AD14 Using the User Admin Workflow

I. Purpose:

This document explains how to manage Users and groups using the OWP User Admin Workflow. Specifically, the procedure describes how to add new users, add a User to groups, remove a User from groups, delete a User.

II. Who can do this procedure:

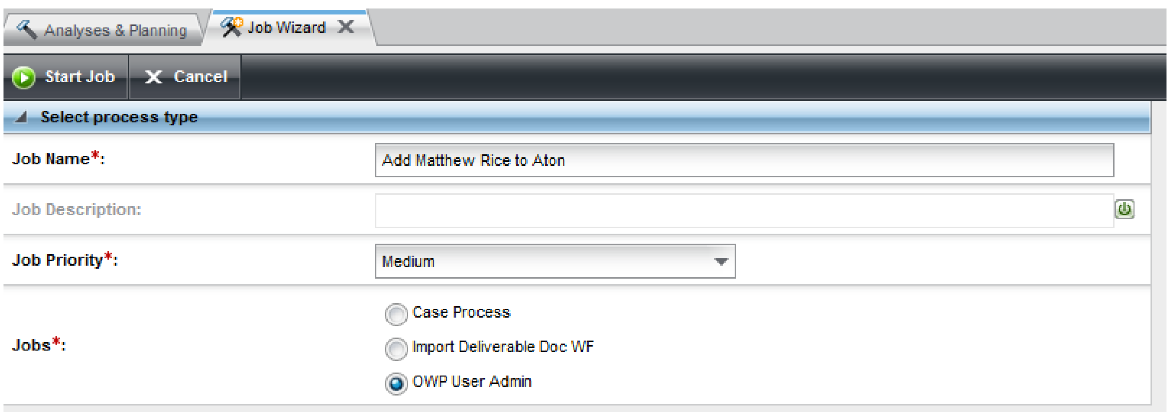
Persons who are RMS administrators.

III. Caveats

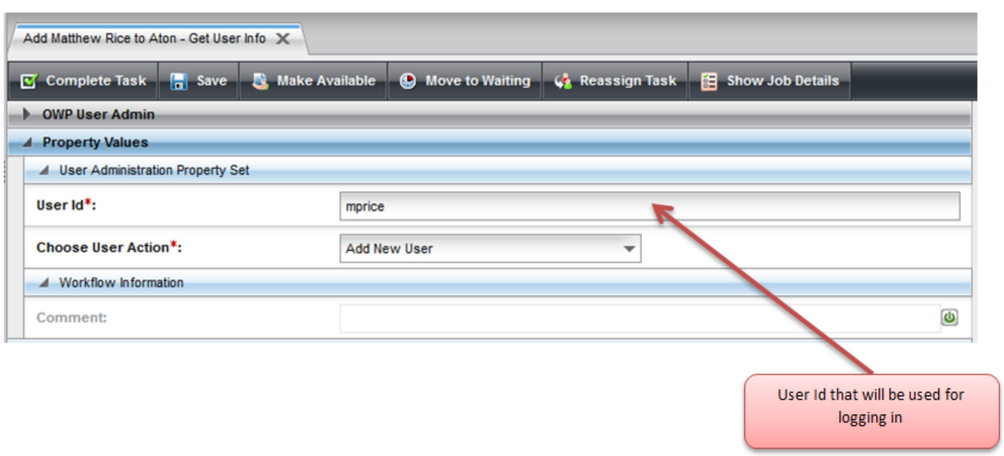
- A User who is "deleted" still retains View-Only rights, if he/she has general LDAP permissions.
- In "Removing a User from Groups", there is one step that is not intuitive. Be very careful.

