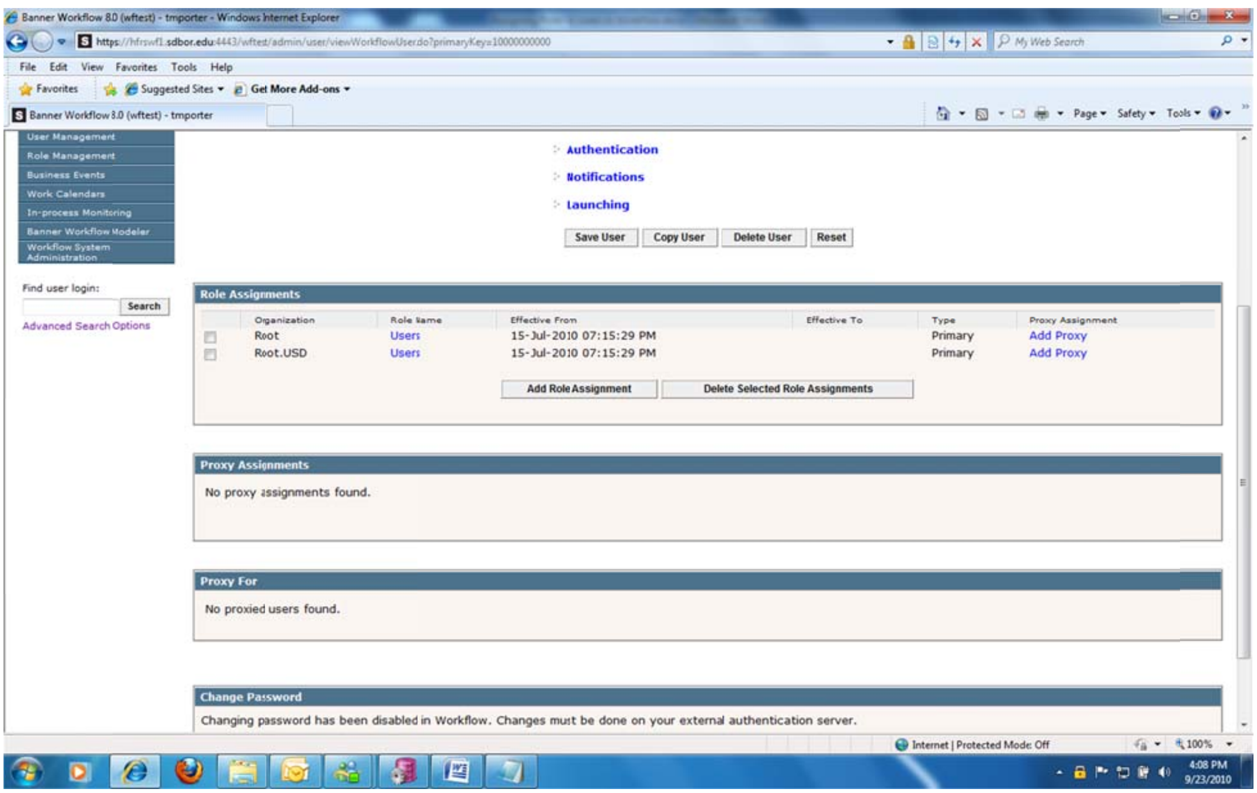
Workflow User ID and Security/Role Setup Procedures

(old name Assigning Roles to Users in Workflow)

Workflow User ID creation:

Every Friday afternoon a package is ran to create users that do not have a workflow id already. Their immuteable ID also has to exist or their ID will not be created. The package and procedure that is ran is `ZZ_RIS.ZZ_SDBOR_USER_CREATE_PKG. p_create_wfuser` this creates the user, gets the immuteable id and assigns to two default roles. Organization Root with user role and Organization with Root.instit(USD for example) as the role. This package looks at users that are not termed and have a gobtpac_external_user and do not currently exist in workflow.wfuser.

