

# Users Roles

*Managing User Access and Permissions in qmsWrapper*



# Managing User Access and Permissions

## Users Roles

When you start your work in qmsWrapper, one of the initial steps you will complete is adding users (your colleagues, your employees) to qmsWrapper. The user who registers the company will automatically become the Administrator user in your qmsWrapper, and will have comprehensive rights throughout the system.

When first time login to qmsWrapper a Wizard will welcome you and assist you to complete the basic steps: adding company information, uploading your logo, importing users, and assigning a Role to each user. You can modify this information at any time in the **Settings/System/Wizard**.

There are two ways you can add users:

1. Through your LDAP (Lightweight Directory Access Protocol) system, or
2. Manually.

### LDAP

If you have **LDAP**, use it as it is more secure. You can always start by manually adding users and switch later. To use LDAP, you will need to fill in some required fields: Host, Base DN, ID attribute, etc.

### Manually

If you want to add users manually, all you need is their full name and email address. You can always add new users under **Settings/Users** by clicking the “**Add Users**” button. The system will automatically generate and send an email to the email address you entered. The new user will have to open the email and click the confirmation link in order to accept the invitation, and become an official user in your qmsWrapper.

What you need to know about roles:

- Every role must have at least one user, but one user can have multiple roles.
- There are 18 system roles: Auditor, CEO, Project Manager, Customer Service, Equipment Coordinator, HR Manager, Lead Researcher, Maintenance Staff, Management, Management Representative, Office Manager, PTO, Purchase Manager, QMS Manager, Risk Manager, Root Cause Analysis Leader, Technical Staff, Unit Manager.
- Besides these default system roles roles, you can create your own roles if you need to.
- As a second layer of security you can further specify user roles for each of your project. In each of your projects you can choose to include any of the system groups, and further specify which users from the system groups would be included in the project. For example on the system level you have the group of the “Project Manager” that includes 3 users, but you don’t want to include all 3 of them in every project, in this case you can further specify in the Project that which user would you like to add from the “Project manager” group.

## System

Roles/Groups:

Auditor

QMS Manager

Risk Manager



Tom



Sam

Mery



Joy

Mery

Rea

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## Hardware (Project)

Roles/Groups:

Auditor

QMS Manager

Risk Manager



Tom



Sam



Joy

## Security (Project)

Roles/Groups:

Auditor

QMS Manager

Risk Manager



Tom



Mery



Mery

## Projects

qmsWrapper is project-based, so all events will be automatically associated and recorded in a project. Your work and your activity will be organized through projects. You can always adjust **groups/members** for any project. Admin user or a Project Lead (Project creator) will decide which members will be included from the system-level groups as a representative of that group in the particular project.

For example, John and Sam are part of the QMS Manager group (system role), but you want only John to be the QMS Manager in the “Training” project. Therefore, you need to assign the QMS Manager Group to John.

### System

Roles/Groups:

QMS Manager



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### Training (Project)

Roles/Groups:

QMS Manager



Project settings can be edited by the Project Lead (the owner of the project) or by the Project Manager (system role).

\*You can always change Users and Groups under the route: Project/Name of the project/Project Settings/Members.

## User deactivation

Deactivating a User can be done under the menu of: Settings/Users, find the user you would like to deactivate, click on “Details” next to the user. Choose the “Deactivate” button, and a Wizard will guide you through a few necessary steps that are associated with the action. (for example to reassign the role to another user, reassign pending tasks, files sent for approval to that user will be canceled, and approval workflows will be deactivated, etc).

For further details or company specific questions please contact us at **[contact@qmswrapper.com](mailto:contact@qmswrapper.com)**, we will be happy to help.

Best regards,

The qmsWrapper HelpDesk Team  
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