IV. Procedure:

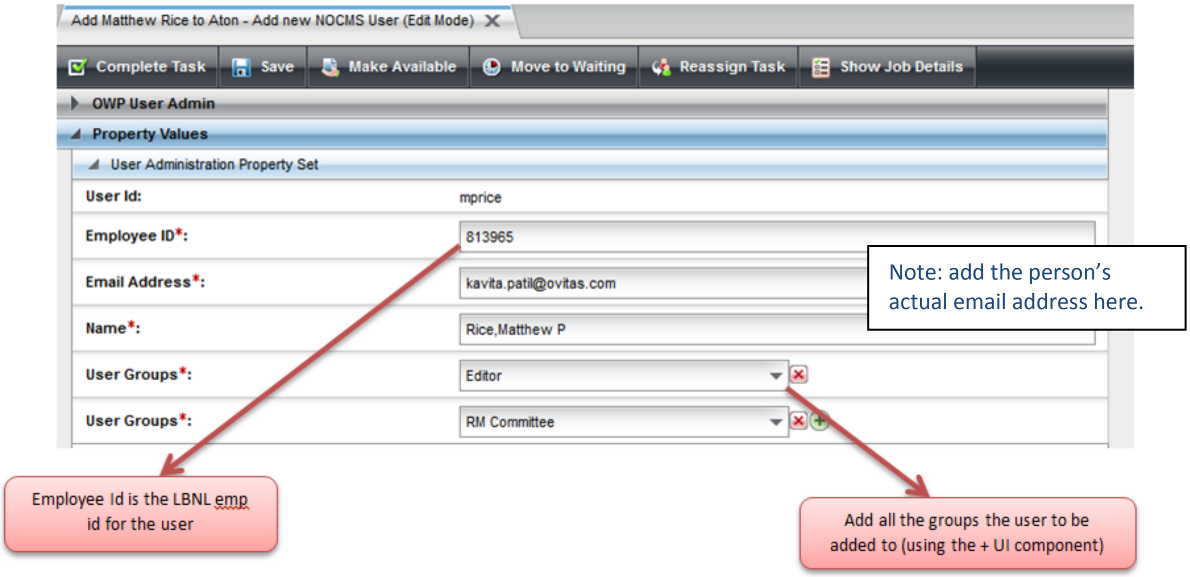
1. ***Adding an existing LDAP user to RMS***
   a. Start a new Job



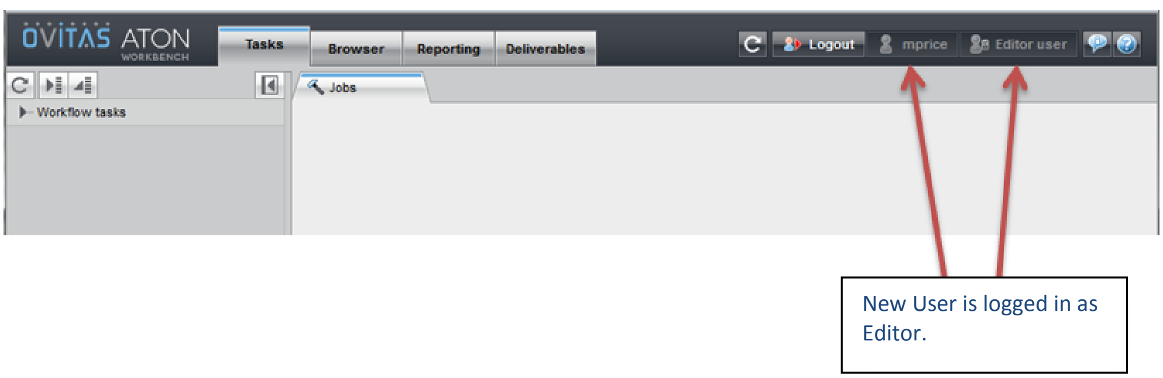
   b. Enter the User Id and Action
   Example: Add "Rice,Matthew P" who has a LDAP id. Enter the first part of his email address.



c. Get User Info from LBNL directory. This is a one step process to add user and the groups associated with the user.

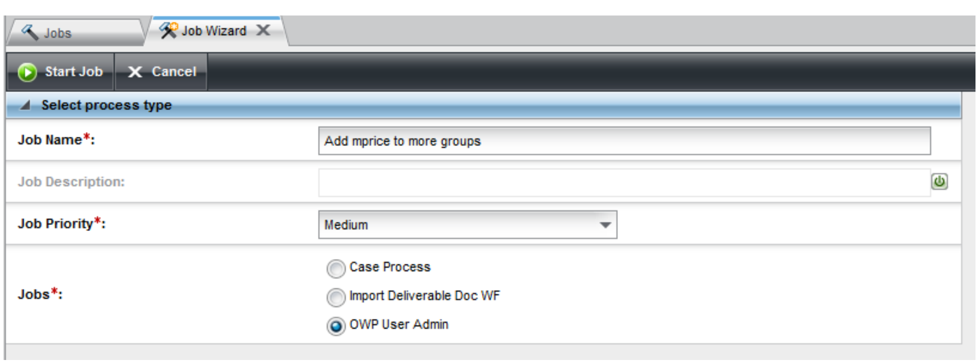


d. Verify!! New User added to the system logs into RMS. (You may have to ask the New User to do the checking!!)