Example below:



Security Roles and what type of employees are assigned to each defined by BOR are as follows:

A. Security Classes:
   a. System Administration = Regents Information Systems
   b. Business Analyst = RIS IT staff as well as institutional IT staff, System Module Leads.
   c. Functional Leads = Institutional Module Leads.

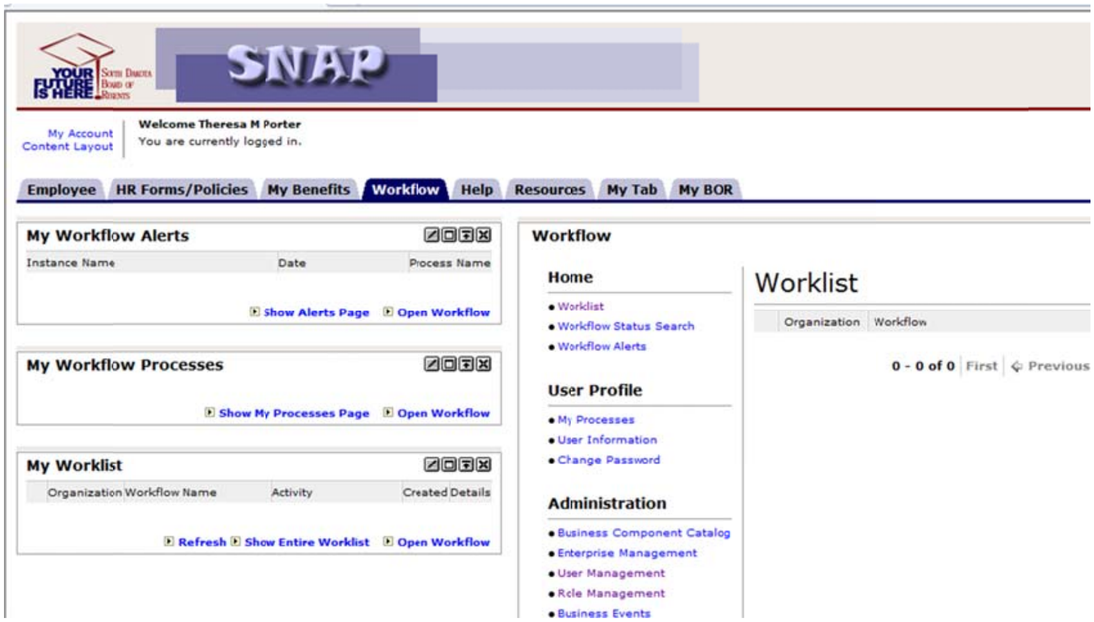
d. Power Users = Institutional staff that must troubleshoot workflow but do not build workflow. Will work with Functional Leads.
e. Users = All other employees.

Each institution identified the users for each of these roles at each of their institutions for each module.

