top right corner of the Web client screen). He will thus be able to install the plugins on any computer of which he is an administrator.

> *The user will also need the "Use of plugins" privilege to actually use the plugins after installing them.*

Password modification

If you check the **Password modification** checkbox, the user will be able to access the **Change password** tool (from the **Settings** link in the top right corner of the Web client screen).

Delegations

If you check the **Delegations** checkbox, the user will be able to access the **Create delegations** tool (from the **Settings** link in the top right corner of the Web client screen). He will thus be able to delegate the responsability of his objects and jobs to another user for a given time.

Visible signature

If you check the **Visible signature** checkbox, the user will be able to access the **Add a visible signature** tool from the document list toolbar. He will thus be able to add signatures that can be seen directly in the PDF file body (handwritten signature and visible digital signature).

> *This privilege only takes effect if the user also has the "Full access" privilege. Otherwise, he will only be able to access the limited toolbar for read-only access.*

Create workspace

If you check the **Create workspace checkbox**, the user will have access to the **Convert to workspace** tool in the folders toolbar. He will be allowed to create a workspace from a folder located in a database to which the

user is assigned.

The user will also have access to the  **Create workspace** tool in the folders toolbar of the **Workspace** tab.

In both cases, the user will be able to define the manager(s) as well as the user(s) that have read or write access to the newly created workspace.

Managing roles

Assigning a role to a Gargantua database

To assign a role to a Gargantua database, proceed as follows:

1. In the area 9 of the **Manage role** screen (**Databases** frame), check the checkboxes corresponding to the databases of your choice.
2. If you want the role to be able to access the explorer of the database, check the **Explorer** checkbox in the area 10 of the **Manage role** screen.
3. If you want the role to be able to access the archive part of the database, check the **Archive** checkbox in the area 10 of the **Manage role** screen.

   The assignments are saved right away: you do not need to click the **Apply** button. The users of the current role can now access the contents of the databases selected, to the extent of their access rights and privileges.

> ***To assign a role to a database, you can also use the "Users, groups, roles" frame in the "Assignments" tab of the management screen available at the root of each database.***

Assigning a role to a Gargantua user group

To assign a role to a Gargantua user group, you can either use the area 7 of the **Manage role** screen (**Groups** frame) or the **Roles** frame of the **Manage group** screen.

In both cases, you only need to check the corresponding checkbox. The assignment is saved right away: you do not need to click the **Apply** button. The role now belongs to the group selected.

Assigning a user to a role

To assign a user to a role, you can either use the area 6 of the **Manage role** screen (**Users** frame) or the **Roles** frame of the **Manage user** screen.

In both cases, you only need to check the corresponding checkbox. The assignment is saved right away: you do not need to click the **Apply** button. The user now belongs to the role selected.

Assigning an interface settings profile to a role

To assign an interface settings profile to all the members of a role, proceed as follows:

1. In the left pane of the Administration Tool, click the **Roles** branch.

   The **Manage roles** screen displays in the right pane.

2. In the **Roles list**, click the row corresponding to the role of your choice.

   The role is highlighted.

3. At the bottom of the right pane, click the **Change profile** button.

   The **Change profile** dialog displays.

4. Select the interface settings profile of your choice in the drop-down list.

   Only the general profiles display in the drop-down list. The custom settings profiles of the users are excluded.

5. If you want to override the custom profiles that the role members may have created, leave the **Override the user's custom profiles, if any** checkbox checked.

   If you only want to assign the profile selected to the users who do not have a custom profile, clear the checkbox.

6. Click **OK** to close the dialog.

   A warning message reminding you that applying these modifications will disconnect the users displays.

7. Click **Yes**.

   The interface settings profile selected has been assigned to the role members.

Assigning interface settings profiles to all the members of a role, and then to all the members of a group, may end up confusing. This is why it is not recommended to apply common interface settings profiles to the members of a role.

Deleting a role

If you want to delete a Gargantua role, proceed as follows:

1. In the left pane of the Administration Tool, click the **Roles** branch.

   The **Manage roles** screen displays.

2. In the **Roles list**, click the row corresponding to the role you want to delete.

   The role row is highlighted.

3. In the bottom left corner of the right pane, click the **Delete** button.

   A warning message reminding you that deleting a role is irreversible displays.

4. Click **Yes**.

   The role has been deleted. Its name does not display in the **Roles list** any longer.

Deleting a role does not delete the users that belong to this role.

Creating and managing Gargantua roles from an LDAP directory

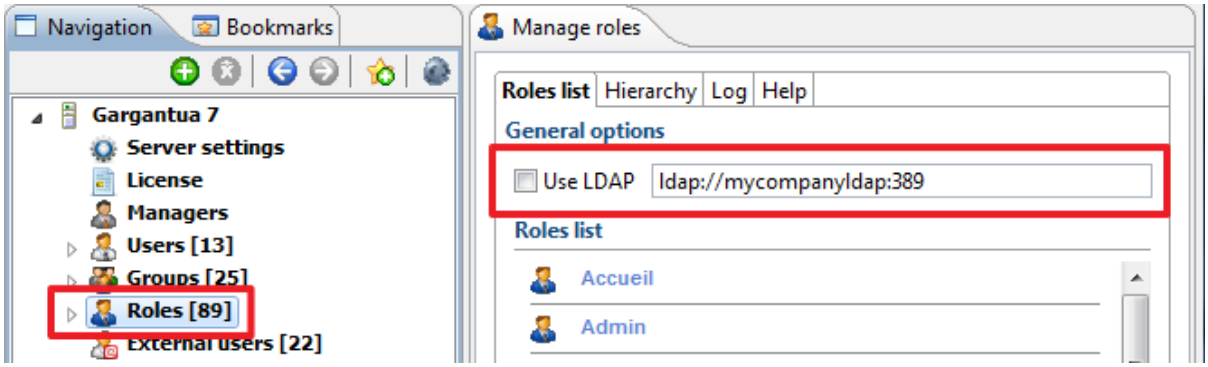
General

If your company uses an LDAP directory, you can use this directory with Gargantua in order to automatically create the roles.

The LDAP configuration of the Gargantua server is done from the Web client: **G Menu > Server configuration > LDAP**.

Once the configuration has been done, the following information display in the Administration Tool:

- **Manage roles** screen: LDAP server URL, in the **Use LDAP** field;



- **Manage role** screen: LDAP ID of the current user, in the area 3 of the screen, **External directory identification** field.

Updating Gargantua roles from the LDAP directory

To update Gargantua roles according to the information stored on the LDAP server:

1. In the left pane of the Administration Tool, click the **Roles** branch.

   The **Manage roles** screen displays.

2. In the bottom right corner of the right pane, click the **LDAP Synchronization** button.