

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.

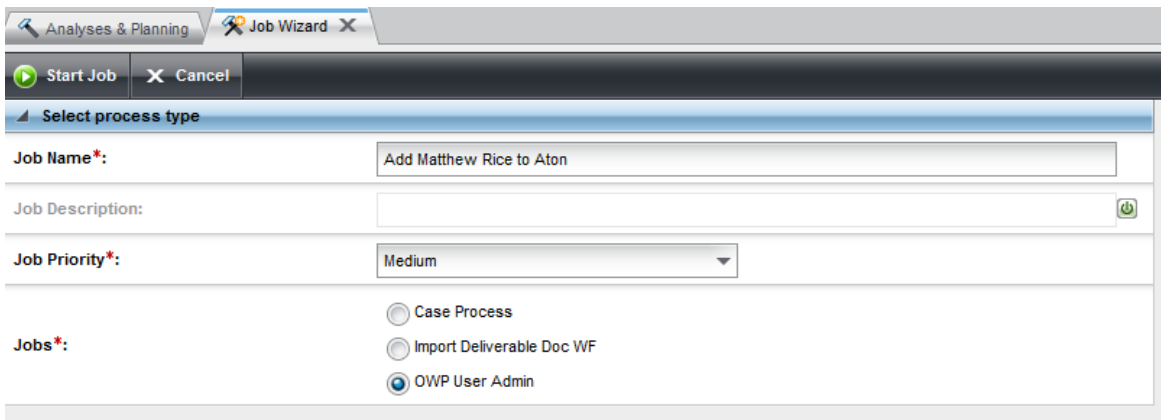
III. Caveats

- 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

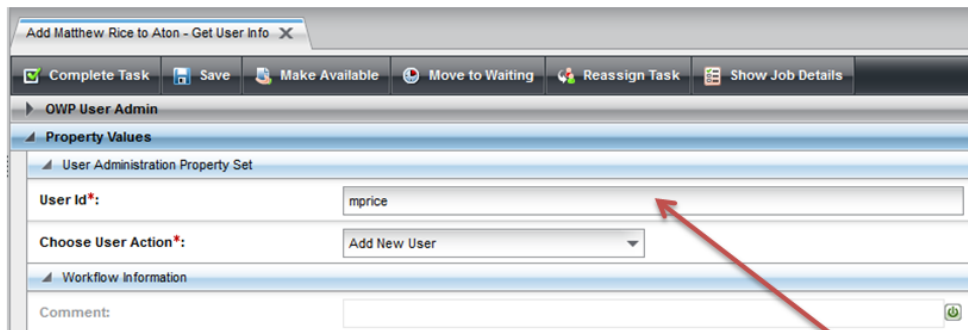


The screenshot shows the 'Job Wizard' interface. At the top, there are tabs for 'Analyses & Planning' and 'Job Wizard'. Below the tabs, there are buttons for 'Start Job' and 'Cancel'. The main area is titled 'Select process type'. It contains the following fields:

- Job Name*:** Add Matthew Rice to Aton
- Job Description:** (empty field with a green power icon)
- Job Priority*:** Medium (dropdown menu)
- Jobs*:** Three radio buttons: 'Case Process', 'Import Deliverable Doc WF', and 'OWP User Admin' (selected).

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.



The screenshot shows the 'Get User Info' interface. At the top, there are tabs for 'Add Matthew Rice to Aton - Get User Info'. Below the tabs, there are buttons for 'Complete Task', 'Save', 'Make Available', 'Move to Waiting', 'Reassign Task', and 'Show Job Details'. The main area is titled 'OWP User Admin'. It contains the following fields:

- Property Values**
 - User Administration Property Set**
 - User Id*:** mprice
 - Choose User Action*:** Add New User (dropdown menu)
 - Workflow Information**
 - Comment:** (empty field with a green power icon)

User Id that will be used for logging in

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

Employee id is the LBNL emp id for the user

Note: add the person's actual email address here.

Add all the groups the user to be added to (using the + UI component)

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

New User is logged in as Editor.

2. Adding an existing RMS User to additional groups.

- a. Start a new job

Job Name*: Add mprice to more groups

Job Priority*: Medium

Jobs*: Case Process Import Deliverable Doc WF OWP User Admin

b. Enter User ID and Action

The screenshot shows the 'Add mprice to more groups - Get User Info (Edit Mode)' window. The 'User Administration Property Set' section contains a 'User Id*' field with the value 'mprice' and a 'Choose User Action*' dropdown menu set to 'Add User To Groups'. The top toolbar includes buttons for 'Complete Task', 'Save', 'Make Available', 'Move to Waiting', 'Reassign Task', and 'Show Job Details'.

