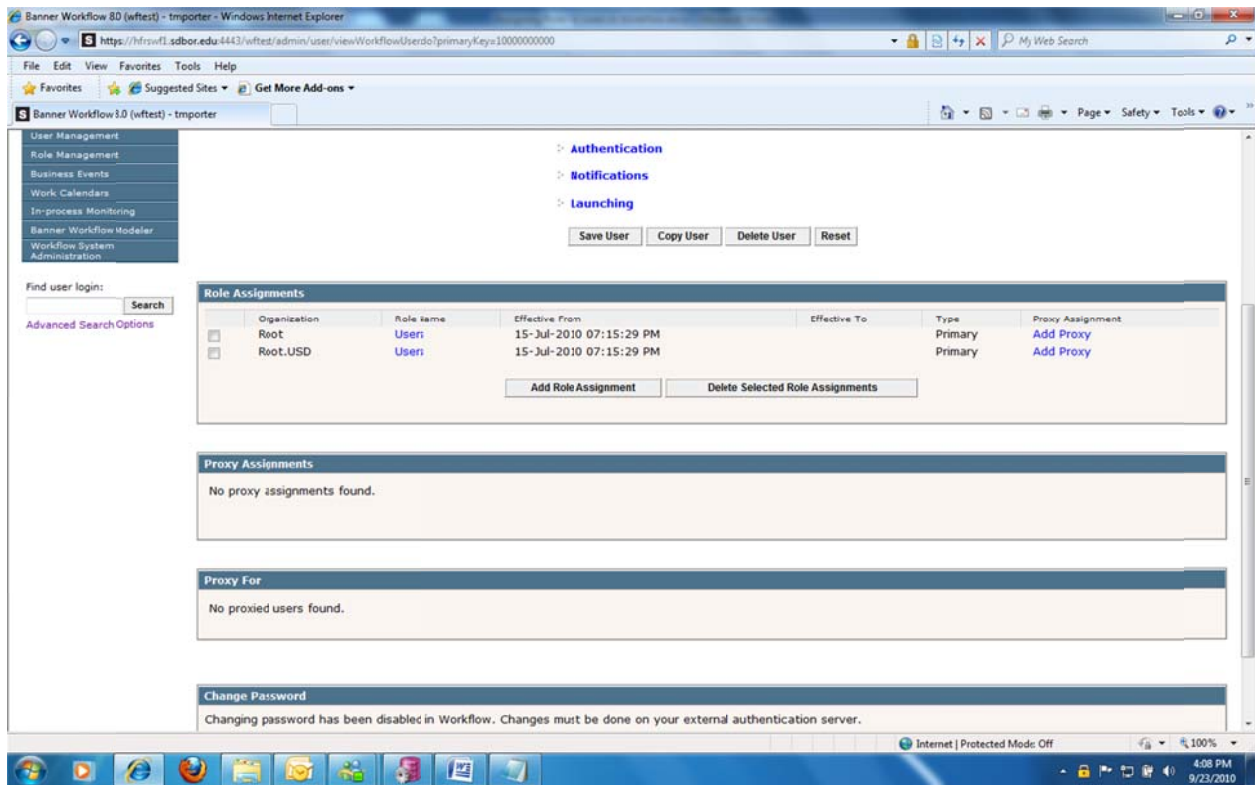


## Workflow User ID and Security/Role Setup Procedures (old name Assigning Roles to Users in Workflow)

Workflow User ID creation:

Every Friday afternoon a package is ran to create users that do not have a workflow id already. Their immutable 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 immutable 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:



The screenshot displays the Banner Workflow 8.0 (wftest) - tmporter interface in a Windows Internet Explorer browser. The address bar shows the URL: <https://frowf1.sdbor.edu:4443/wftest/admin/users/viewWorkflowUserdo?primaryKey=1000000000>. The interface includes a navigation menu on the left with options like User Management, Role Management, Business Events, Work Calendars, In-process Monitoring, Banner Workflow Modeler, and Workflow System Administration. The main content area shows a search bar for user login, a search button, and advanced search options. Below this, there are sections for Authentication, Notifications, and Launching, each with a corresponding button (Save User, Copy User, Delete User, Reset). The Role Assignments section contains a table with columns for Organization, Role Name, Effective From, Effective To, Type, and Proxy Assignment. The table lists two roles: Root (User) and Root.USD (User), both effective from 15-Jul-2010 07:15:29 PM. Below the table are buttons for Add Role Assignment and Delete Selected Role Assignments. The Proxy Assignments and Proxy For sections both indicate that no proxy assignments or proxied users were found. At the bottom, there is a Change Password section with a message: "Changing password has been disabled in Workflow. Changes must be done on your external authentication server." The Windows taskbar at the bottom shows the system tray with the date 9/23/2010 and time 4:08 PM.

Organization	Role Name	Effective From	Effective To	Type	Proxy Assignment
Root	User	15-Jul-2010 07:15:29 PM		Primary	Add Proxy
Root.USD	User	15-Jul-2010 07:15:29 PM		Primary	Add Proxy

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.

The screenshot shows the SNAP user interface. At the top left is the logo "YOUR FUTURE IS HERE" with "State of Missouri" underneath. The main header features the "SNAP" logo. Below the header, a navigation bar includes tabs for "Employee", "HR Forms/Policies", "My Benefits", "Workflow" (which is highlighted), "Help", "Resources", "My Tab", and "My BOR". The main content area is divided into several sections: "My Workflow Alerts" with a table for Instance Name, Date, and Process Name; "My Workflow Processes" with a table for Organization, Workflow Name, Activity, and Created Details; and "My Worklist" with a similar table. On the right side, there is a "Workflow" sidebar with sections for "Home" (containing links for Worklist, Workflow Status Search, and Workflow Alerts), "User Profile" (containing links for My Processes, User Information, and Change Password), and "Administration" (containing links for Business Component Catalog, Enterprise Management, User Management, Role Management, and Business Events). A "Worklist" section on the right shows a table with columns for Organization and Workflow, and a status "0 - 0 of 0" with navigation buttons for "First" and "Previous".

Click on User Management.

This screenshot shows the SNAP user interface with the "User Management" page open. The browser window title is "Internet Explorer" and the address bar shows a URL starting with "/tag\_d5da93a689fe2b96...". The navigation bar is the same as in the previous screenshot, with "Workflow" selected. The "User Management" page is displayed in the main content area, featuring a "Workflow Help" icon. It has two main sections: "Existing User Accounts" with the description "View and manage existing user accounts" and "New User Accounts" with the description "Create a new user account". The sidebar on the left remains the same, showing the "Workflow" section with its sub-links. The date "June 21, 2012" is visible in the bottom right corner of the page.

Click on Existing User Accounts

Employee HR Forms/Policies My Benefits **Workflow** Help Resources My Tab My BOR

### My Workflow Alerts

Instance Name	Date	Process Name
<a href="#">Show Alerts Page</a> <a href="#">Open Workflow</a>		

### My Workflow Processes

[Show My Processes Page](#)
[Open Workflow](#)

### My Worklist

Organization/Workflow Name	Activity	Created Details
<a href="#">Refresh</a> <a href="#">Show Entire Worklist</a> <a href="#">Open Workflow</a>		

### Workflow

**Home**

- Workflow
- Workflow Status Search
- Workflow Alerts

**User Profile**

- My Processes
- User Information
- Change Password

**Administration**

- Business Component Catalog
- Enterprise Management
- User Management
- Role Management
- Business Events
- Work Calendars
- In-process Monitoring
- Banner Workflow Modeler
- Workflow System Administration

**Search**

### User Management

## User Search

**Search**

Logon ID:

Last Name:

First Name:

Middle Name:

Email:


Effective From:

Effective To:

Enabled:

Unknown Zone (Mixed) | Protected Mod

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.