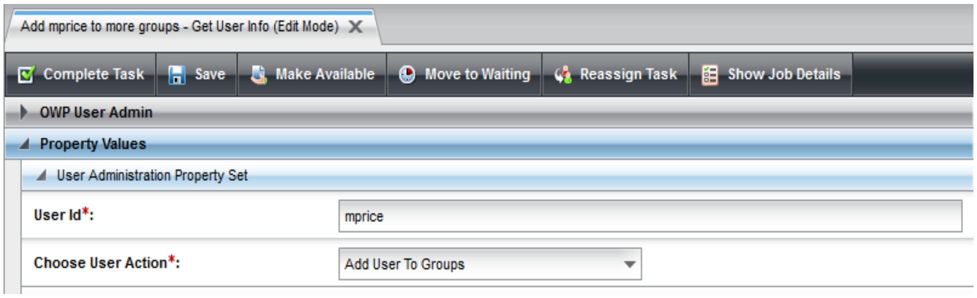


2. ***Adding an existing RMS User to additional groups.***

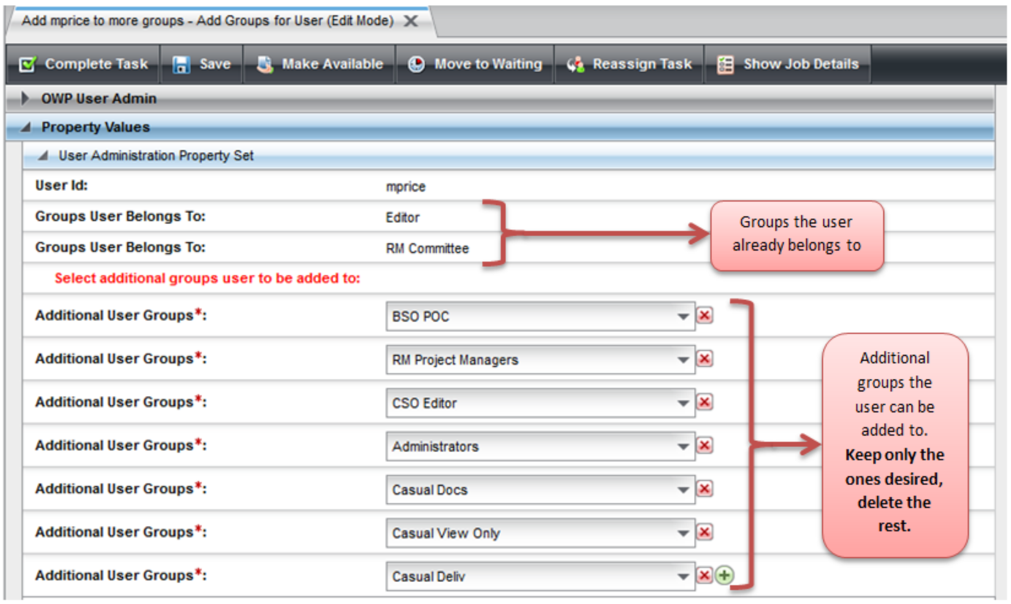
a. Start a new job



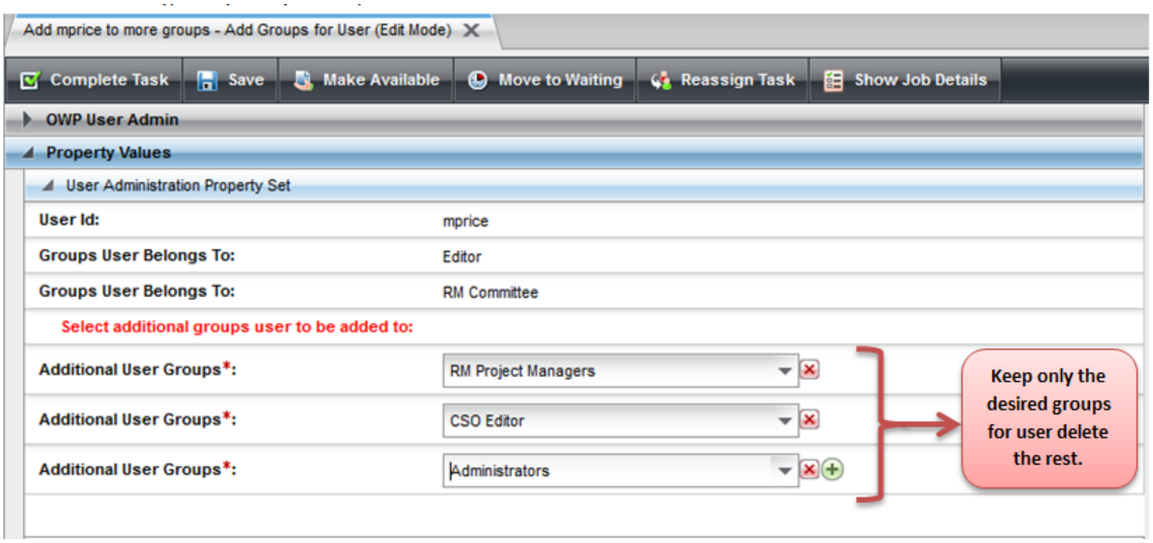
b. Enter User ID and Action



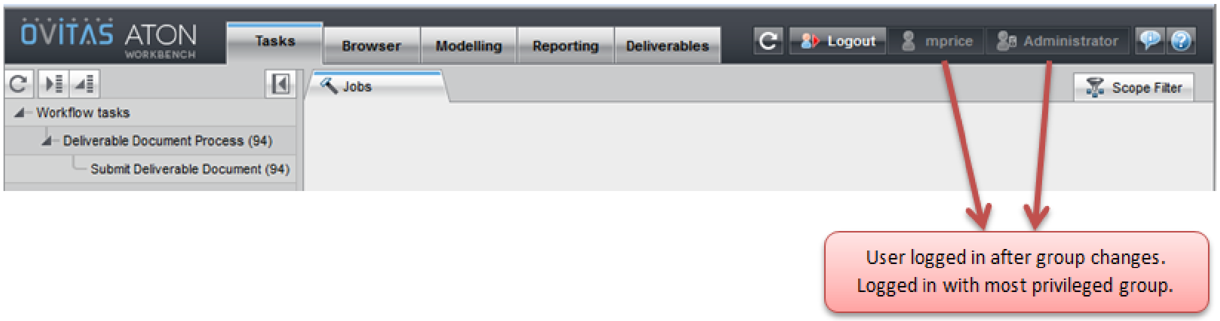
c. Window to enter additional groups for user:



Example: To add mprice to 3 additional groups (RM Project Managers, CSO Editor, Administrators), keep only those, delete the rest.

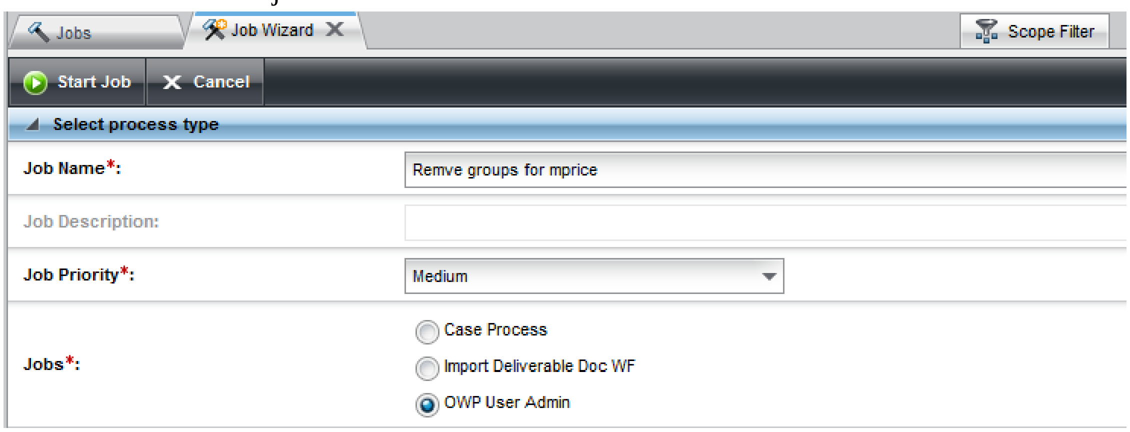


d. VERIFY!! In this case, the User was assigned to a higher permission level (Administrator), and the log-in reflects this now.

