


Roles and Permissions



The roles and permission guide contains non-default features of eSignAnyWhere. If you are interested in these optional features please [contact us](#).

































































v 20.28

Please note: The changes regarding roles and permissions take effect after the affected user(s) log out and login again.

This section guides you through all settings referencing the predefined roles and permission. In addition to the predefined roles and permissions you can also define your own roles in this section. For example, you can define a new role, where users can manage and send envelopes, but not create the envelopes on their own. Or a role which can configure automatic remote signature themselves, without being user managers. Moreover, you can also set the permissions for those custom roles.

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The "Roles and Permissions" Settings View

Figure	Description																											
<div><div><div><div></div><div>ROLES AND PERMISSIONS</div><div><div>ADD NEW ROLE 1</div><div>2</div></div></div><div><div>NEW DOCUMENT</div><div>HOME</div><div>DOCUMENTS</div><div>TEMPLATES</div><div>CLIPBOARD</div><div>SETTINGS</div><div>Account</div><div>Notifications</div><div>Address Book</div><div>Roles and Permissions</div><div>API Tokens and Apps</div><div>Organization</div><div>Identity Providers</div><div>Licensing</div><div>Users</div><div>Team</div><div>Localization</div><div>Notification Templates</div><div>Agreements Configuration</div><div>Envelope History</div><div>Errors</div></div><div><div>eSignAnyWhere v20.02.0.018</div><div>© 2023 Narmat Group</div><div>Terms of use Privacy API</div></div></div><div><table><tr><th>Role</th><th>Users</th><th>Actions</th></tr><tr><td>Administrator</td><td>5</td><td>  </td></tr><tr><td>API User</td><td>5</td><td>  </td></tr><tr><td>Automatic Sealing Sender</td><td>5</td><td>  </td></tr><tr><td>Developer</td><td>5</td><td>  </td></tr><tr><td>Power User</td><td>5</td><td>  </td></tr><tr><td>Registered Signer</td><td>5</td><td>  </td></tr><tr><td>Test</td><td>0</td><td>  </td></tr><tr><td colspan="3">more</td></tr></table></div></div>	Role	Users	Actions	Administrator	5	  	API User	5	  	Automatic Sealing Sender	5	  	Developer	5	  	Power User	5	  	Registered Signer	5	  	Test	0	  	more			<div><div>?</div><div>⌵</div></div> <div><div>1. Add a new role</div><div>2. Overview of all roles</div></div>
Role	Users	Actions																										
Administrator	5	  																										
API User	5	  																										
Automatic Sealing Sender	5	  																										
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Registered Signer	5	  																										
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more																												

1. Add a new role

2. Overview of all roles

Predefined roles

Please note that the following roles and permissions in this section are not editable.
There are the following predefined roles which you can find in your organization in the section Users

- Power User
- Registered Signer
- Administrator
- Automatic Sealing Sender

- Change the identifier of a role (only when no user is assigned to that role)
- find a list of users assigned to the role
- allow adding users to the role
- find a list of all permissions that can be configured for the role, including the ability to edit them

ROLES AND PERMISSIONS

Edit Role

Role name: Administrator

Add users to role: Draft Draft, Jane Doe, Richard Roe, Manuel Gierlinger, John Doe

Permissions:

Category	Permission	ALL	BLOCK	FORBID	ALLOW
Envelopes	User can view envelope list				
	User can create, edit and delete envelopes				
	User can download api envelope description				
	User can use automatic eesaling				
	User can retrieve the worksteplink				
Templates	User is allowed to see the event history of an envelope				
	User can view envelope templates				
	User can create, edit and delete templates				

CANCEL SAVE

⚠ There must be at least one user who can edit the roles.

Permissions

⚠ Please note the following restrictions:

- A permission can be granted (allow), not-granted (forbid) or blocked in each of the roles.
- As soon as a permission is configured to allow by minimum one role (but not blocked by another role), the permission is granted.
- As soon as one role blocks a permission, it is not granted/blocked for the resulting permission set.

