![FireStart logo]
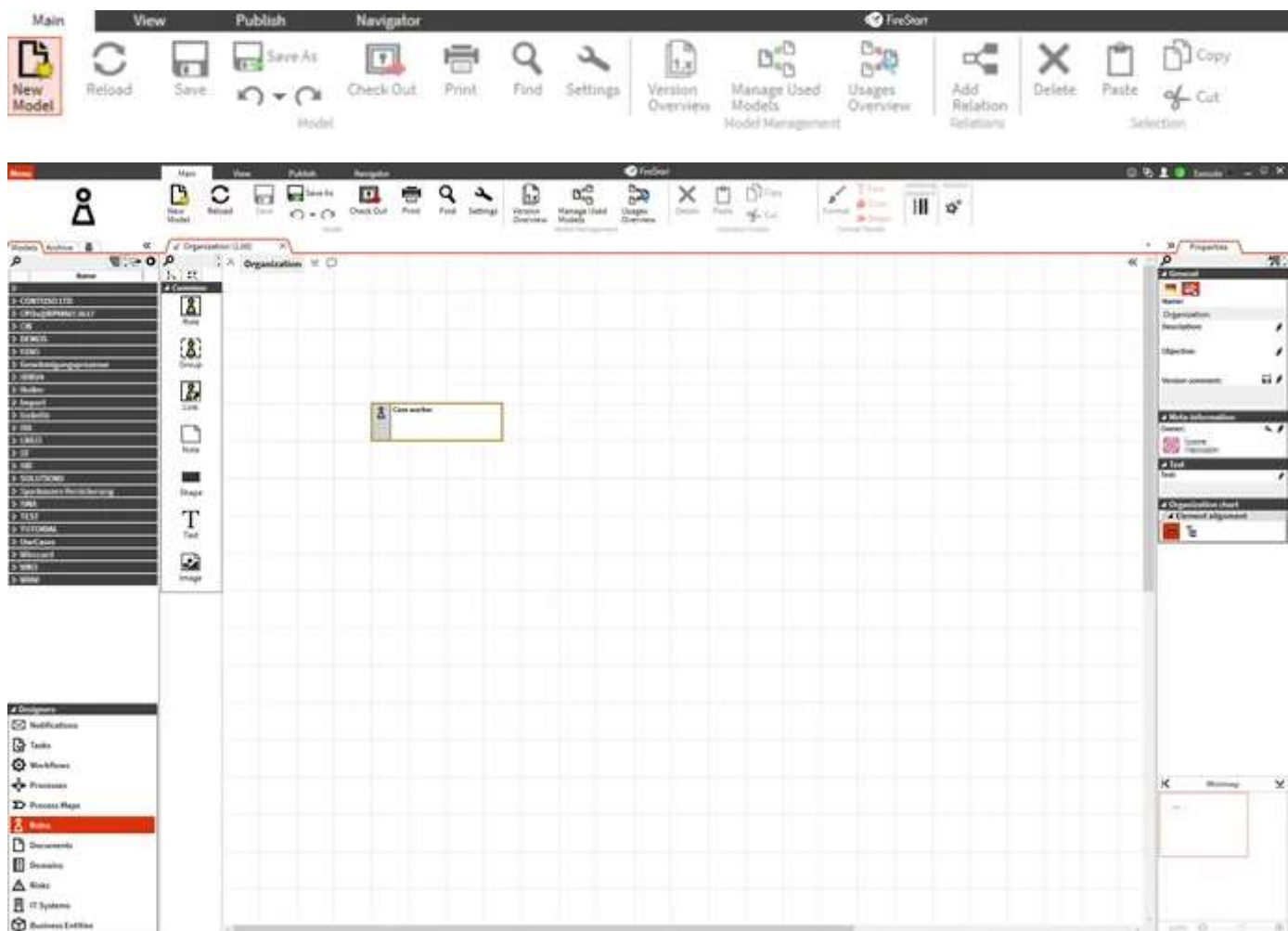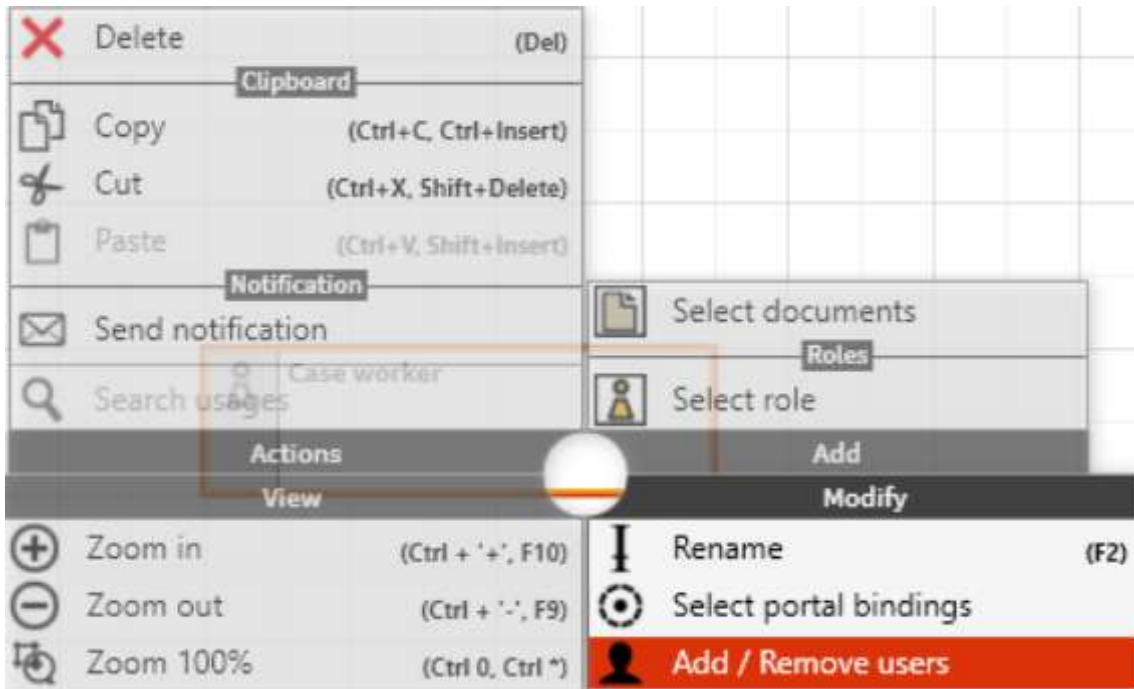
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Add Organizational Information

