Retek® Security Manager™ 11.0

User Guide

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Customer Support

Customer Support hours

Customer Support is available 7x24x365 via email, phone, and Web access.

Depending on the Support option chosen by a particular client (Standard, Plus, or Premium), the times that certain services are delivered may be restricted. Severity 1 (Critical) issues are addressed on a 7x24 basis and receive continuous attention until resolved, for all clients on active maintenance. Retek customers on active maintenance agreements may contact a global Customer Support representative in accordance with contract terms in one of the following ways.

Contact Method	Contact Information
E-mail	support@retek.com
Internet (ROCS)	rocs.retek.com Retek's secure client Web site to update and view issues
Phone	+1 612 587 5800

Toll free alternatives are also available in various regions of the world:

Australia	+1 800 555 923 (AU-Telstra) or +1 800 000 562 (AU-Optus)
France	0800 90 91 66
Hong Kong	800 96 4262
Korea	00 308 13 1342
United Kingdom	0800 917 2863
United States	+1 800 61 RETEK or 800 617 3835

Mail	Retek Customer Support Retek on the Mall 950 Nicollet Mall Minneapolis, MN 55403

When contacting Customer Support, please provide:

- Product version and program/module name.
- Functional and technical description of the problem (include business impact).
- Detailed step-by-step instructions to recreate.
- Exact error message received.
- Screen shots of each step you take.

Contents

Chapter 1 – Welcome to Retek Security Manager

Overview

Retek Security Manager allows you a single point of security management for the applications that you use. Users with like functions are grouped together into roles. The roles are then assigned the types of permissions for each workflow within an application.

Business process

Business process
Create roles
Define workflows for a role
Assign users to a role

Chapter 2 – Using RSM

Overview

This section describes how to navigate within RSM. The following topics are included:

- Instructions to access the System Administration menu
- Instructions to navigate within a window
- Instructions to sort columns and select information
- Instructions to edit the table layout

Procedures

Note: RSM is accessed through Retek Navigator. Contact your system administrator to install Retek Navigator.

Log in to Retek Security Manager

1. In the User ID field, enter the user information assigned to you.
2. In the Password field, enter the password assigned to you.
3. Click **Login**. The Retek Navigator is displayed.
4. From the Navigator menu, select Retek Security manager. The application is displayed in a new window.

Access the System Administration menu

Before you can access the System Administration menu, you must access the System Administration menu.

- From the list of tasks, click System Administration.

Navigate within a window

Use a drop-down list

Some fields can accept values only from a predefined list of options. Such fields have a down arrow button on the right side of the field.

1. Click the down arrow button. A drop-down list of options displays.
2. Select a value from the drop-down list. The selected option is entered in the appropriate field.

Sort and select information

RSM allows you to sort data so that you can view the appropriate information.

Sort information

Many windows use underlined column headings to sort table data.

- To sort the list, click any underlined heading. A sort indicator indicates the column that is currently sorted, as well as the sort order.

Note: You can sort two columns at a time. The number in the sort indicator tells you which column is sorted first and which column is sorted second.

- To reverse the current sort order, click the same column heading again.

Select information

Multi-select functionality allows you to select multiple rows in a table by using the Shift and Control keys. This is so users can perform a single action on multiple rows. The functionality is analogous to the select functionality of other Windows applications.

Select continuous information

1. Click on a row.
2. Press Shift and click on another row to select all the rows in between, inclusively.

Select non-continuous information

1. Click on a row.
2. Control click on rows to select or deselect the individual rows clicked on (depending on whether they are currently selected) while leaving the other selected rows still selected.

Customize the tables

1. Click on the edit button. The Table Configuration window is displayed.
2. In the Content Font Size area, select the font size you would like to view the content at.
3. In the Gridlines Setting area, select the gridlines you would like to see.
4. Click **OK** to save any changes and close the window.