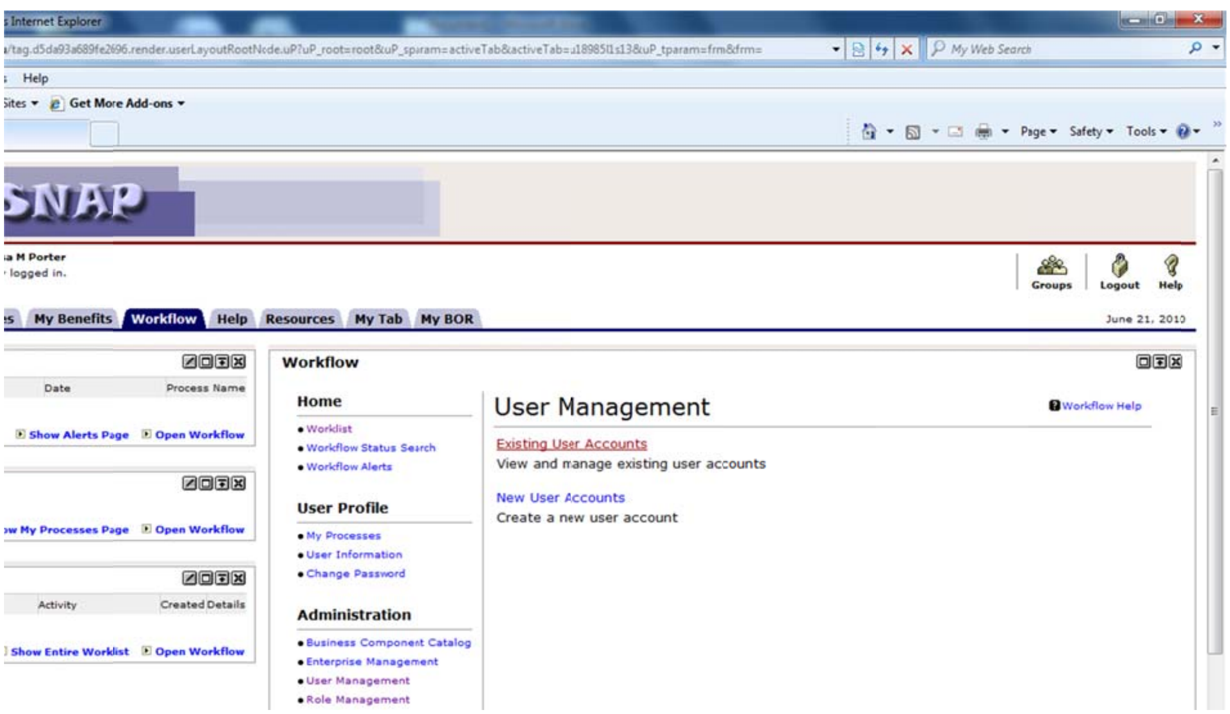
B. Security Class Set Up:
   a. Business Component Catalogue: Business Analyst and System Administration Security Classes assigned.
   b. Enterprise Management: Functional Lead and Business Analyst Security Classes assigned.
   c. User Management: System Admin (to Add) and Business Analyst (to modify) Security Classes assigned.
   d. Role Management: System Admin (Secured Role) and Unsecured (Functional Lead) Security Classes assigned.
   e. Business Events: Business Analyst and Functional Lead (Definitions) and Business Analyst, Functional Lead, and Power User (External Events) Security Classes assigned.
   f. Work Calendars: Power Users, Functional Leads and Business Analysts Security Classes assigned.
   g. In-process Monitoring: Power User, Functional Leads and Business Analysts Security Classes assigned.
   h. Modeler: Business Analysts and Functional Leads Security Classes assigned.
   i. Workflow Administration: Business Analysts and System Administration Security Classes assigned.

To lookup a user in workflow and assign them to Roles.

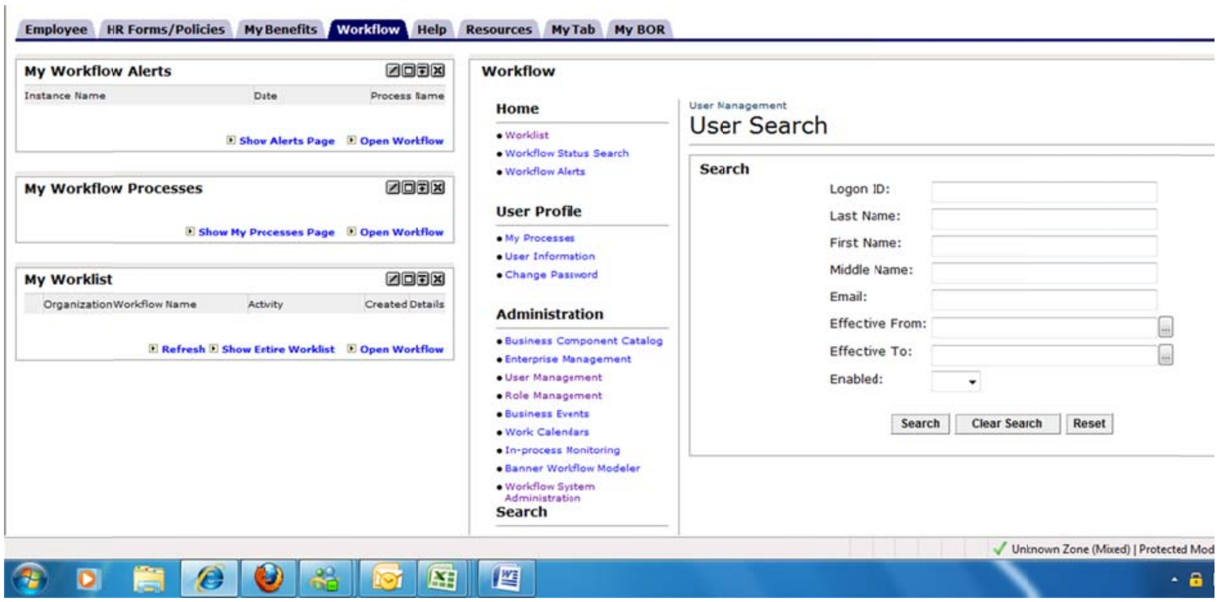
Log into SNAP and then click on the workflow tab.



