

# Users Management

# Permissions

- **Users:** Create, update and delete users in the system.
- **Groups:** Easy way to assign tasks and processes to a *set* of users.
- **Departments:** Replicate hierarchical structure in PM.
  - A user can belong to only **one** department.
- **Roles:** Users can have only one role in PM, which controls what a user can do within a process. Default role is Operator (log in and run cases).

# Users

- Users can be active, inactive or in vacation.
- Only the user with the `PROCESSMAKER_ADMIN` role is able to change the role of a user.
- Only users that have the permission `PROCESSMAKER_ADMIN` can assign authentication sources to existing users.

## Users & LDAP

- It is not possible to change an imported user's password from inside ProcessMaker; their passwords have to be changed inside LDAP or Active Directory.
- However, other information can be changed in ProcessMaker, like their email, address, telephone, etc., but will not be synchronized with the external authentication source.

# Roles

- If a role is set to INACTIVE, and a user is assigned to that role, the user can NOT log in to ProcessMaker until the role is changed to ACTIVE.
- The `PM_CASES` permission provides access to both the CASES menu in the HOME section of ProcessMaker and the Documents.

# Departments

- Departments in ProcessMaker have the option to include a user assigned as the "manager". Nevertheless, when a sub-department does not have a manager assigned, and a task in a process has the Reports To assignment method, the closest supervisor in the structure is assigned to the next task.
- If a department has sub-departments, first delete the sub-departments before deleting the department.

## Assigning users to tasks

- It is best practice to assign groups to tasks, rather than individual users.
- During migration, user assignments are discarded, but group assignments are preserved.
- On a new PM instance, users are assigned to groups, and there is no need to assign to a task again.