Chapter 3 – Create roles

Overview

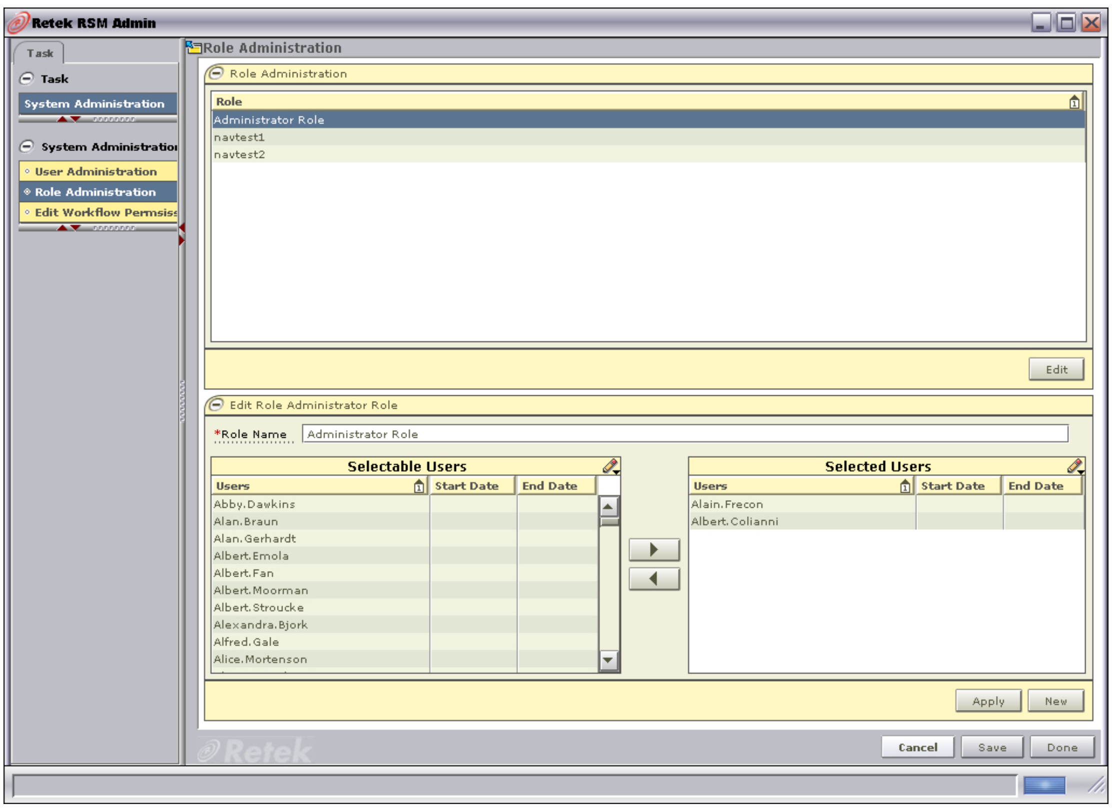
A role is a way of grouping workflows and actions for the functionality in each application supported by RSM. When you create a role, you assign a name to a role. Each role can be used to give to different levels of permissions to like users. After you create the role, you can assign users to a role and define the workflows for a role.

Procedures

Create a role

⇒ **Navigate:** Access the System Administration menu

From the System Administration menu, select Role Administration. The Role Administration window is displayed.