Moreover:

- If a permission is set to allow, but the depending features are not enabled the final permission status is forbid
- If a permission is set to allow, but its permission dependencies are not met the final permission status is forbid
- If a permission is set to allow in one or more roles, but another role sets the permission to block the final permission status is forbid

For your roles you can also set the permissions. Before we have a look at the different permissions please see the following name schema:

- create: for permissions that create an object (e. g. envelope – regardless if from clipboard, from template etc.)
- read: if a single item is presented to the user
- list: if many items are listed to the user (e. g. address book)
- edit: if one or many items are edited. Edit includes change but not deletion.

Before you read the next section (permission section) please watch the next video that shows you how to add a new role and set permissions:

Your browser does not support the HTML5 video element

Following figure shows what the user can see if just the "Registered Signer" role is assigned:

ACCOUNT

Personal

Picture

First name

Last name

Email

Job Title

Mobile phone

User Token

Password

Old Password

New Password

Confirm New Password

CHANGE PASSWORD

Authentication

OAuth - Manage Open Authorization provider of your account

Signature Image

Upload your own signature image

OPEN EDITOR

General

Interface Language

Country

Time Zone

Date Format

Automated Delegation

Enable automated delegation

Substitute

End date for automatic delegation

Reason

Also forward CC

SAVE

Permission sections

i The view permissions have to be granted in addition to the edit permissions, otherwise the user cannot access and therefore the user cannot edit.

If no additional permissions are granted, the view permission grants just read-only access.

Envelopes

In this section you can find all available permissions which can be set for envelopes.

User can view envelope list

With this permission the user is allowed for all actions corresponding to envelopes/drafts that do not modify an envelope.

User can create, send, edit and delete envelopes

Allows a user with the permission, to create, send, edit and delete envelopes as well as the user can view and/or edit the templates if the permission "templates" is enabled. Furthermore, the user is allowed to use the function "clipboard". Moreover, the user is allowed to use api methods referring to create and send envelopes.

Additional required permissions	Required feature flag
User can view envelope list	Api*
User can view, edit and delete clipboard*	Envelope templates*

* optional permissions and features

User can download api envelope description

Allows a user with the permission, to download the configuration of the envelope in XML and JSON with the developer mode.

Additional required permissions	Required feature flag
User can view envelope list	Api
User can create and send envelopes	

User can use automatic eseealing

With this permission, the user is allowed to use the automatic remote signature workflow.

Additional required permissions	Required feature flag
User can view envelope list	AutomaticRemoteSignature
User can create and send envelopes	UseCustomizationId

User can retrieve the worksteplink

Allows a user with the permission, to copy workstep links of recipient in the envelope detail/index.

Additional required permissions	Required feature flag
User can view envelope list	

User is allowed to see the event history of an envelope

Additional required permissions	Required feature flag
User can view envelope list	
User can create and send envelopes	

Templates

In this section you can find all available permissions which can be set for templates.

User can view envelope templates

Allows a user with the permission, to access the template configuration pane. This permission should only be activated if the user is already allowed to view, create and send envelopes.

Additional required permissions	Required feature flag
	Envelope templates

User can create, edit and delete templates

Allows a user with the permission, to create new templates as well as edit and delete existing templates.

Additional required permissions	Required feature flag
User can view template list	Envelope templates

Clipboard

In this section you can find all available permissions which can be set for the clipboard.

User can use clipboard

Allows the user with the permission, to download the Microsoft Office Plugin as well as all actions which are allowed on the clipboard.

Additional required permissions	Required feature flag
User can view envelope list	
User can create and send envelopes	

Settings/Notification

In this section you can find all available permissions which can be set for the notification.

With this permission the user can enable notifications.

Additional required permissions	Required feature flag
User can create and send envelopes	



The permission notification is only for sender notification settings. The recipient notification settings are always visible.

Settings/Address book

In this section you can find all available permissions which can be set for the address book.

User will receive suggestions based on their address book while adding a recipient

With this permission, the address book will be used as data source for autocomplete suggestions when editing envelopes.

User can view the address book

With this permission the user is allowed to view the address book entries.

User can create, edit and delete address book entries

With this permission the user is allowed to edit, delete and add new address book entries.