# SNAP

[Back to Workflow Tab](#)

## Workflow

**Home**

- Workflow
- Workflow Status Search
- Workflow Alerts

**User Profile**

- My Processes
- User Information
- Change Password

**Administration**

- Business Component Catalog
- Enterprise Management
- User Management
- Role Management
- Business Events
- Work Calendars
- In-process Monitoring
- Banner Workflow Modeler
- Workflow System Administration

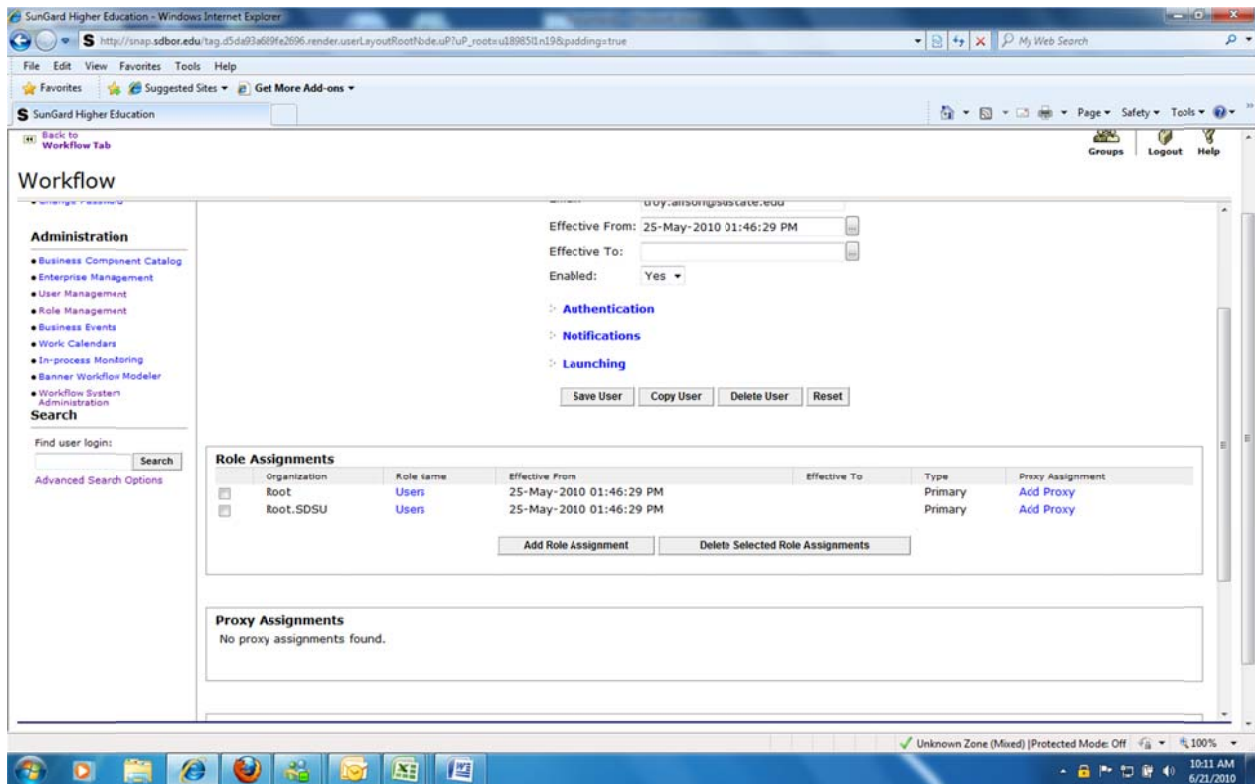
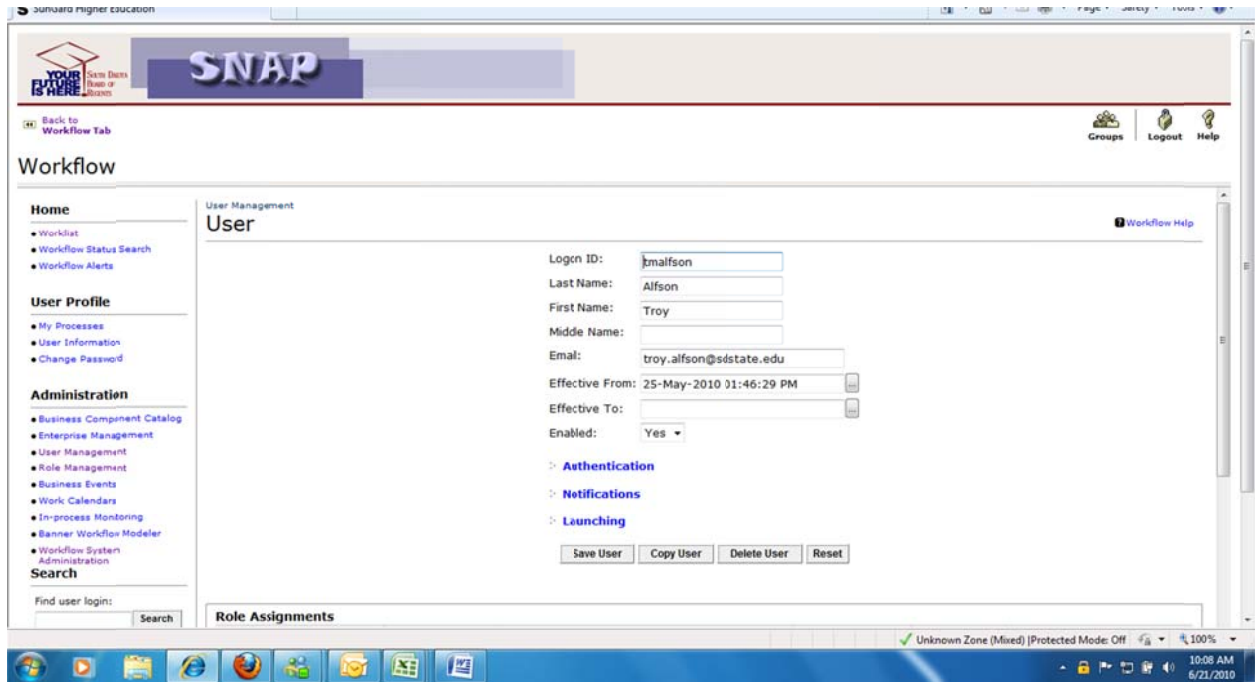
### User Management

