Working with Secured and Role Based Task Views

Abstract: This document detail setting up and maintaining secured and role based task views.
OneWorld Xe, ERP8, EnterpriseOne 8.9 9th September 2003

Overview

Solution Explorer task views are setup one of four ways.

- Neither Secured nor Role Based
- Secured - Allowing it to be secured from the users view depending on their 'explorer' security setting.
- Secured and Role Based - Allowing you to either hide or show using roles, as well as, securing it from the user depending on their security setting.
- Role Based - Allows you to setup multiple groups for users to be able to log into Solution Explorer, and to see only what you grant them access to.

The creation of multiple task views basically creates a menu system, which Solution Explorer is replacing. The idea behind Solution Explorer is that you will use only a minimum number of task views (1 or 2 for the end user) and then apply roles to these task views. For example, you can assign the use of the task views Favorites and End User Tasks to the user. By using Fine Cut and role definitions to narrow down what the user can access, they will only see those tasks assigned to their roles. This prevents the need to create and maintain many different task views. Any task view(s) that a user(s) should not be able to access can be marked as secured.

In the pictures below, we see a demonstration of this concept. As you can clearly see, the user on the left has access to all task views, where as, the use on the right has access to only a few, as well as, they only have access to the General Accounting folder because of their role settings.
Within this setup, users still have the flexibility to create custom views and tasks by sending them to their favorites. That way, they can still create them the way they wish to see them, and it will be the user who creates and maintains this rather than the system administrator. Once a role is assigned to a user, they are only able to access items on the task views that are associated with their role. Within this role, they can do a right click and send to or link to their favorites. Thus allowing them to have a view customized for themselves without compromising security or creating more work for the administrator.

Working with Secured Task Views

Marking a Task View as being secured may hide that Task View for a user depending on that user’s security settings. If the Task View is marked as secured and the user only has View security for Solution Explorer then the user will not be able to see the Task View. If the Task View is marked as secured and the user has Add or Change security for Solution Explorer then the user will be able to see the Task View. This setting can be used simultaneously with a Role Based Task View.

Using secured based Task Views is the only way to completely remove a Task View from the list. If you use just a role based Task View, then you are able to use FineCut to remove all of the tasks, but the task view will still show in the list.

The secured task view option can be used when trying to keep users from accessing critical areas that may be necessary for only a user with administrative authority. For instance the Content Development Tools task view could be set as secured. That way users that log onto Solution Explorer with only View security will not be able to access this secured task view. They will only be able to access tasks that have been assigned to their default role and other roles that they have the ability to apply.

The secured task view cannot be used on a user role basis. You cannot define a task view as secured for one set of users and not secured for another. It is either a secured task view or it is not.

Working with Role Based Task Views

Roles are to Solution Explorer, what groups are to OneWorld® Explorer. Roles are assigned to each user, with each one having a system and default role (should be the same role). These roles can then be applied, by the end user, to activate particular task views. In EnterpriseOne 8.9, both default and system role are replaced by *ALL. *ALL merges all roles assigned upon login.

There are two main ways to assign tasks to roles. One, is to use Fine Cut and the other is to use the Role Definitions application (P9035).

Fine Cut is used to quickly remove tasks from within a single task view.

The Role Definitions is used to assign or take away single tasks from many roles at one time. This application can be used to cut down the time of setting up roles.

For a more hands on approach, follow the steps in the example below to better understand how this all works.

What are the guidelines or thoughts between using variants vs. roles? Are variants more for the end user to make different views for themselves? Similar to user overrides?

One big difference between roles and variants is that roles apply to an entire role-based task view, whereas you can apply a variant to a task (and its children tasks) only within a non-role-based task view.

Additionally, roles are associated with security. So, by defining a role-based task view and setting up different roles, you can allow access to different sets of tasks depending on which role a user is assigned to.

Variants are used when not utilizing roles, and may be removed as a system feature in future releases of the software.

1) Add a Role Based Task View
Creating a new role-based task view. However, it is important to note, you can change any task view to be either secured and/or role-based by simply going into task revisions and selecting the radial button. Remember that task views are cached, so if you do change it, you will need to log off and back on for the changes to take effect.

2) Remove a Role from a Task

The following steps can be used to see which tasks are assigned to a specific role.

1. Highlight the task, right-click, and select 'Task Revisions'
2. From the 'Form' menu exit, then select the option for 'Roles'
3. Find the task view and double-click or select it
4. The 'Role Definition' form appears, and roles assigned are preceded by a green check mark.
   - All of the Roles that have green check marks next to them have the selected task available. All of the ones that do not have checkmarks, do not have this task available as part of the role.
5. To change the role's status, either double-click on the gray box (may or may not have a green check mark in it), or highlight the row and then select the 'Row' menu exit and 'Change Status'.
6. When exiting, you will press close on the 'Role Definitions' (P9035) form. This will put your selections into memory. However, you must click OK on the task revisions form in order for it to be saved to the database. If you click cancel, then none of your changes will be written to the database.