Select the ROLES designer and create a new model by clicking **New Model** in the top ribbon menu **Main**. A new model is created.

Place a **role element** on the canvas and name it *case worker*. Right-click the role element and select **Add/remove users**.

Search for AD users/groups by entering at least three characters of their name, email, or username and hit **enter**. Double-click the user on the left side to add it to the role. The user (Danny Ocean) in below screenshot is there for demo purposes so in your case it is recommended to search for your user as this role is assigned to tasks in the workflow later on.
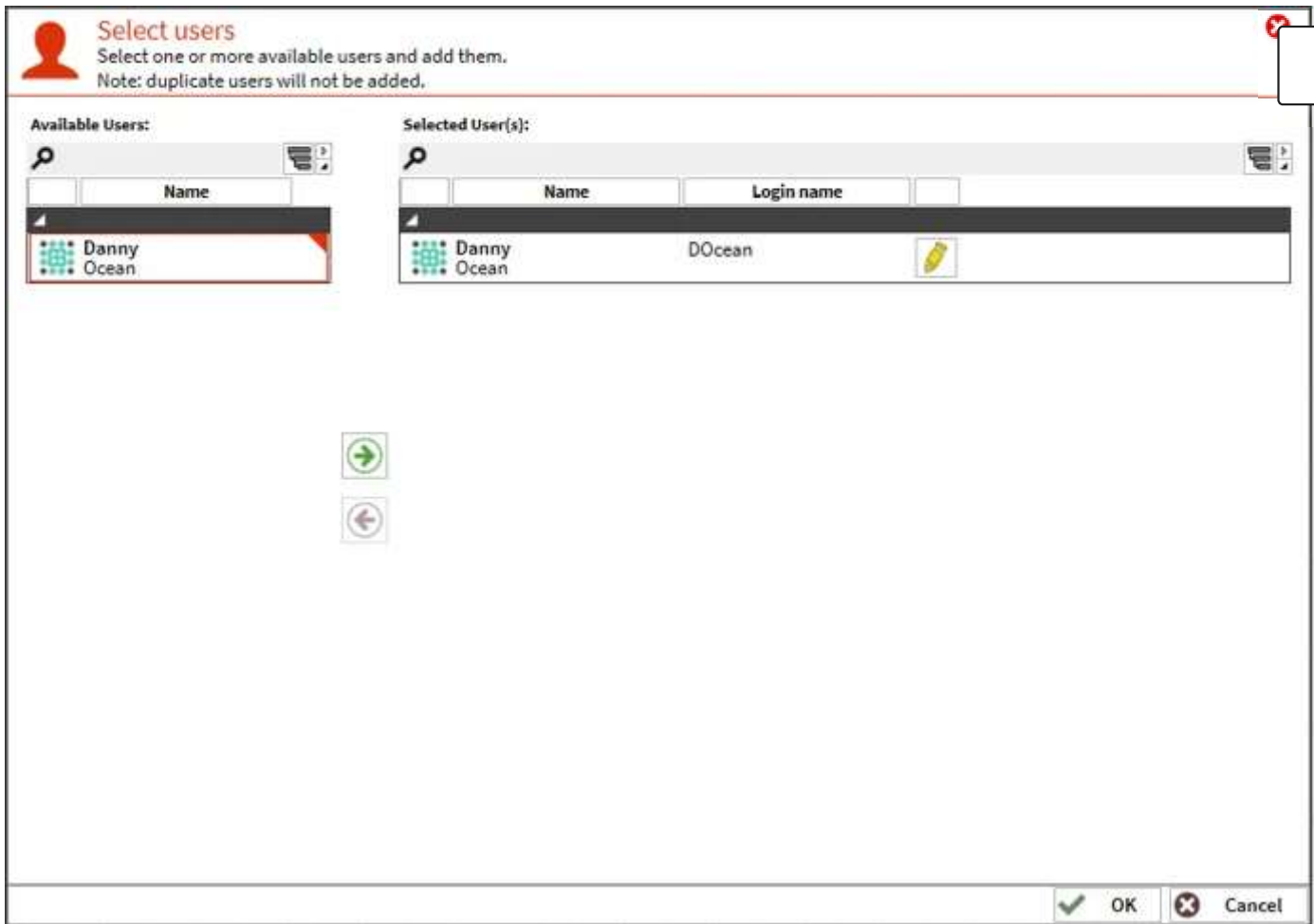
Click **OK** to close.