Additional required permissions	Required feature flag
User can view address book list	

Settings/Organization

In this section you can find all available permissions which can be set for the organization.

User can view organization settings

With this permission the user is allowed to see the organization settings (except eSealing profiles) as well as the user is allowed to download the current customizations or policies.

User can edit organization settings

With this permission the user can perform all actions on the organization (except eSealing profiles)

Additional required permissions	Required feature flag
User can view organization settings	

User can add, edit and delete automatic eSealing profiles

With this permission the user can manage eSealing profiles.

Additional required permissions	Required feature flag
User can view organization settings	AutomaticRemoteSignature
	UseCustomizationId

User can create, edit and delete organization tokens

With this permission the user can manage the organization tokens.

User is allowed to see anonymized history of any envelope of its organization

With this permission the user can see the event history (anonymized) of any envelope of its organization.

Settings/Licensing

In this section you can find all available permissions which can be set for the license.

User can view license settings

With this permission the user is allowed to export organization statistics, to fetch organization statistics and the user is allowed to see the overview of the current license.

User can edit license settings

With this permission the user is allowed to change the license notification settings.

Additional required permissions	Required feature flag
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User can view licensing settings	
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Cancel License & Delete Organization

With this permission the user is allowed to cancel the organization subscription and to cancel the organization.

Additional required permissions	Required feature flag
User can view licensing settings	

User can use buy page



This permission is only available in SaaS.

With this permission the user is allowed to buy subscription for the organization.

Settings/Users

In this section you can find all available permissions which can be set for the users.

User will receive suggestions based on other users of their organization while adding a recipient

With this permission the user can use the user-list when configuring a recipient for the envelope

User can view user list of their organization

With this permission the user is allowed to see the user list as well as the user can see the user settings.

User can create, edit and delete users

With this permission the user is allowed to edit, delete, create users and to add users from the address book.

Additional required permissions	Required feature flag
User can view user list	

User can use automated delegation

With this permission the user is allowed to define a substitute which should receive the steps as a recipient instead.

Additional required permissions	Required feature flag
	Delegation
	DelegationWithAutomatedDelegation

User will receive suggestions based on other users of their organization while choosing a substitute for automated delegation

With this permission the user can use the user-list when configuring a substitute for automated delegation.

User can use the Api

With this permission the user can use the api.

User can use a password to logon

Settings/Roles and Permissions

In this section you can find all available permissions which can be set for the roles and permissions.

User can view organization user roles

With this permission the user can see custom user roles and its permissions.

Additional required permissions	Required feature flag
	CustomUserRoles

User can create, edit and delete user roles

With this permission the user can add new custom roles, modify custom roles and clone custom roles.

Additional required permissions	Required feature flag
User can view roles list	CustomUserRoles

User can assign user roles

With the permission “user can view user list” and this permission the user can assign standard roles to users. With the permission “user can view roles list” and this permission the user can assign custom roles to users.

Settings/Teams

In this section you can find all available permissions which can be set for the teams.

User can manage teams

With this permission the user is allowed to manage teams.

Additional required permissions	Required feature flag
	UserTeams

Settings/Notification Templates

In this section you can find all available permissions which can be set for the email templates.

User can view and notification templates

With this permission the user is allowed to view the template values and the user is also allowed to see the placeholder section.

User can create, edit and restore notification templates

With this permission the user is allowed to edit the email templates, to use the copy function of the placeholder section and to restore email templates.

Additional required permissions	Required feature flag
User can view and navigate though email templates	

Settings/Localization

In this section you can find all available permissions which can be set for the localization.

User can view localizations

With this permission the user is allowed to view organization cultures.

User can add, edit and remove languages

With this permission the user is allowed to manage organization cultures.

Additional required permissions	Required feature flag
User can view localization list	

Settings/Agreements

In this section you can find all available permissions which can be set for the signature disclosure.

User can view agreements configuration

With this permission the user is allowed to manage the agreements.

Settings/Errors

In this section you can find all available permissions which can be set for the errors.

User can use notification errors

With this permission the user is allowed to manage notification errors.