## User Search Results

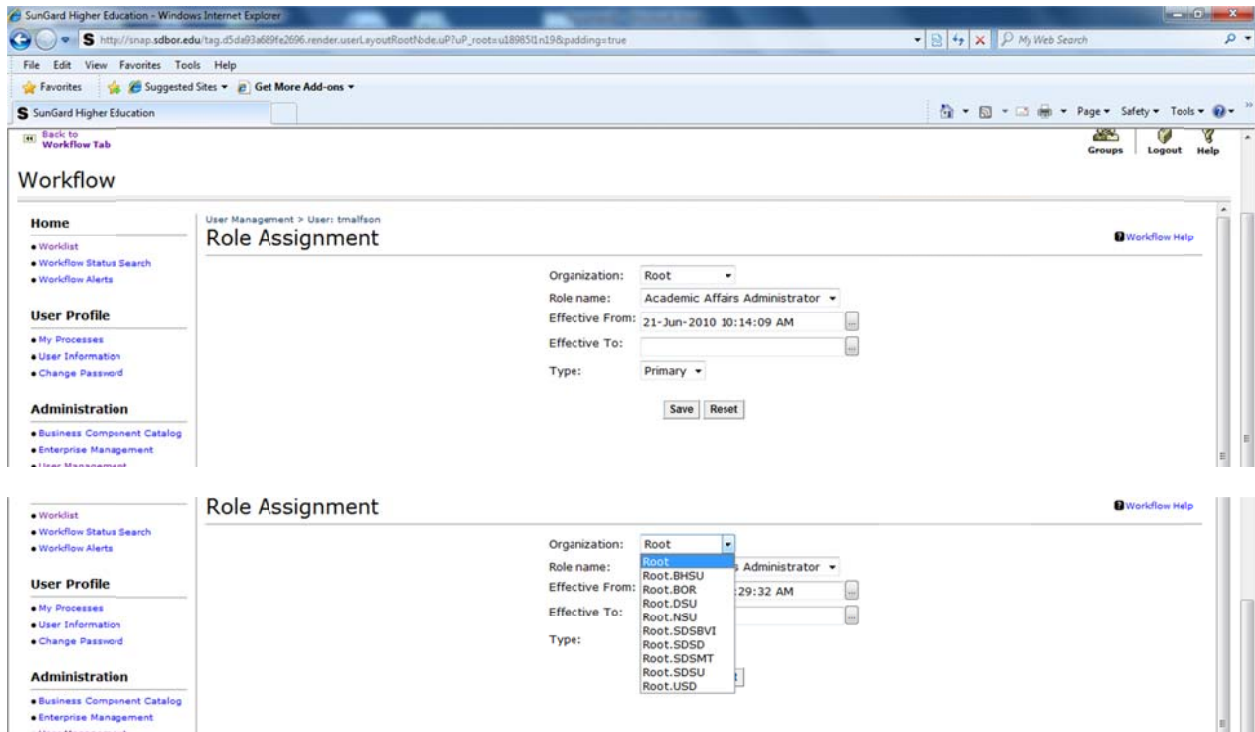
Logon	Last Name	First Name	Email	Eff
<a href="#">tmalfson</a>	Alfson	Troy	troy.alfson@sdstate.edu	25:01
<a href="#">tmbeare</a>	Beare	Tianna	tianna.beare@sdstate.edu	25:01
<a href="#">tmberner</a>	Berner	Todd	todd.berner@northern.edu	25:01
<a href="#">tmbirgen</a>	Birgen	Taylor	taylor.birgen@usd.edu	25:01
<a href="#">tmboldt01</a>	Boldt	Tina	tboldt@pluto.dsu.edu	25:01
<a href="#">tmbunke</a>	Bunke	Tasha	tasha.bunke@sdsbvi.northern.edu	25:01
<a href="#">tmchambers</a>	Chambers	Terry	terry.chambers@northern.edu	25:01
<a href="#">tmcheesbrough</a>	Cheesbrough	Thomas	thomas.cheesbrough@sdstate.edu	25:01
<a href="#">tmcrompton</a>	Crompton	Tina	tina.crompton@sdstate.edu	25:01
<a href="#">tmdelfinis</a>	Delfinis	Teresa	teresa.delfinis@sdstate.edu	25:01

