

Retek[®] Security Manager[™] 11.0.1

User Guide

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- 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.

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Welcome to Retek Security Manager

Overview

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

Business process

Business process
Maintain roles
Add workflow permissions to a role
Add data permissions to a role
Assign users to a role
Maintain Password map

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

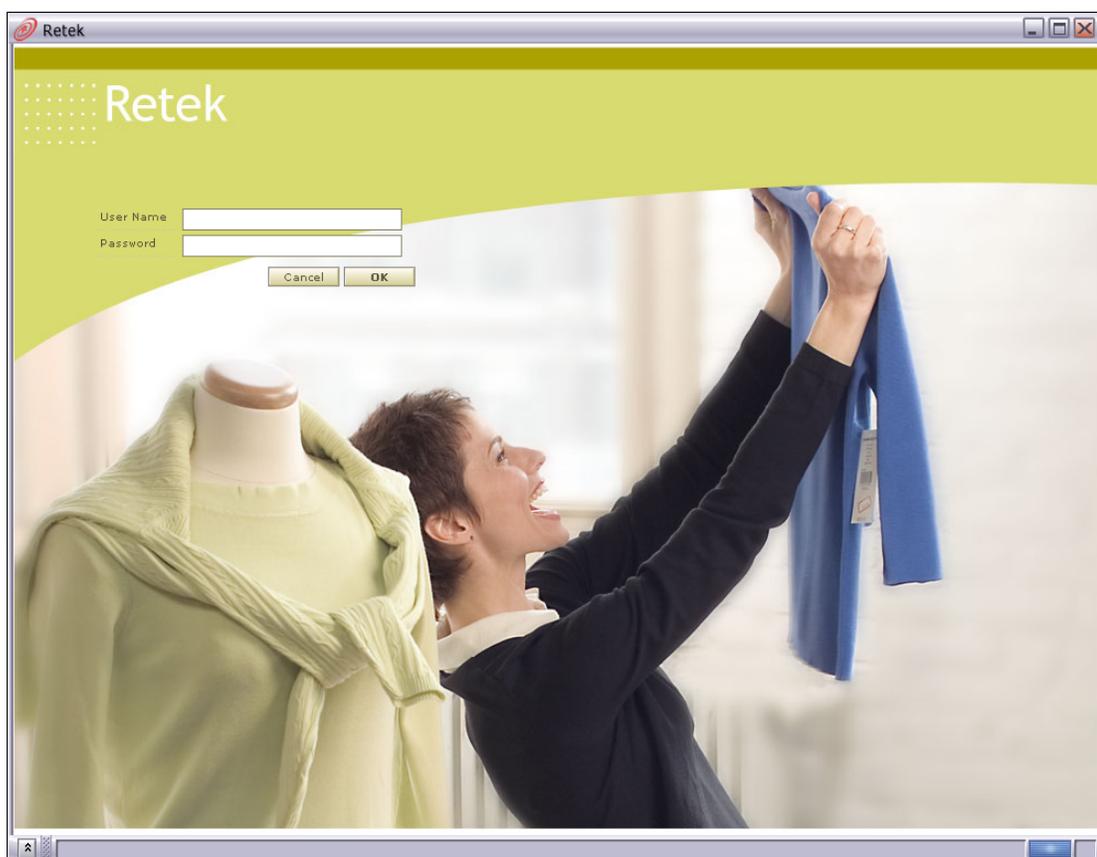
Procedures



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

Log in to Retek Security Manager

⇒ **Navigate:** Open Retek Navigator. The Retek Navigator Login window is displayed.



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 **OK**. Retek Navigator is displayed.
4. From the Navigator menu, select Retek Security manager. The Retek Security Manager Main Window is displayed in a new window.

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.

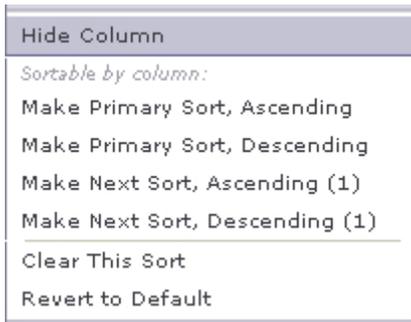
1. Click the down arrow  button. A drop-down list of options displays.
2. Select a value from the drop-down list. The selected option is entered in the appropriate field.

Sort and select information

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

Sort information

1. To sort the list, right click any heading and select from the drop-down menu.



2. 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.

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.

