

# How to Configure Roles

## Objectives

- [Enable Roles Feature](#)
- [Configure Roles for Client Portal users](#)

## Steps

LEXZUR allows you to configure roles for users based on company hierarchy, enabling you to specify the manager for each user. By assigning roles, such as Line Manager, Legal Review, Finance, General Manager, and more, you can determine the appropriate Approval Center and Signature Center for each requester based on their business unit and department.

To begin, you must enable the Roles Feature from the Contracts Setup and Configuration: Navigate to the **System Preferences Setup & Configuration Contracts/Documents Default Values**

Scroll down and allow Roles to be selected as approver and signees.

Settings / Setup & Configuration

Active Directory

Adobe Sign Integration

Advisor Portal

Contract/Document Default Values

Client Portal

Default Values

Delegation

DocuSign Integration

External Links

Hearing Verification Process

Document Content Search

Maker Checker Control

Menu External Links

Notifications

Outgoing Mail

Password Policy

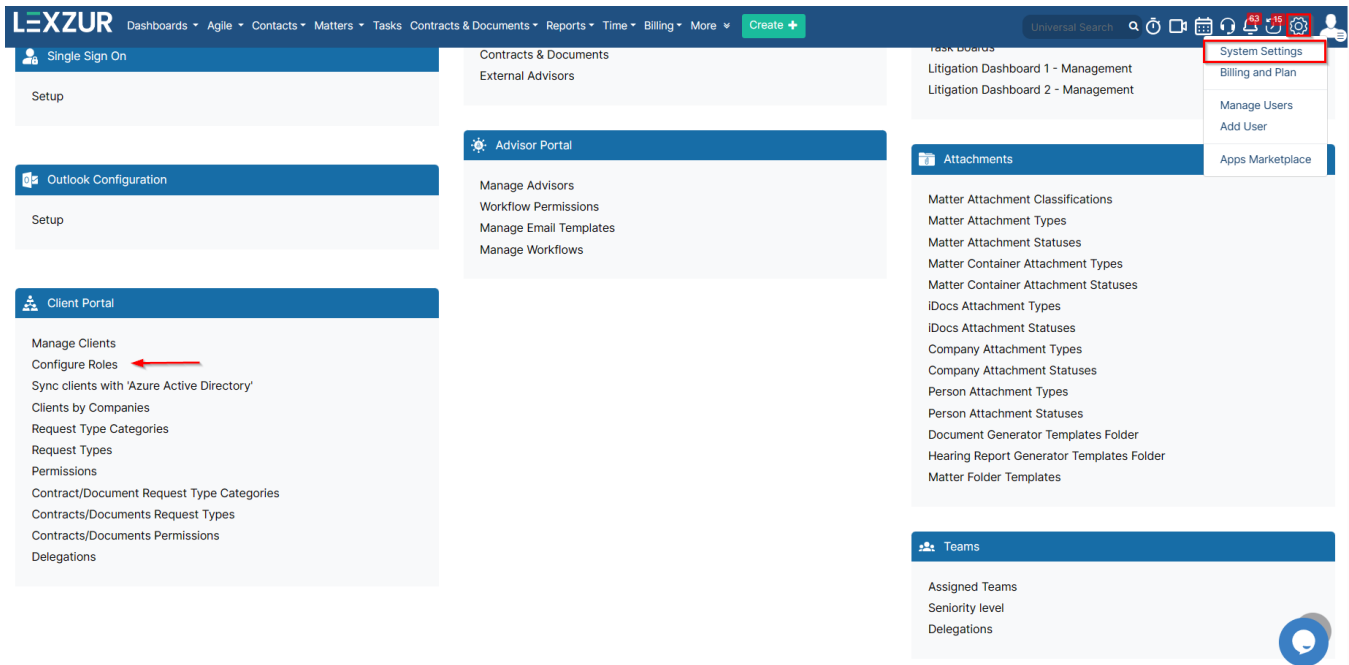
Reminders

System Values

Web Hooks

Allow Feature "Link Statuses" ?	Yes	Save
Custom fields added to approval email	Select	Save
Archive Status	Executed	Save
Private by Default ?	No	Save
Reminder Type	system-reminder	Save
Allow feature "Hijri Calendar"	No	Save
Allow Board Members to be selected as approvers and signees	Yes	Save
Allow Roles to be selected as approvers and signees	Yes	Save
Allow Shareholders to be selected as approvers and signees	Not Set	Save

The next step is to configure these roles from the Client Portal Settings. Therefore, go to **System Setting Client Portal Configure Roles**



To add a new Role:

Settings / Configure Roles ?

Role ?	Type ?	Lookup By ?	Operator ?	Value	Actions
Project Manager ←	Dynamic ←	Manager ←	Equal	Manager of the requester ←	
General Manager	Dynamic	Job Title	Equal	General Manager	
CEO	Fixed	Portal User	Equal	Micheal Cavin	

[Add Role](#)

[Save](#)

- Define each **Role**, such as Project Manager, Line Manager, CEO, etc...
- Specify the **Type** either **Dynamic** or **Fixed**. Dynamic Roles may differ depending on the requester, e.g., Line Manager, while Fixed Roles do not change, e.g., CEO

Type ?

Dynamic

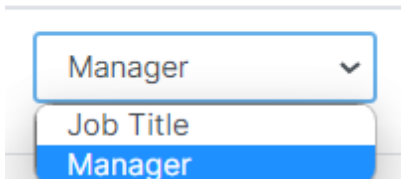
Select Type

Fixed

Dynamic

- The "**Looking By**" field allows you to specify the users assigned to a particular role. By selecting "Manager," the system will automatically include the requester's direct manager. Alternatively, you can configure the role assignment based on the "Job Title," providing flexibility in determining the appropriate users for each role.

## Lookup By ?



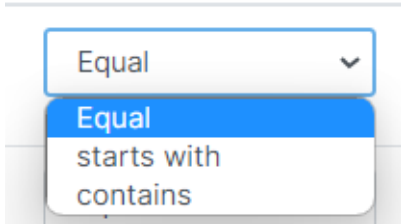
Manager

Job Title

Manager

- **Operator** helps you find the job title you're looking for. Equal is for an exact match of the value, Starts With, includes anyone whose job title starts with the designated value. Contains will include any position that contains the designated value.

## Operator ?



Equal

Equal

starts with

contains

These predefined roles can be conveniently used later in approval and signature processes, ensuring streamlined and efficient workflows within your organization.



Make sure that you indicate the manager of each user or the job title based on the defined rules from the "Manage Users" page in the client portal.

Add Client

More Fields

Company:

Job Title:

Employee ID:

Phone:

Mobile:

Department:

Address:

Manager:

Save

Save and Create Another

Cancel

Now, the "Manage Roles" options allow you to include Core or Client Portal users, providing greater flexibility in user role management.

Settings / Configure Roles

Role	Type	Lookup By	Operator	Value	Actions
Project Manager	Dynamic	Manager	Equal	Manager of the requester	
General Manager	Dynamic	Job Title	Equal	General Manager	
CEO	Fixed	Portal User	Equal	Micheal Cavin	
Lawyer	Fixed	Core	Equal	Jimmy Peterson	

Add Role

Save

For more information about LEXZUR, kindly reach out to us at [help@lexzur.com](mailto:help@lexzur.com).

Thank you!