1 - 10 of 45 | [First](#) | [Previous](#) | [Next](#) | [Last](#) | [Go to page: 1](#)

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.



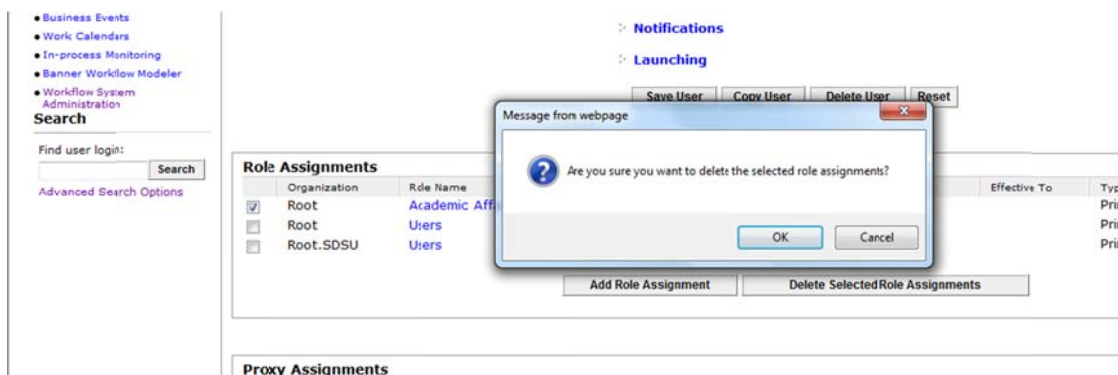
From this screen you can click the drop down for the Organization and select which organization the role assignment is for and then click on the drop down for Role name to select which role you are assigning. You can enter an effective from date and to date if it's a temporary assignment or proxy assignment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

: Launching

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**Role Assignments**

	Organization	Role Name	Effective From	Effective To	Type
<input type="checkbox"/>	Root	Users	25-May-2010 01:46:29 PM		Primar
<input type="checkbox"/>	Root.SDSU	Users	25-May-2010 01:46:29 PM		Primar

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**Draw Assignments**