SECURITY ROLES AND USER GROUPS

BACKGROUND
• T&E 9 utilizes a single security role assigned to user to determine what menu options user has
• T&E 9 factors in user licensing to suppress options user does not have seat license for
• T&E 10 utilizes CP framework User Groups to control menu options
• CP framework allows user to be assigned to multiple user groups

CHALLENGE
Provide clients ability to automatically assign T&E users to the appropriate user groups based on T&E security role and licensing

CP USER GROUP CONCEPT

All Inclusive User Groups
• Example
• Employee User Group
  • Desktop
  • Manage Work Schedule
  • Manage Timesheet
  • Manage Expense Report
• Manage User Group
  • Desktop Manage Work Schedule
  • Manage Timesheet
  • Manage Expense Report
  • Manage Resource Work Schedules
  • Manage/Approve Timesheets
  • Manage/Approve Expense Reports

Additive User Group
• Example
• Employee User Group
  • Desktop
  • Manage Work Schedule
  • Manage Timesheet
  • Manage Expense Report
• Manage User Group
  • Manage Resource Work Schedules
  • Manage/Approve Timesheets
  • Manage/Approve Expense Reports

• T&E Security Roles would only need to be associated to ONE User Group
• T&E Security Roles would be mapped one or more User Groups
ADDITIVE EXAMPLE

Examples of T&E Security Roles
- Employee
- Manager
- Administrator
- Project Manager

Examples of User Groups
- Employee – Time
- Employee – Expense
- Employee – Self Service
- Manager – Time
- Manager – Expense
- Manager – Self Service
- Project Manager – Time
- Project Manager – Expense
- Administrator – Time
- Administrator – Expense
- Administrator – System
- Everyone

ADDITIVE MAPPING EXAMPLE

Examples of T&E Security Roles

- Employee
- Manager
- Administrator

Examples of User Groups

- Employee – Time
- Employee – Expense
- Employee – Self Service
- Manager – Time
- Manager – Expense
- Manager – Self Service
- Project Manager – Time
- Project Manager – Expense
- Administrator – Time
- Administrator – Expense
- Administrator – System
- Everyone

T&E SECURITY ROLES SETUP

After creating user groups in CP framework.

Update T&E security roles to indicate the following:
• User Groups that should be assigned to users for each specific security role
• Indicate whether user group should be assigned based on seat license of Time or Expense. None means user group will be assigned regardless of seat licenses.
When user account is created, the system will take into consideration the person's security role and seat license to assign user to proper user groups.

Scenario - User Security Role Changed to Manager
When security role is changed, the system will remove employee from appropriate user groups based on old role and then add them to user groups based on new role and user license.

Scenario - User Granted Access
System will look at security role for the user groups the user must be placed in taking access into consideration (Insert where missing).

Scenario - Remove User Access
System will look at security role for the user groups the user must be removed from taking access into consideration.