3) Hide a Task for a Role

When using Fine Cut, it is important to remember that any changes you make will be directly reflected upon the role that you have applied.

Steps for using Fine Cut

1. Make sure a role has been assigned to the user making the changes (This will normally be done by a System Administrator. You can assign or remove the roles to and from yourself as necessary to setup the roles.
2. Apply the role
3. Depress the Fine Cut button on the toolbar
4. Either red x or green checkmark the tasks. The red x will hide the task and all of its children. Whereas, a green check will show the task and its children. A red x on a higher level branch does not cause the lower branches to have x’s. However, it does prevent them from displaying.
5. Save the role (Note: There appear to be two ways to save a role. You should be using #2.)
   1. Press the save button on the toolbar. This will overwrite the settings for the entire system. If you log in without a role applied, the items you have selected to hide, will be gone. (This is fixed in EnterpriseOne 8.9, but using Save Role is still recommended.)
   2. Right click and choose save role. Then either save it as the one you are currently working on, or add a new one on the fly. For instance, you could start with the JDE shipped role, customize it to meet your needs, and then save it as a different role.

   **Note:** If you choose to save the role by selecting save role, you will still be prompted to save your current changes to the role you have applied. In order to prevent overwriting the existing role simply select "No" when exiting Fine Cut.

4) Attach a Role to a User ID

The application used to assign roles is Work with Role Relationships (P95921) found under the Content Development Tools task view.

Roles are similar to groups, however, unlike groups, a user can be assigned multiple roles. The end user can then apply the role, depending on the duties that they are performing. These roles are setup first by the administrator.

When assigning roles, there is an option for
• **beginning date** - Required field
• **end date** - not required to enter anything here. No end date is the default. An example of when an ending date might be utilized is when you are doing year-end processing. You may have a role set up that shows necessary year-end tasks, but after year-end is finished, you don't want the user to continue to access these tasks. Therefore, you place an ending date for when the process will be finished. Another example of using an ending date would be for a consultant who will only be on-site for a specific amount of time. An ending date can be given to their role to coincide with their departure date. (Note: This is fixed in SARs 6083791, 6110614, 6366759.)
• **system role** - Can only have one, not required. Selected to be the same role as the default role, Xe and ERP8 only.
• **default role** - Can only have one, not required. Selected to be the same role as the system role, Xe and ERP8 only.
• **ALL** - Checked for all roles assigned to user that you want to include in their *ALL login. If not checked, then user will have opportunity to log into only this role or *ALL

**Default vs. System roles in Solution Explorer (Xe and ERP8 Only):**

Originally, system role was to be used in a new phase of roles enhancements. It was to be the role that the user was always assigned to as far as security, OCM, and Database authorities go. The roles that were set up in-house (OWTOOL, OWQA, etc.) did not mean much to the portal where roles were being used in Xe and ERP8.0. Therefore, the portal wanted the ability to have a default role that was to be different than the system role and would have a more meaningful name. Both concepts have been removed in the next phase of roles to be delivered with the release of EnterpriseOne 8.9.0.

You can only have one default and one system role per user.

**Additional EnterpriseOne 8.9 Functionality**

The creation of roles has changed somewhat between Xe/ERP8 and EnterpriseOne 8.9. If you have been using Xe and ERP8, you know that roles are stored in the UDC table H95|RL, and that the role is only used with role based task views and the user’s login for these task views. However, with EnterpriseOne 8.9, the roles feature is fully integrated into the software. Roles are used in the setup of security in Security Workbench and User Security. They are created and maintained in User Profiles, and used when defining activity rules within Object Management Workbench. Roles are no longer stored in the H95|RL UDC table, but rather in the User Profile table F0092. Since this is a system table, there will no longer be a need to promote these roles. However, there will be a setting that determines which environment the role can be used in. We will go into this in more detail later. Please note; the relationships still need to be promoted from one environment to another. This can be done using either OMW or the P9864a.

**Role Description**

This application, found on the row exit for Work with Users/Roles Profiles (P0092), will allow us to set different language definitions for the roles. Once the alternate descriptions have been entered, when the user logs in with an alternate language preference; they will see the role description for their language rather than the domestic language description.

**Role Sequence**

This application, found on the form exit for Work with Users/Roles Profiles (P0092), allows you to sequence the roles in level of importance. Meaning, the the higher up the list, the security at that level will preceed one at the lower level. To resequence them, just drag and drop the role where you want it to be in the list. In order for changes to take affect, select the Form exit for Set Sequence. If changes were made and they need to be discarded, select Close Without Set Sequence.

**Role Environment**

Because of the Roles now being stored in the F0092 table, they are available across environments. However, some times, you may not want a role to be accessible to the user in one environment, but would like for them to have access in another. (i.e. access to objects within the DV or PY environments versus the PD environment.) That is why roles are still setup as environment
specific. In order to make the role available in another environment, you have to assign the role to that environment.

This application is found on the row exit for Work with Users/Roles Profiles (P00929). Just fill out the grid with the environments you want the role to be available in, and sequence them using either 1, 2, 3... or a spacing such as 5, 10, 20....