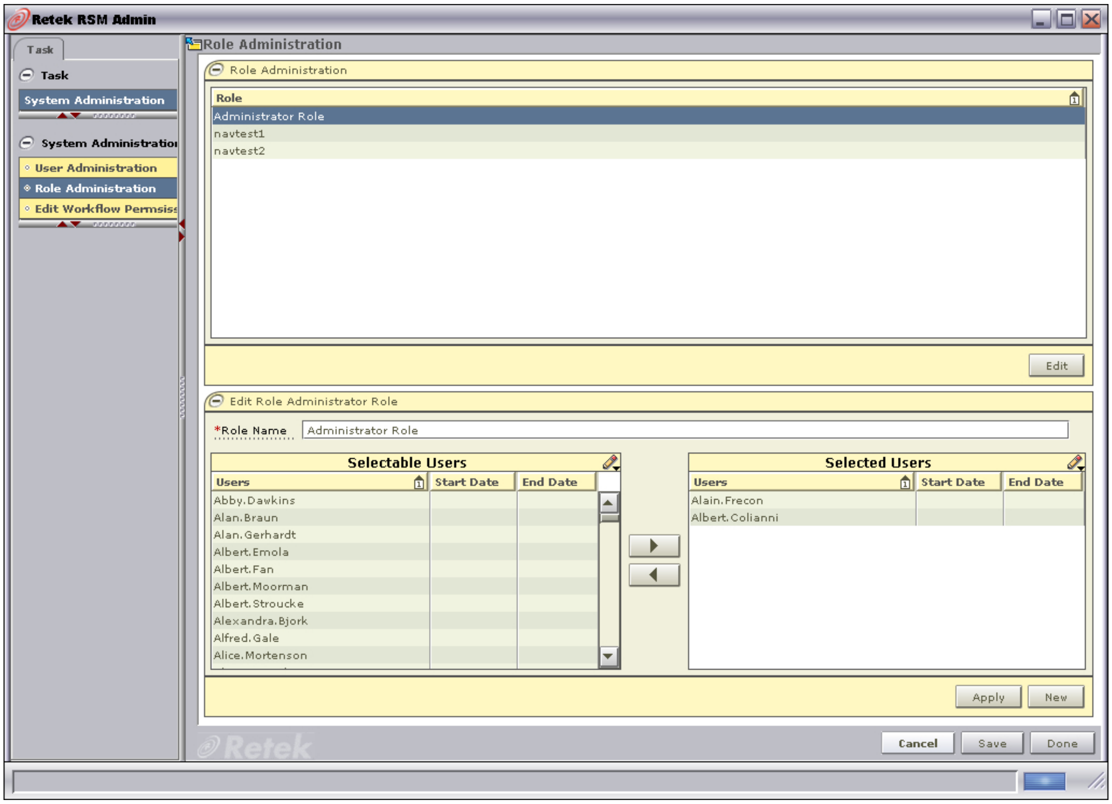
Role Administration window

1. In the Edit Role area, click **New**. The Create Role area is displayed and the Role Name field is enabled.
2. In the Role Name field, enter the name of the new role you are creating.
3. Click **Apply**. The new role is added to the list of roles.

Edit a role

⇒ **Navigate:** Access the System Administration menu

From the System Administration menu, select Role Administration. The Role Administration window is displayed.