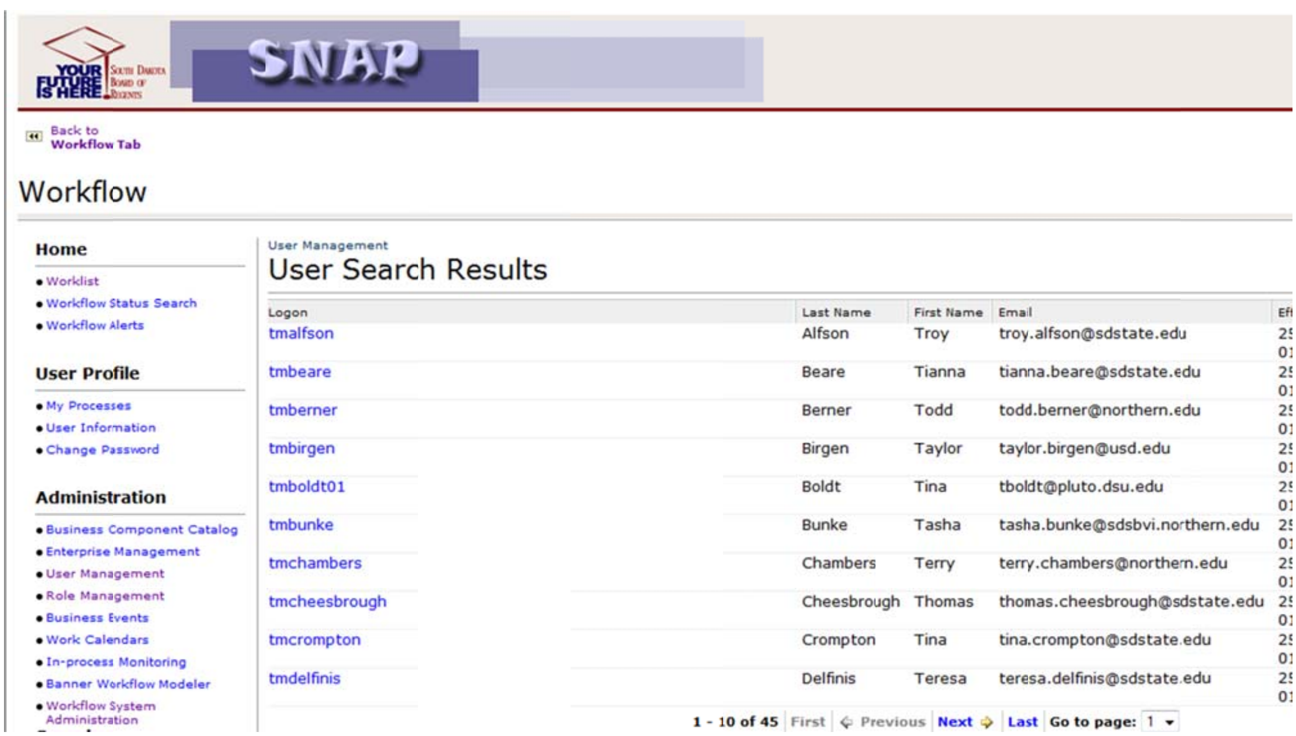
Click on User Management.