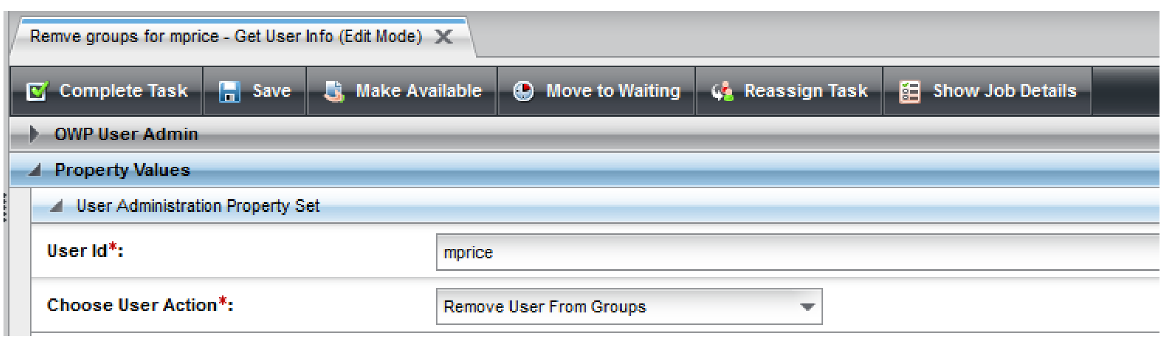


3. *Removing an existing RMS User from some groups*

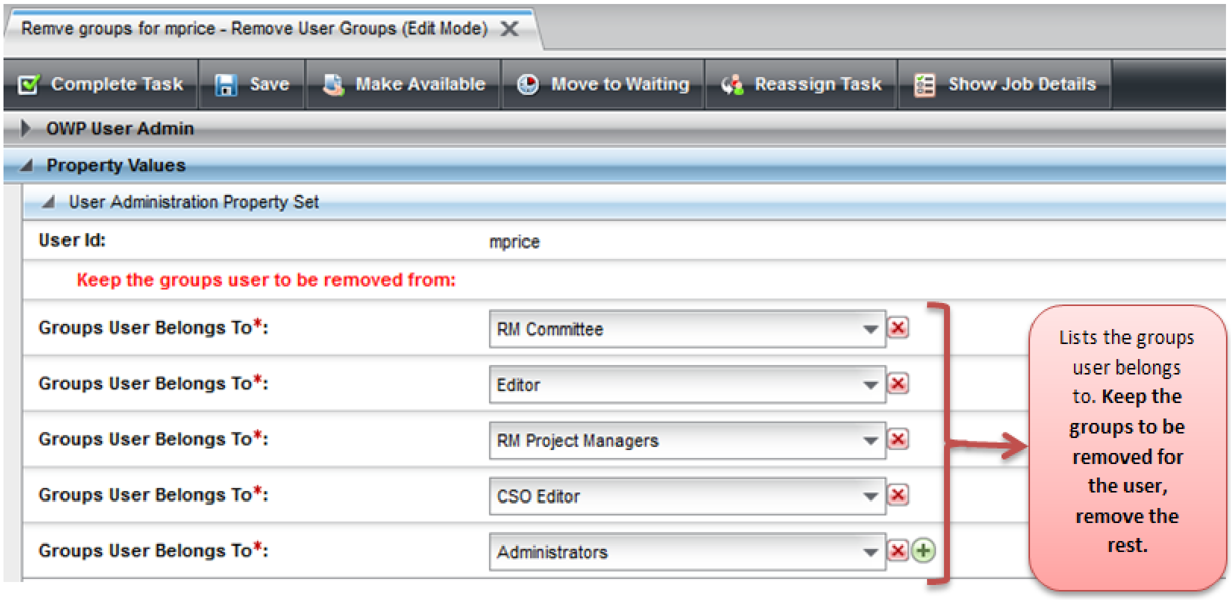
a. Start a new job.