Role Administration window

1. In the Role area, select a role and click **Edit**.

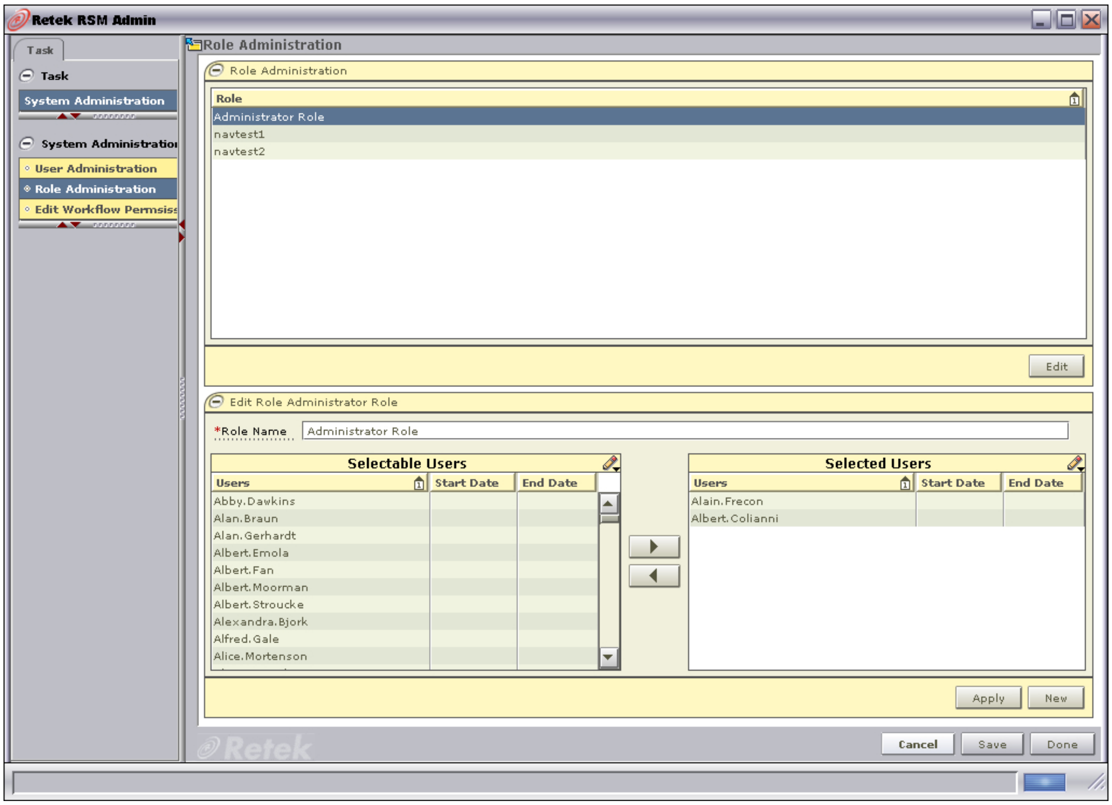
   OR

   In the Role area, double click on the role you want to edit.
2. In the Role Name field, edit the name of the role as necessary.
3. Add users to the role as appropriate.
4. Click **Apply**. The new role is added to the list of roles.

Add users to a role

⇒ **Navigate:** Access the System Administration menu

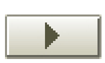
From the System Administration menu, select Role Administration. The Role Administration window is displayed.



Role Administration window

1. In the Role area, select a role and click **Edit**.

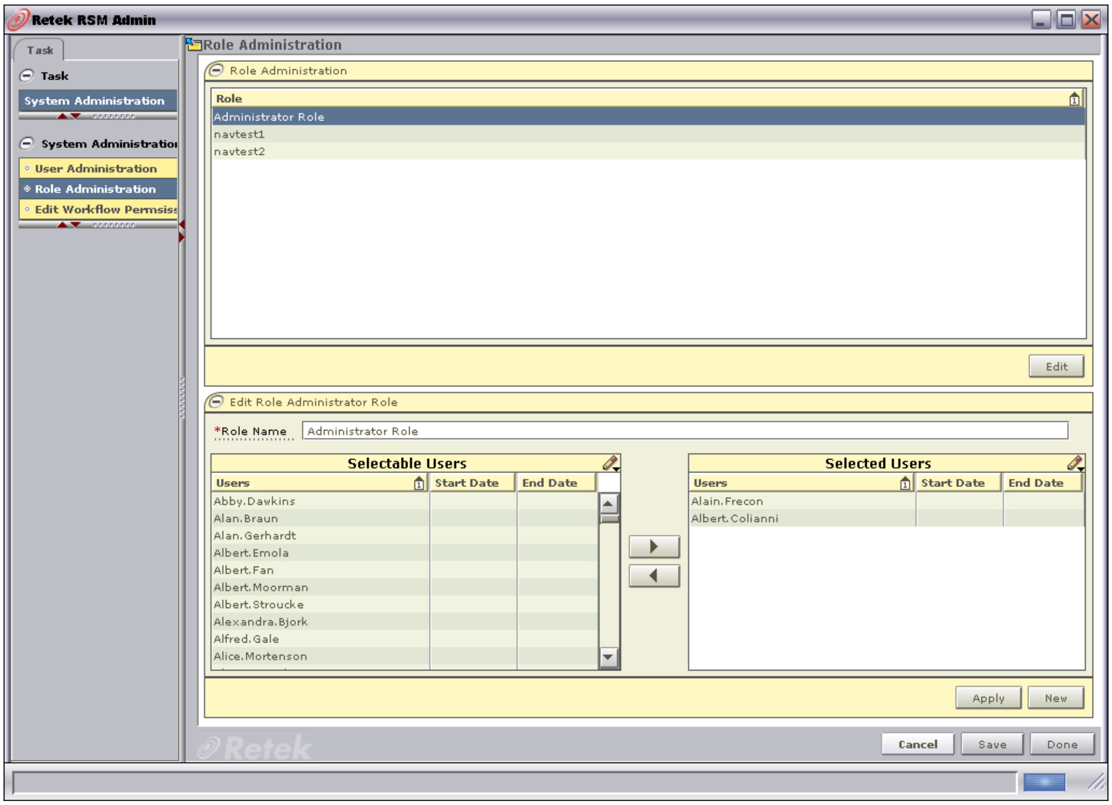
   OR

   In the Role area, double click on the role you want to edit.
2. In the Selectable Users area, select the users you want to assign to the role.
3. Click the right arrow  button. The users are displayed in the Selected Users area.
4. Click **Apply** to save any changes.