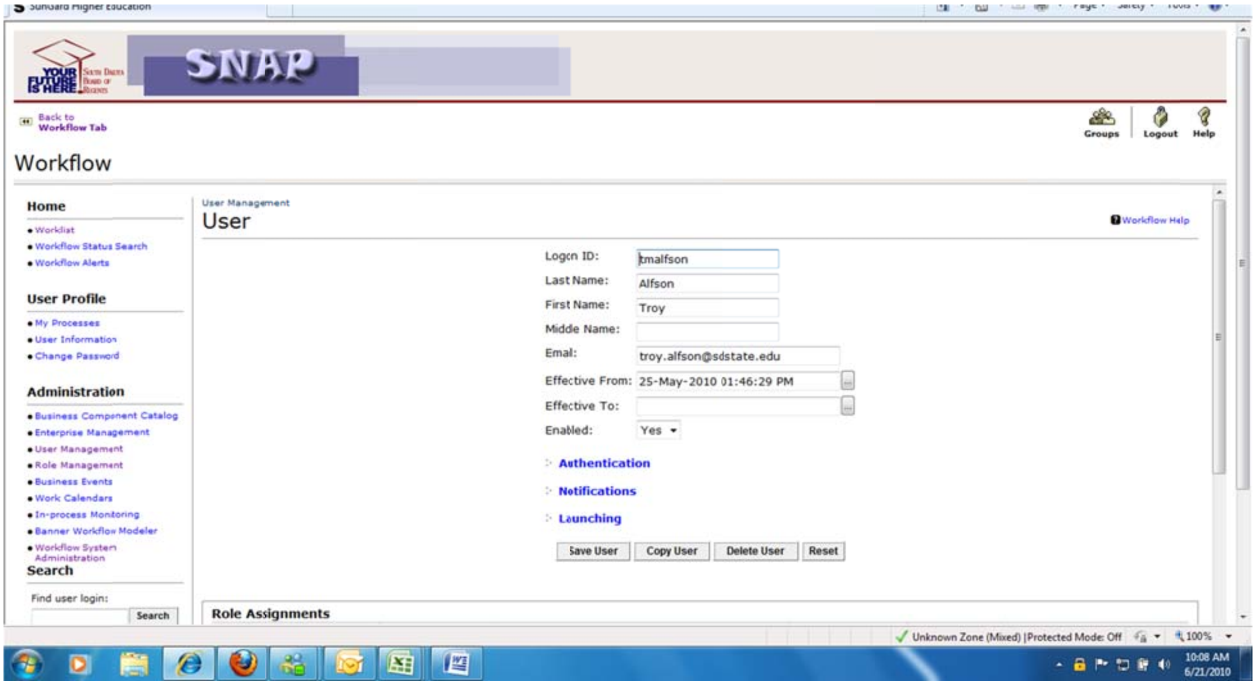
Click on Existing User Accounts

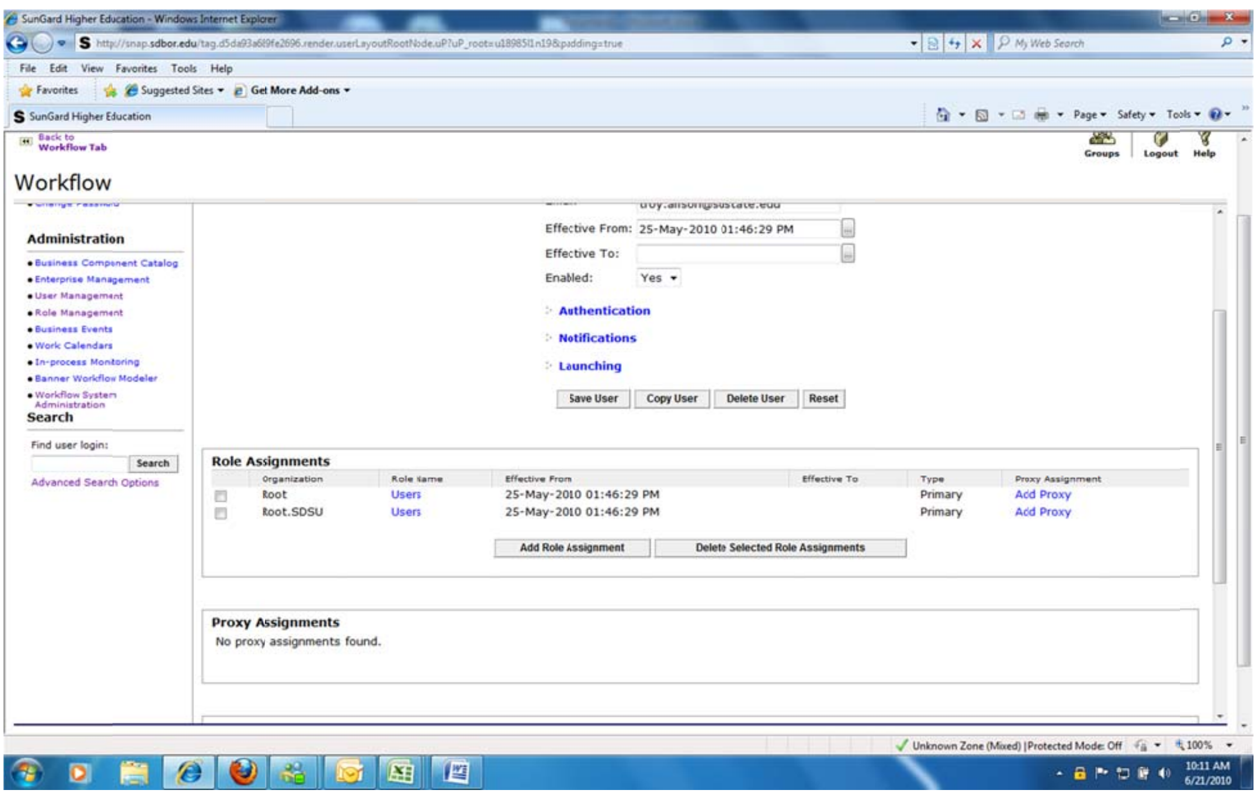


Enter Logon ID and click search or type in any of your search criteria to find the user you want to assign a role. If you do not have the exact name or id for the person and you enter a partial search a list of id's will appear for you to pick from as follows. You click on the person you want.