**Enable Roles Chooser**

Select the Enable Roles Chooser form exit within the Work with Role Relationships (P95921) to allow users to log in under a specific role. If this is not selected, then the user will only be able to log in under *ALL.

**Roles Delegation**

Select Roles Delegation form exit within the Work with Role Relationships (P95921) to allow users to delegate their role responsibility to someone else. Roles delegation is very similar to work with role relationships. However, the difference is that you are delegating certain roles from your own user setup to someone else. For instance, if a user is going on vacation for a week, then that users role could be delegated to the user that will do that job during that week. Thus delegating the ability for a user to do that persons job for a set period of time. Upon returning from vacation, the delegation of the role can be removed by using the Remove button in the Work with Delegation Relationships form.

**Part I**

1. Go to the 'End User Tasks' task view (Note: The task will read something like End-User Tasks/Role Applied, where role applied, is the currently applied role. This will probably be either your default or *ALL role)
2. Right click | Select Apply Role (In EnterpriseOne 8.9, this is "view by role")
3. This will bring up the P9035 (Role Definition) (EnterpriseOne 8.9 - P95921 View by Role) application. The only roles that show up are the ones that are assigned to you within the 'Work With Role Relationships' application.
4. Close out of this application and go to the 'Content Development Tools' task view.
5. Launch the 'Work with Role Relationships' (P95921) application
6. Put in your user ID | Press 'Find' (Remember, you cannot use groups, and they are completely removed as of EnterpriseOne 8.9.)
7. On the right side, you will find all available roles in the system. On the left, you will notice, are the same roles that we saw in the earlier step when we selected to apply role. Lets add a role to our user ID by selecting it on the right hand side and then click the green arrow to the left.
8. Put in today’s date | Press ok
9. Close out of the 'Work with Role Relationships' application.
10. Go back to 'End User Tasks' task view (Note: depending on your SP level, you may have to log off and back on in order to see the changes.)
11. Right click | Apply Role (View by Role in EnterpriseOne 8.9)
12. Select the role we just assigned.

**Part II -** The assigning of these roles is possible because we shipped the software with fifty or so already created roles (Xe, ERP8). You can choose to use the roles we shipped, customize them, or use them as a template for creating your own. If you are upgrading to EnterpriseOne 8.9, then you should see roles as part of the upgrade process. If not, the next steps will allow you to create a new one.

This next segment goes through the steps of setting up a new one using the JDE one as a template. If you do not have one to use as a template, just start with what you have, and then make changes and create the new one.

1. Along the toolbar, depress the FineCut button. This will bring up your list of tasks, and it will either display with a red x or a green check depending on whether or not it is shown or hidden.
2. Hover your mouse over a task, and you will be able to see it change from red to green depending on the tasks hide/show properties.
3. Double click, or select a task and then press either enable or disable depending on the available option.
4. After making your changes, right click and choose Save Role
5. Now you can either save the role as the one we have been working with, or you can create a new one. For our example, we are going to create a new one. Therefore, press the add button, and just enter in a name of TEST.
6. After adding the new role, find it in the list, and save your changes to it.
7. Once you have saved it, depress the FineCut button.
8. Click No, you don't want to save your changes. (Remember, we just saved it to TEST, if you look at the message, it wants to save it to the task we started out on.)
9. If the hide/show button is depressed, select it so that you only see the items that you have chosen to view.
10. Since we added a new role, we need to go back and assign it to ourselves so that we can finish setting it up and testing it. Therefore, go to the content development Tools task view.
11. Launch the 'Work with Role Relationships' (P95921) application
12. Put in your user ID | Press 'Find'
13. On the right side, enter in TEST and click find.
14. Highlight the role and click the left arrow to add it to your ID. Enter in today's date and for EnterpriseOne 8.9 select *ALL.
15. Go back to 'End User Tasks' task view (Depending on SP level, you may have to log off and back on.)
16. Right click | 'Apply Role'
17. Select your role from the list.

Part III - Goes through updating a task by using Task Revisions. It works very well when setting up a specific task or while adding a new task.

1. Highlight the task | right click | select 'Task Revisions'
2. From the 'Form' menu exit, then select the option for 'Roles'
3. Find the task view you are working on, and then double click or select it
4. The Role Definition form appears, and roles assigned are preceded by a green check mark.
   o All of the Roles that have green check marks next to them have the selected task available. All of the ones that do not have checkmarks, do not have this task available as part of the role.
   o In EnterpriseOne 8.9, this is displayed differently. There are no longer green check marks. Rather, their is a field in the grid that indicates a "Y" or "N" for available or not.
5. To change the role's status, either double click on the gray box (may or may not have a green check mark in it), or highlight the row and then select the Row menu exit and Change Status.
6. When exiting, you will press close on the Role Definitions (P9035) form. This will put your selections into memory. However, you must click ok on the task revisions form in order for it to be saved to the database. If you click cancel, then none of your changes will be written to the database.