Remove users from a role

⇒ **Navigate:** Access the System Administration menu

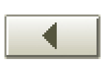
From the System Administration menu, select Role Administration. The Role Administration window is displayed.



Role Administration window

1. In the Role area, select a role and click **Edit**.

   OR

   In the Role area, double click on the role you want to edit.
2. In the Selected Users area, select the users you want to assign to the role.
3. Click the left arrow  button. The users are displayed in the Selected Users area.
4. Click **Apply** to save any changes.

Chapter 4 – Add workflow permissions to a role

Overview

A workflow is a secured task or group of tasks that exist in an application. An action is the type of ability that users associated with a role have access to in an application's work flow. Once the role, workflow, and action are associated, users assigned to the role can complete their work.

Each application that is associated with RSM provides a list of workflows and actions that user assigned to the appropriate role can access through RSM.

There are six types of actions that may be assigned to a role and workflow:

- **Access:** Users associated with the role have access to the application, but are not allowed see any secured information within a workflow. Users must have access to an application in order to have any of the other permission types.

Note: This action is the lowest level of permission a user associated with a role can have. You must assign Access to a role before any of the other permissions are available.

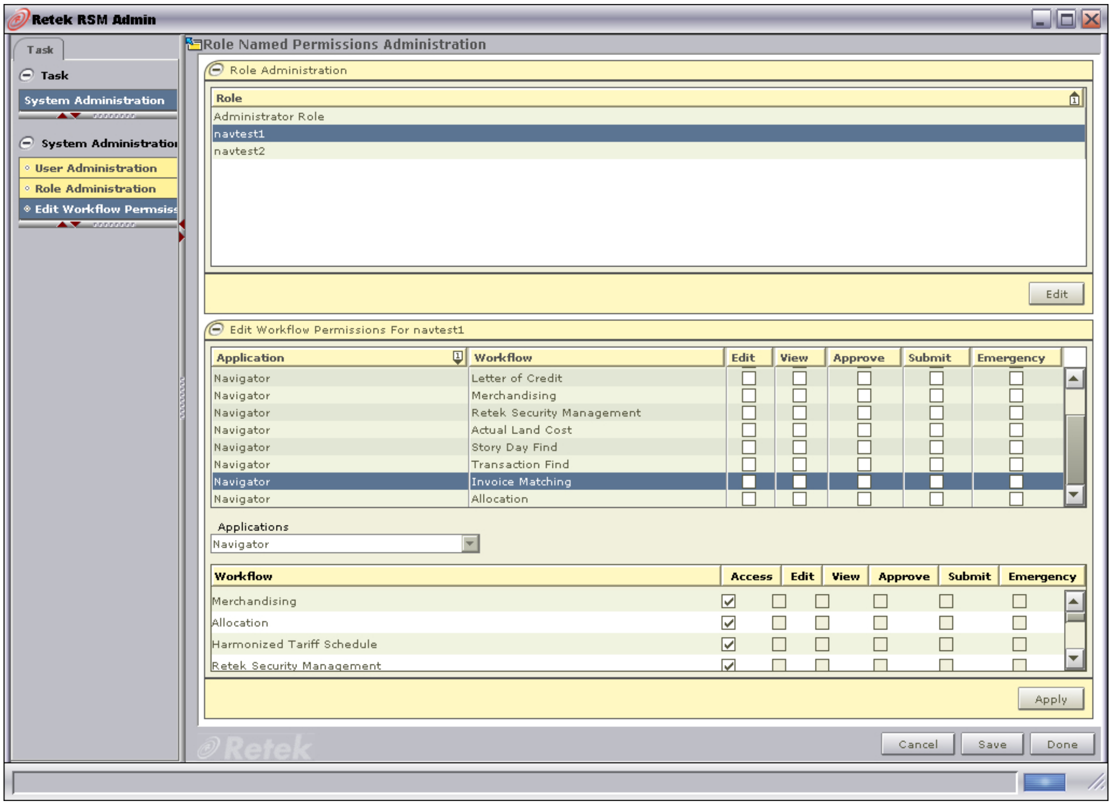
- **Edit:** Users associated with the role are allowed to create, update, and save any changes to a workflow.
- **View:** Users associated with the role are allowed to see to all secured information in a workflow, but not make any changes to the data in the workflow.
- **Approve:** Users associated with the role are allowed to change the status of a workflow to Approved.
- **Submit:** Users associated with the role are allowed to change the status of a workflow from Worksheet to Submitted.
- **Emergency:** Users associated with the role are granted special access that goes beyond normal day-to-day access to functionality. This allows users to bypass normal delays in processing.