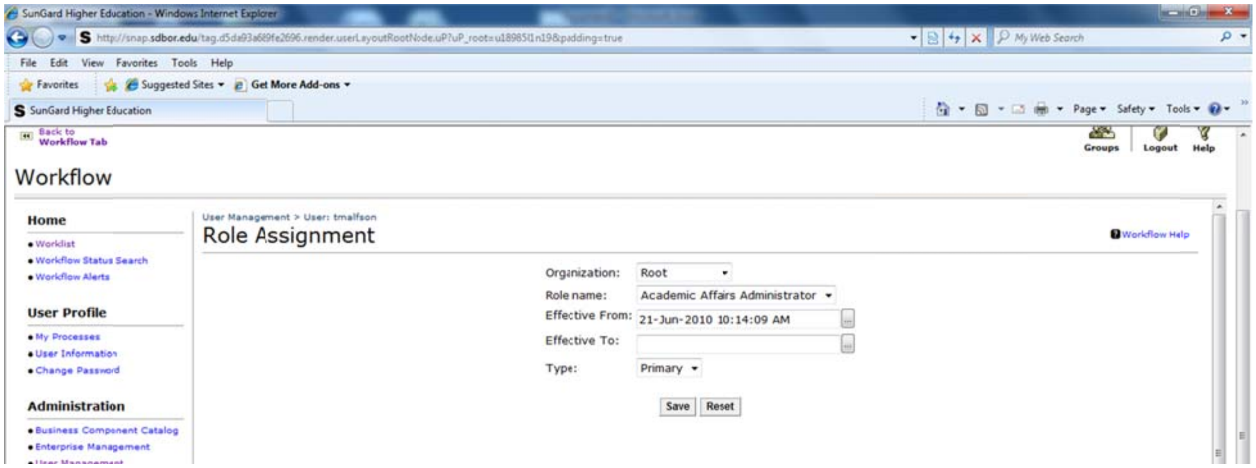


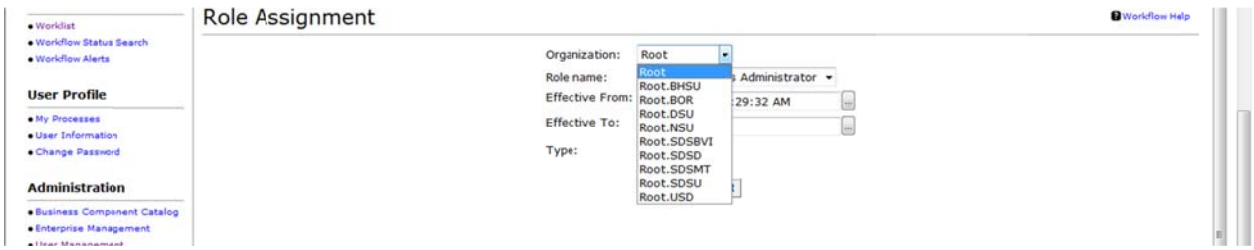
Once you click on the one you want the user id form will appear, scroll down to the Role Assignments box.





Click on Add Role Assignment to add a role to a user.





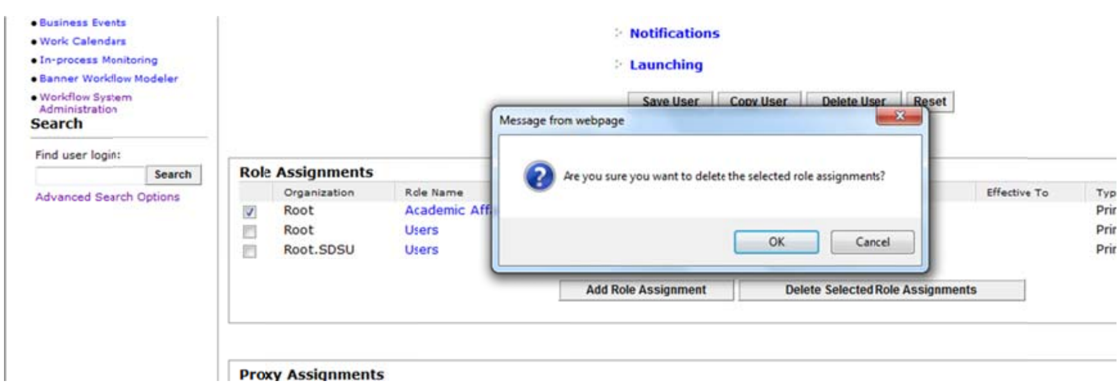
From this screen you can click the drop down for the Organization and select which organization the role assignment is for and then click on the drop down for Role name to select which role you are assigning. You can enter an effective from date and to date if it's a temporary assignment or proxy assignment or let the effective from date default. You also need to assign the type of assignment this is if it is a Primary or Proxy assignment.

After you enter the information and hit Save you have assigned the role to that person.

Delete Role Assignment.

To delete a role you click the check box next to the role you want to delete as seen below then you click on the Delete Selected Role Assignments button.

It will ask you if you are sure you want to delete, click ok or cancel depending on what you want to do.



If you hit ok the role assignment will be deleted as seen below.