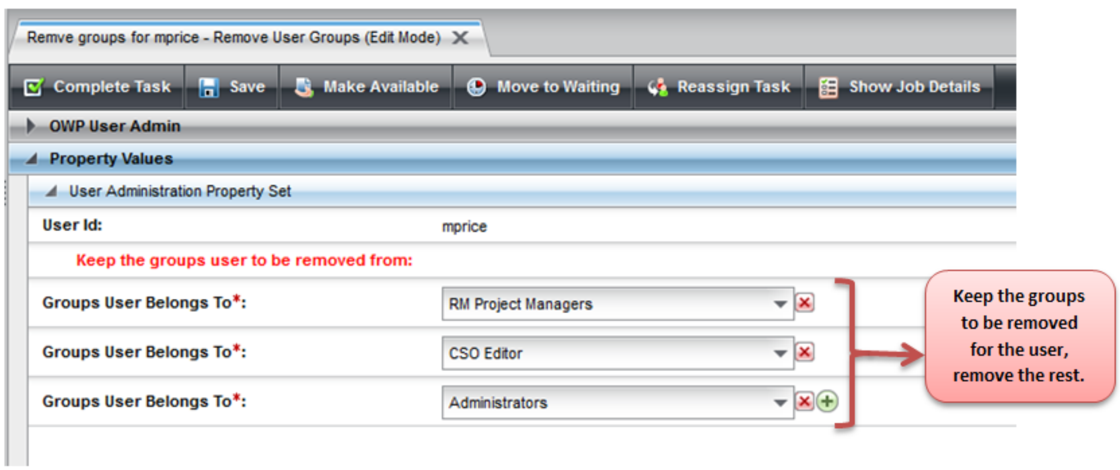
b. Select the User ID and Action



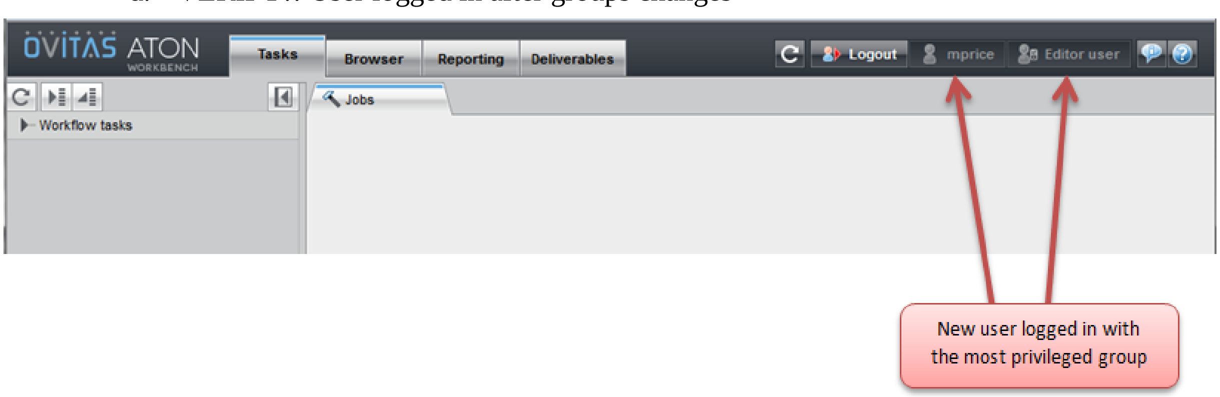
c. Window to remove user from groups, it lists all the groups the user currently belongs to



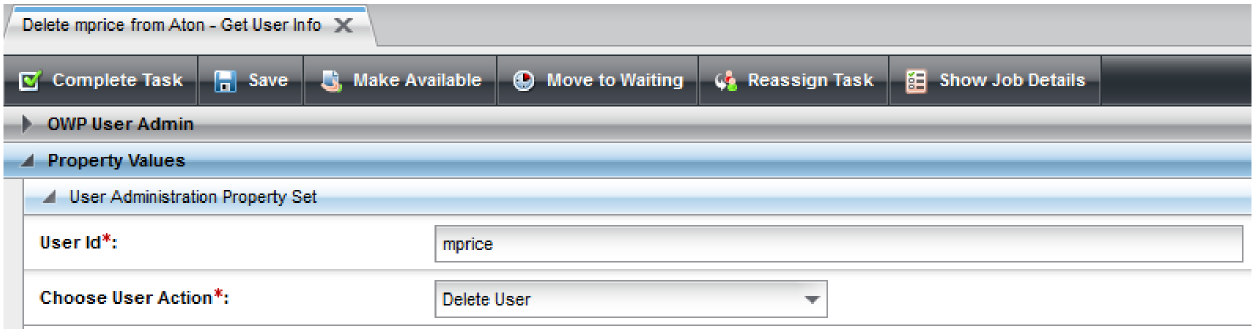
Example: Remove mprice from 3 groups (Administrators, CSO Editor and RM Project Managers) This is the tricky (non-intuitive) step!!! Leave in the list the groups the User is to be removed from.