Procedures

Add a workflow and associated action to a role

⇒ **Navigate:** Access the System Administration menu

From the System Administration menu, select Edit Workflow Permission. The Role Named Permissions Administration window is displayed.



Role Named Permissions Administration window

1. In the Role area, select a role and click **Edit**.

   OR

   In the Role area, double click on the role you want to edit.
2. In the Edit Workflow Permission area, in the Applications field, select the application that has the workflows you want to add to the role. Workflows for the application are displayed below.
3. Select the check boxes for each type of action you want to assign to the role.

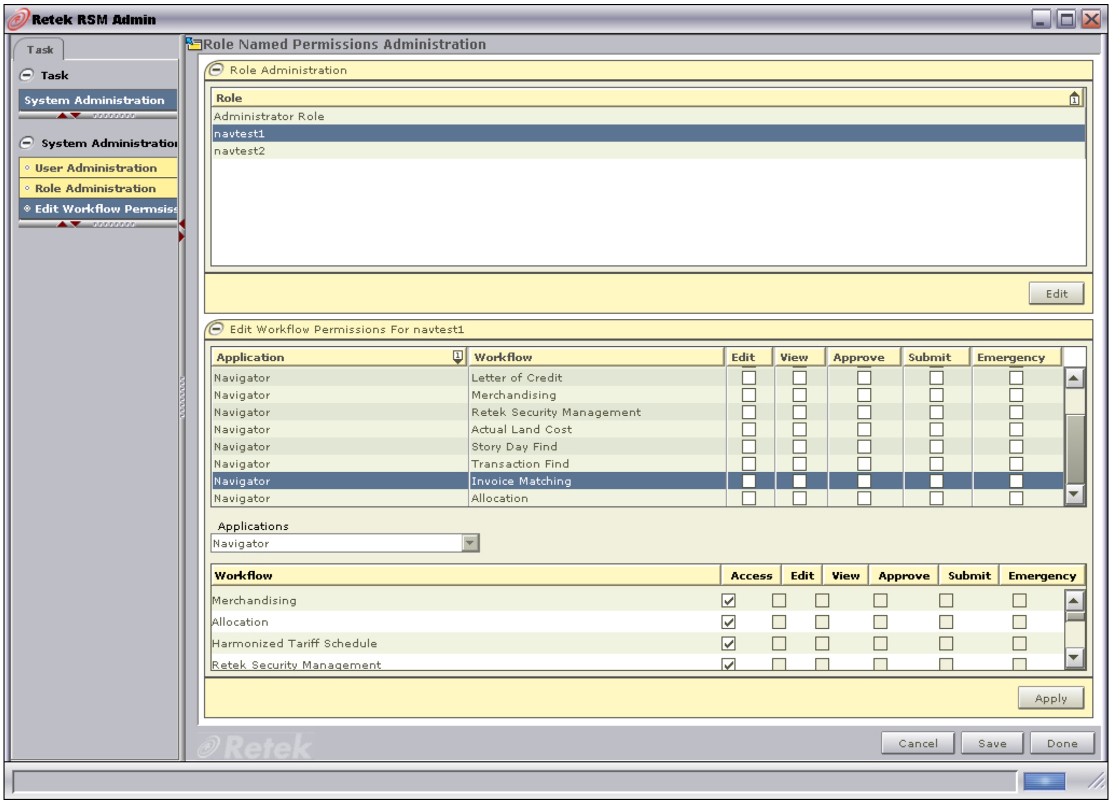
Note: You must assign the Access action for the other assigned actions to be available to users in the role.