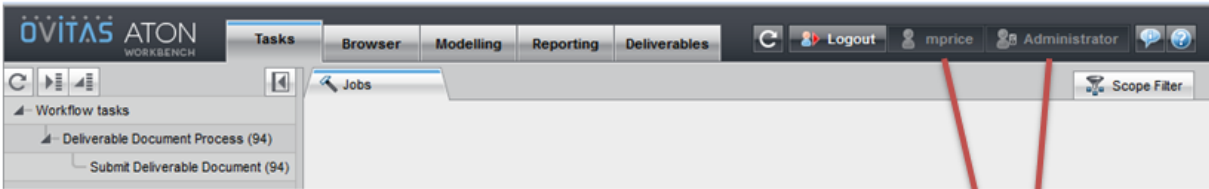
c. Window to enter additional groups for user:

The screenshot shows the 'Add mprice to more groups - Add Groups for User (Edit Mode)' window. The 'User Administration Property Set' section shows 'User Id: mprice', 'Groups User Belongs To: Editor', and 'Groups User Belongs To: RM Committee'. Below this is a section titled 'Select additional groups user to be added to:' with seven 'Additional User Groups*' dropdown menus. The first two are 'BSO POC' and 'RM Project Managers'. The next three are 'CSO Editor', 'Administrators', and 'Casual Docs'. The last one is 'Casual Deliv'. Red annotations include a bracket pointing to the existing groups with the text 'Groups the user already belongs to', and another bracket pointing to the dropdown menus with the text 'Additional groups the user can be added to. Keep only the ones desired, delete the rest.'

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

This screenshot shows the same 'Add Groups for User' window as above, but with the 'Additional User Groups*' dropdown menus set to 'RM Project Managers', 'CSO Editor', and 'Administrators'. A red bracket points to these three selected groups with the annotation 'Keep only the desired groups for user delete the rest.'

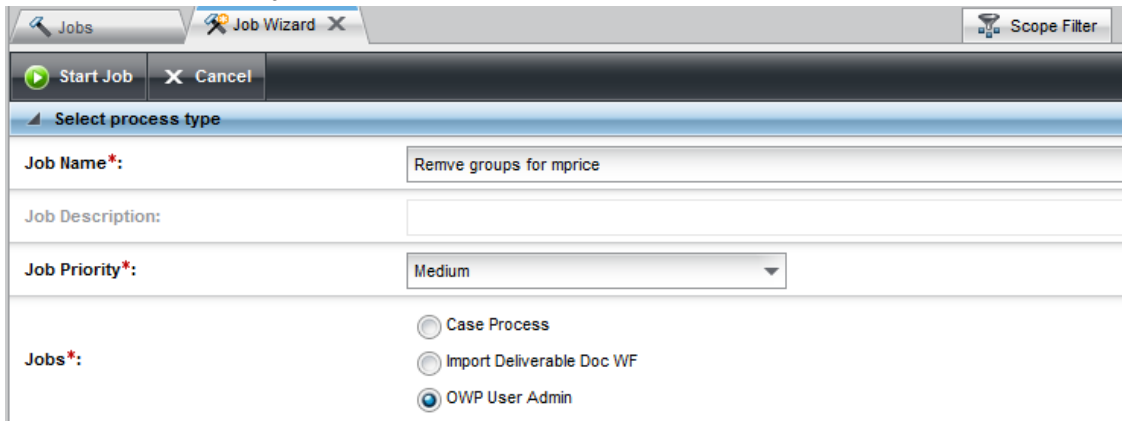
- d. VERIFY!! In this case, the User was assigned to a higher permission level (Administrator), and the log-in reflects this now.



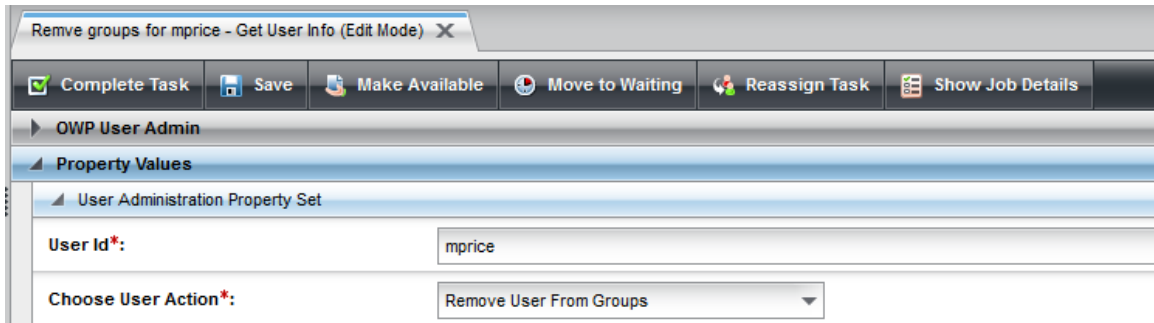
User logged in after group changes.
Logged in with most privileged group.