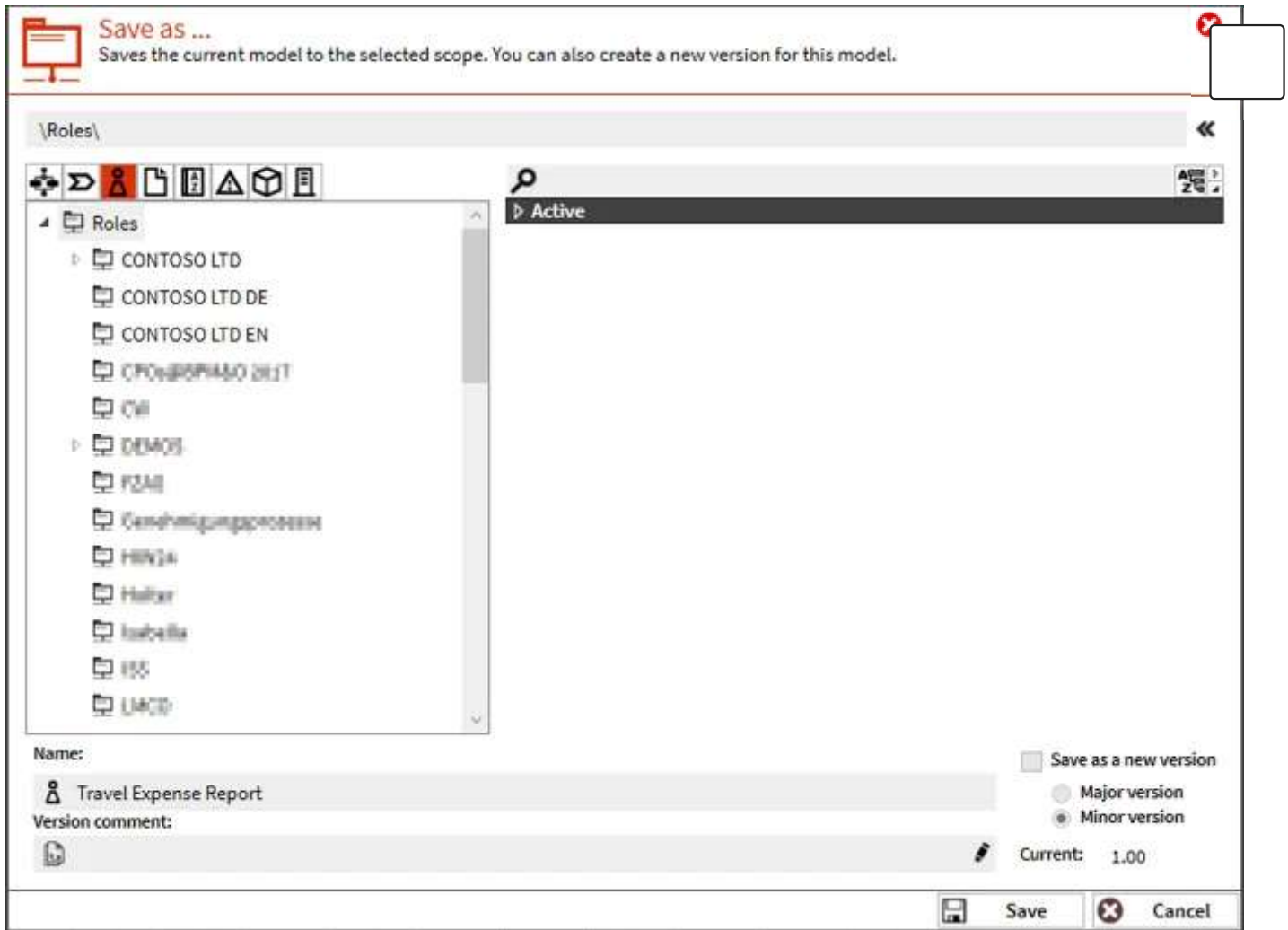Right-click the role element and click **Select portal bindings.**
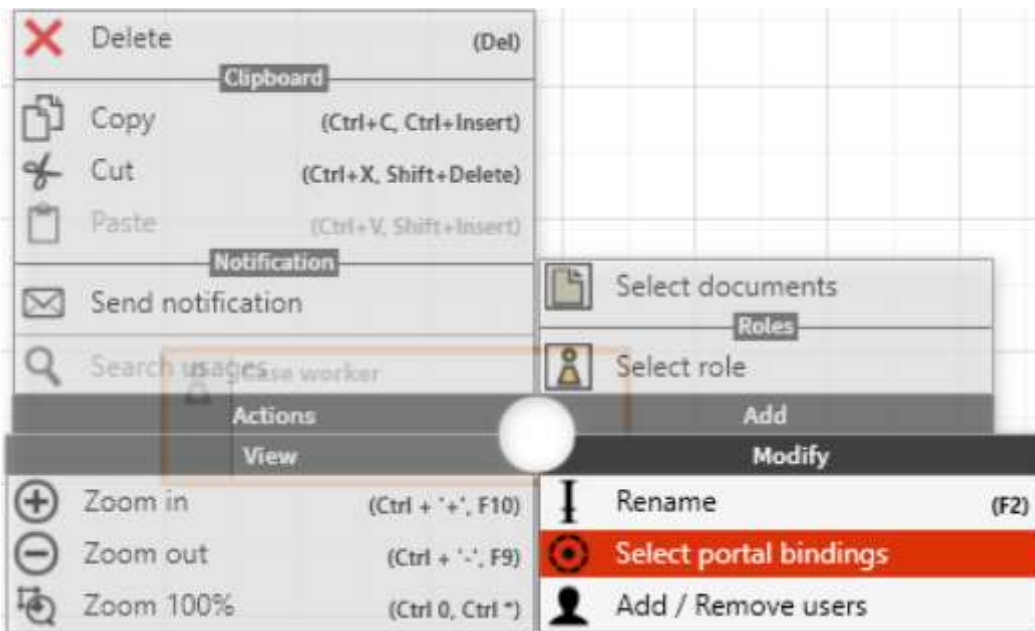
Select **Exchange Portal** in the Exchange Portal section.

Click **OK** to close.

Select **Save** from the top ribbon menu **Main**, select a scope, give the model a name and click **Save**.

Was this article helpful?   [Yes]   [No]

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