4. Click **Apply**. Your changes are saved and displayed in the view area.

Delete a workflow and associated action from a role

⇒ **Navigate:** Access the System Administration menu

From the System Administration menu, select Edit Workflow Permission. The Role Named Permissions Administration window is displayed.



Role Named Permissions Administration window

1. In the Role area, select a role and click **Edit**.

   OR

   In the Role area, double click on the role you want to edit.

2. In the Edit Workflow Permission area, in the Applications field, select the application that has the workflows you want to delete from the role. Workflows for the application are displayed below.
3. Deselect the check boxes for each type of action you want to remove from the role.
4. Click **Apply**. Your changes are saved and displayed in the view area.

Chapter 5 – Assign users to a role

Overview

Users are not created in RSM. Rather, RSM looks up users that exist in a Light Directory Access Protocol (LDAP) compliant directory service. From the LDAP, RSM retrieves the user information. You can then assign roles to a user.

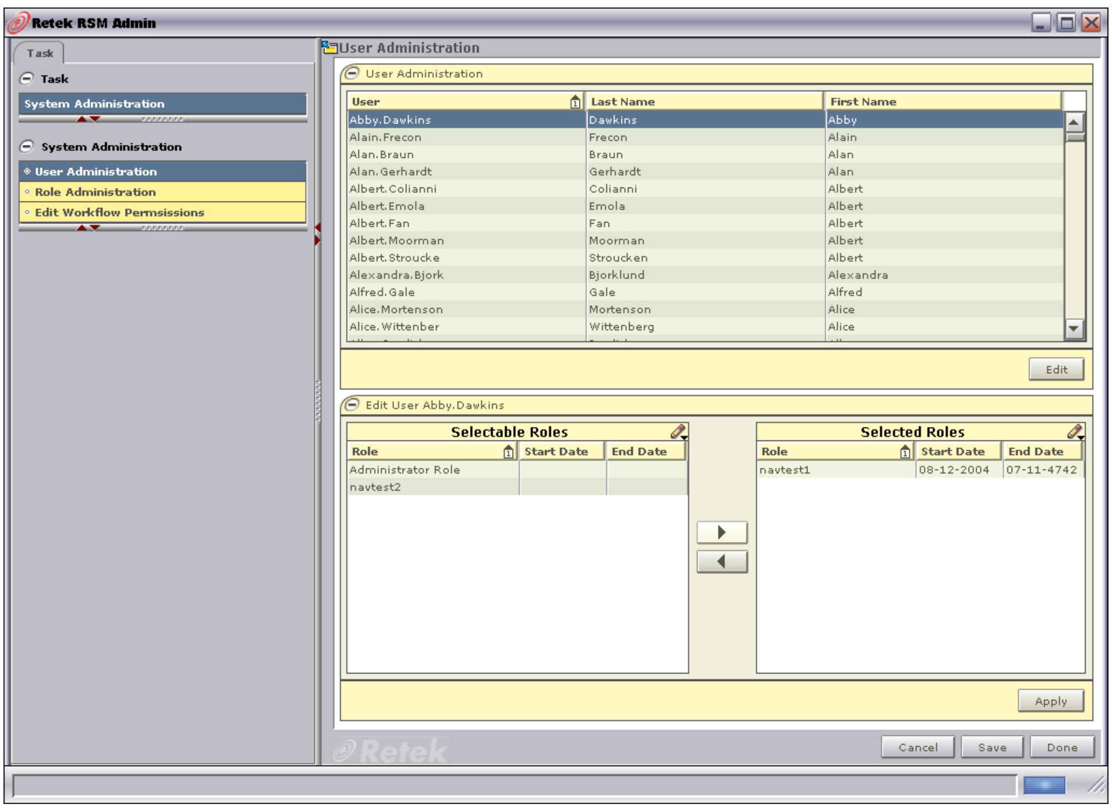
Note: For additional information on RSM and LDAP compliant directories, please see the RSM Operations Guide.