3. Removing an existing RMS User from some groups

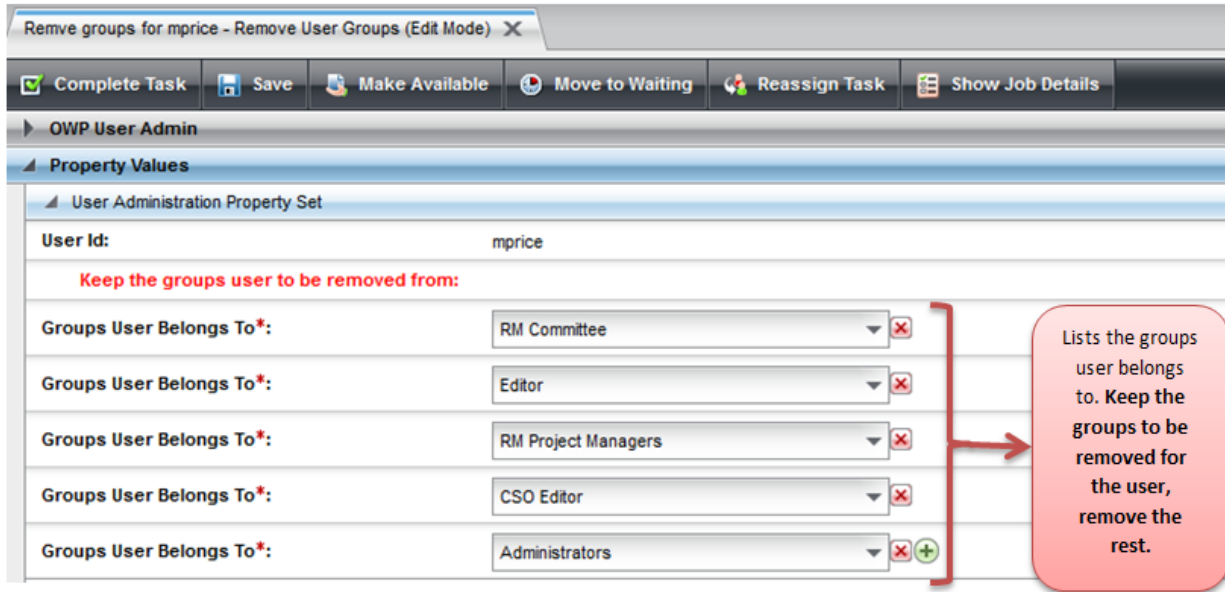
- a. Start a new job.