d. VERIFY!! User logged in after groups changes



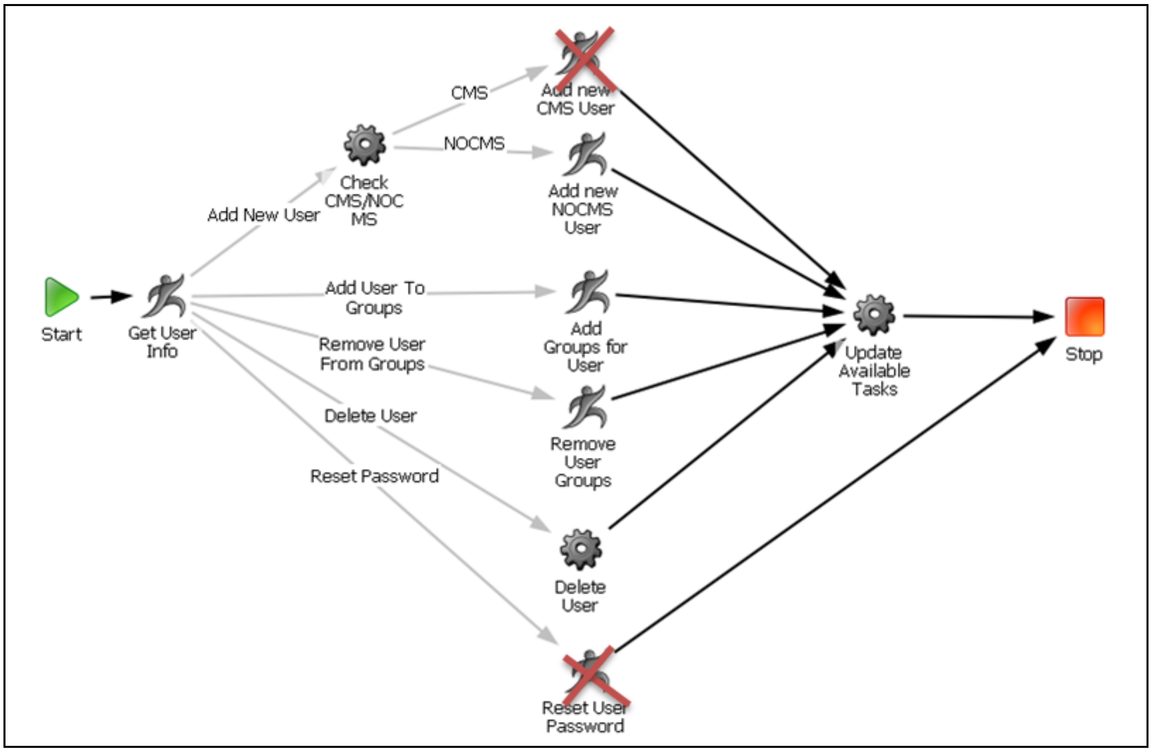
4. ***Remove an existing RMS user (Retains general View Only permissions)***
    a. Start a new job as previously.
    b. Enter User ID and Action.



    c. The User will be able to access the system as View-Only

5. ***Notes:***
    a. If a User is already in the system, "Add New User" will give an error message.
    b. If a User is not in the system, "Delete User" will give an error message
    c. CanNOT remove a user from ALL groups. User must be assigned to at least one group. Select "Casual View Only" as default setting.
    d. The Employee id entered in the New User form MUST match LDAP, otherwise alerts may not go out.
    e. There is NO RESET USER PASSWORD capability

Workflow Map (Transitions not used in LBNL crossed out)



V. Revision History

Revision	Date	Who	Description
0	12-22-2014	L.J. Young	Initial