Procedures

Add roles to a user

⇒ **Navigate:** Access the System Administration menu

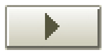
From the System Administration menu, select User Administration. The User Administration window is displayed.



User Administration window

1. In the User Administration area, select a role and click **Edit**.

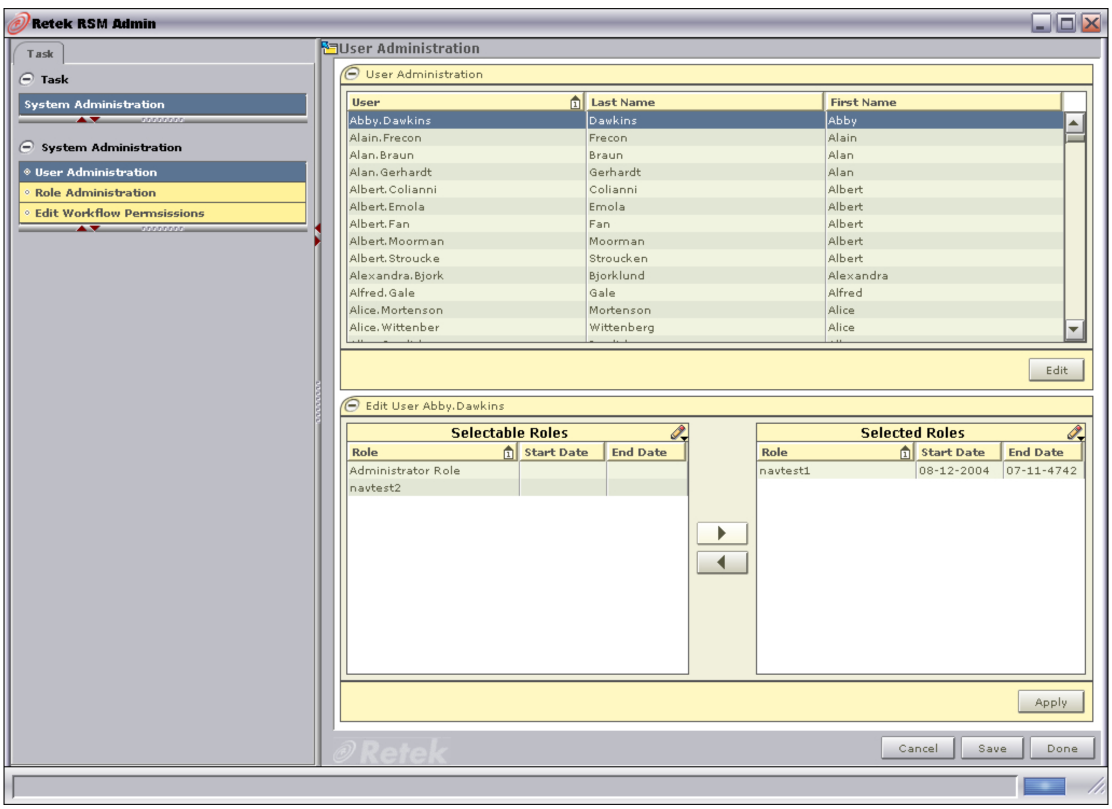
   OR

   In the User Administration area, double click on the role you want to edit.
2. In the Selectable Roles area, select the users you want to assign to the role.
3. Click the right arrow  button. The users are displayed in the Selected Roles area.
4. Click **Apply** to save any changes.

Remove roles from a user

⇒ **Navigate:** Access the System Administration menu

From the System Administration menu, select User Administration. The User Administration window is displayed.



User Administration window

1. In the User Administration area, select a role and click **Edit**.

   OR

   In the User Administration area, double click on the role you want to edit.
2. In the Selected Roles area, select the users you want to assign to the role.
3. Click the left arrow  button. The users are displayed in the Selected Roles area.
4. Click **Apply** to save any changes.

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