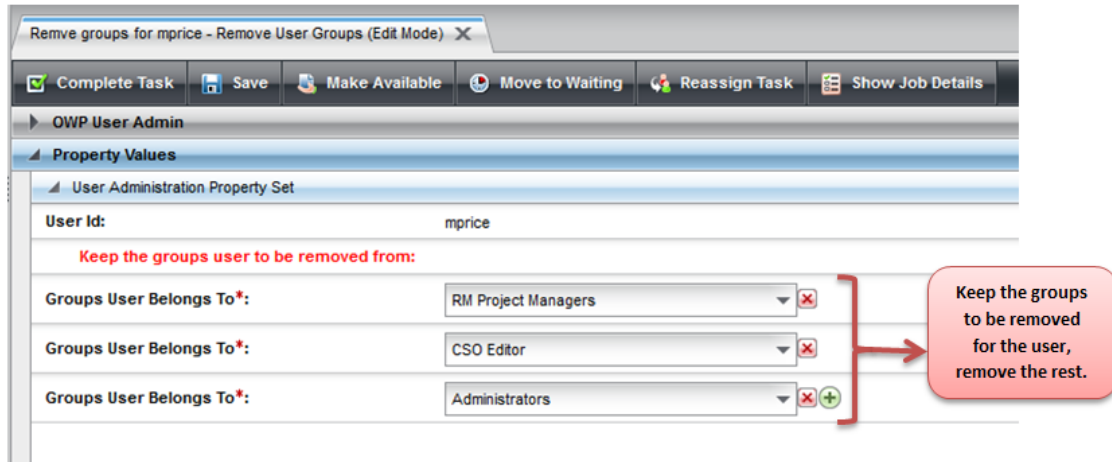
- b. Select the User ID and Action



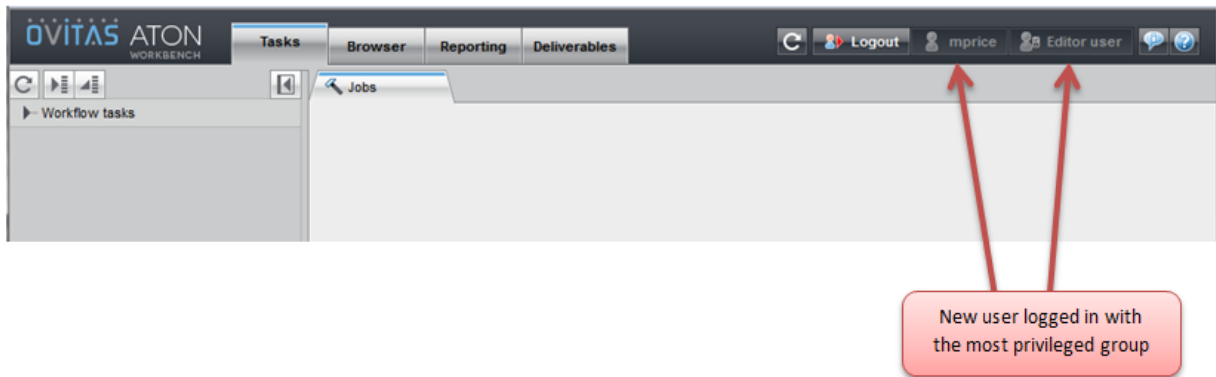
c. Window to remove user from groups, it lists all the groups the user currently belongs to



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.

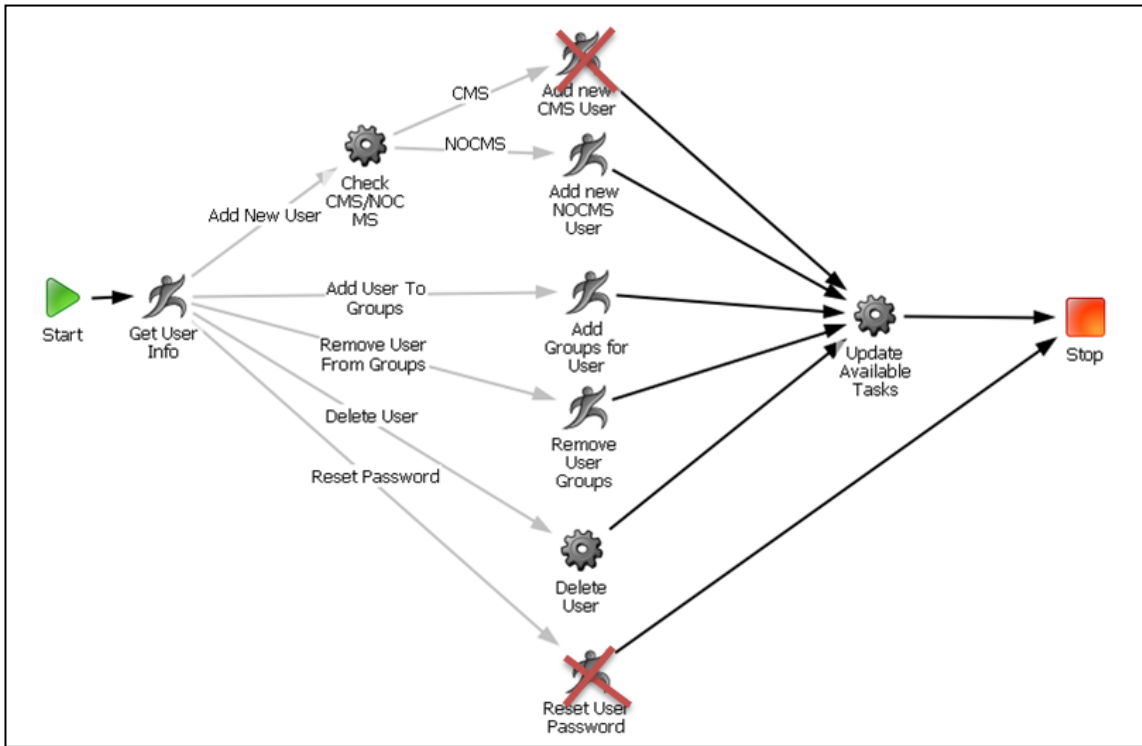
The screenshot shows a web application window titled "Delete mprice from Aton - Get User Info". At the top, there is a toolbar with several icons and labels: "Complete Task", "Save", "Make Available", "Move to Waiting", "Reassign Task", and "Show Job Details". Below the toolbar, the interface is organized into sections. The "OWP User Admin" section is expanded to show "Property Values". Under "Property Values", the "User Administration Property Set" is visible. This section contains two input fields: "User Id*" with the text "mprice" entered, and "Choose User Action*" with a dropdown menu currently showing "Delete User".

- 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