User Administration

Assign users to a role

Overview

Users are not created in RSM. Rather, RSM looks up users that exist in a Lightweight Directory Access Protocol (LDAP) compliant directory service. From the LDAP compliant directory, 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



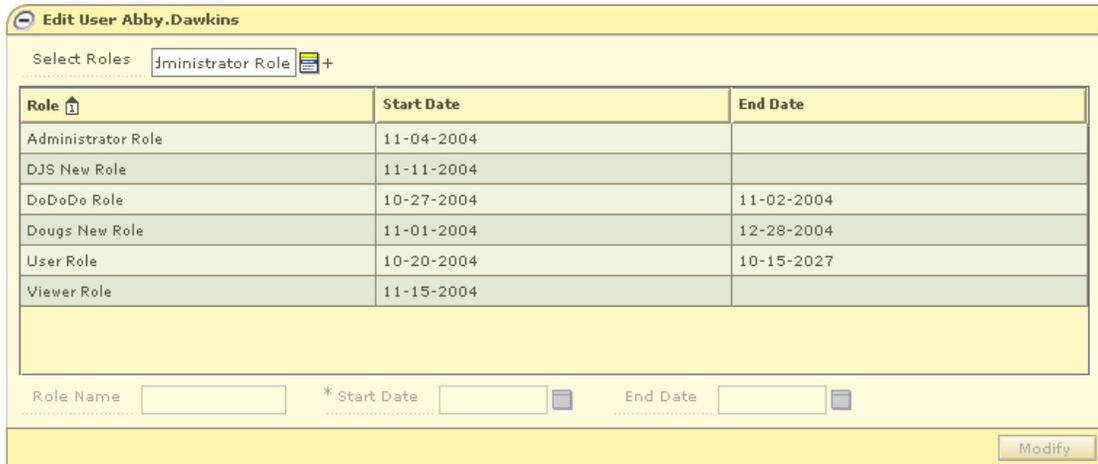
Note: Permissions are assigned to roles, then users are assigned to roles. Permissions are not assigned directly to users.

⇒ **Navigate:** From the Task Pad, select User Administration > User Administration. The User Administration workspace is displayed.

User	Last Name	First Name
Abby.Dawkins	Dawkins	Abby
Alain.Frecon	Frecon	Alain
Alan.Braun	Braun	Alan
Alan.Gerhardt	Gerhardt	Alan
Albert.Colianni	Colianni	Albert
Albert.Emola	Emola	Albert
Albert.Fan	Fan	Albert
Albert.Moorman	Moorman	Albert

Role	Start Date	End Date

1. In the User Administration pane, select a role.
2. Click **Edit** or double click on the role you want to edit. The Edit User pane is displayed.



The screenshot shows the 'Edit User Abby.Dawkins' window. At the top, there is a 'Select Roles' field containing 'Administrator Role' and a '+' button. Below this is a table with three columns: 'Role', 'Start Date', and 'End Date'. The table contains the following data:

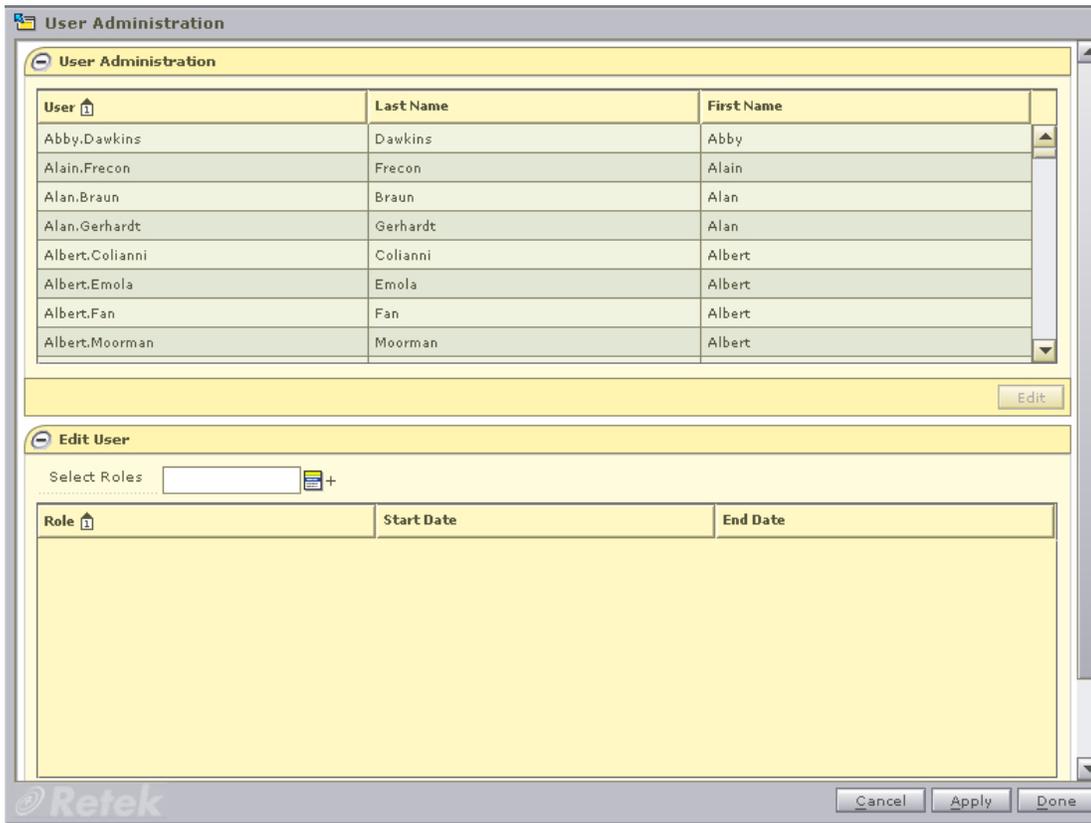
Role	Start Date	End Date
Administrator Role	11-04-2004	
DJS New Role	11-11-2004	
DoDoDo Role	10-27-2004	11-02-2004
Dougs New Role	11-01-2004	12-28-2004
User Role	10-20-2004	10-15-2027
Viewer Role	11-15-2004	

Below the table, there are three input fields: 'Role Name', '* Start Date', and 'End Date'. A 'Modify' button is located at the bottom right of the window.

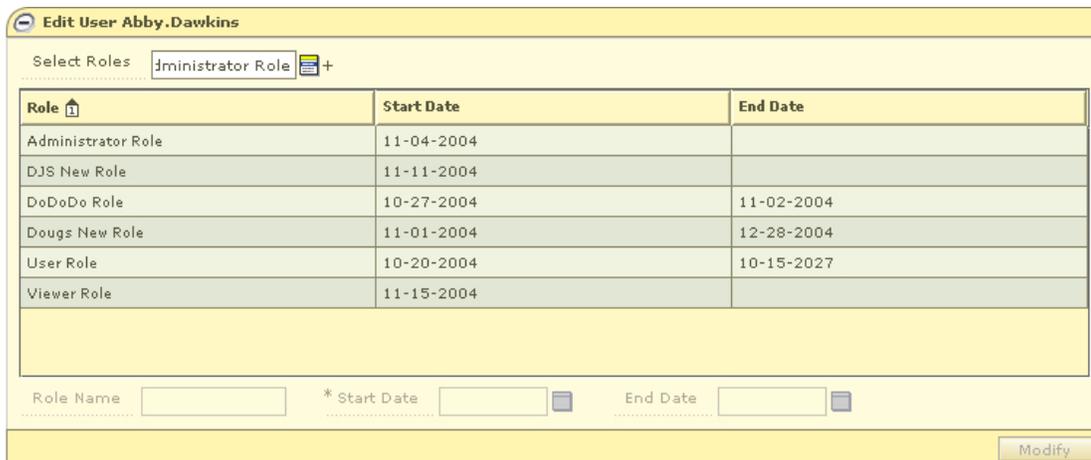
3. Click the LOV  button next to the Select Roles field.
 - a. Select a role from the left column.
 - b. Click the right arrow  button. The role is displayed in the right, or selected, column.
 - c. Repeat steps a and b until all the roles assigned to the user are selected.
 - d. Click **Select**. The roles are assigned to the user.
4. Click **Apply** to save any changes.

Remove roles from a user

⇒ **Navigate:** From the Task Pad, select User Administration > User Administration. The User Administration workspace is displayed.



1. In the User Administration window, select a role.
2. Click **Edit** or double click on the role you want to edit. The Edit User pane is displayed.



3. Click the LOV  button next to the Select Roles field.
4. Select a role to remove from the right, or selected, column.
5. Click the left arrow  button. The role is displayed in the left, or available, column.
6. Click **Select**. The user is removed from the role.
7. Click **Apply**. The changes to the user are saved.
Or
Click **Done**. The changes to the user are saved and the workspace is closed.

Role Administration

Maintain roles

Overview

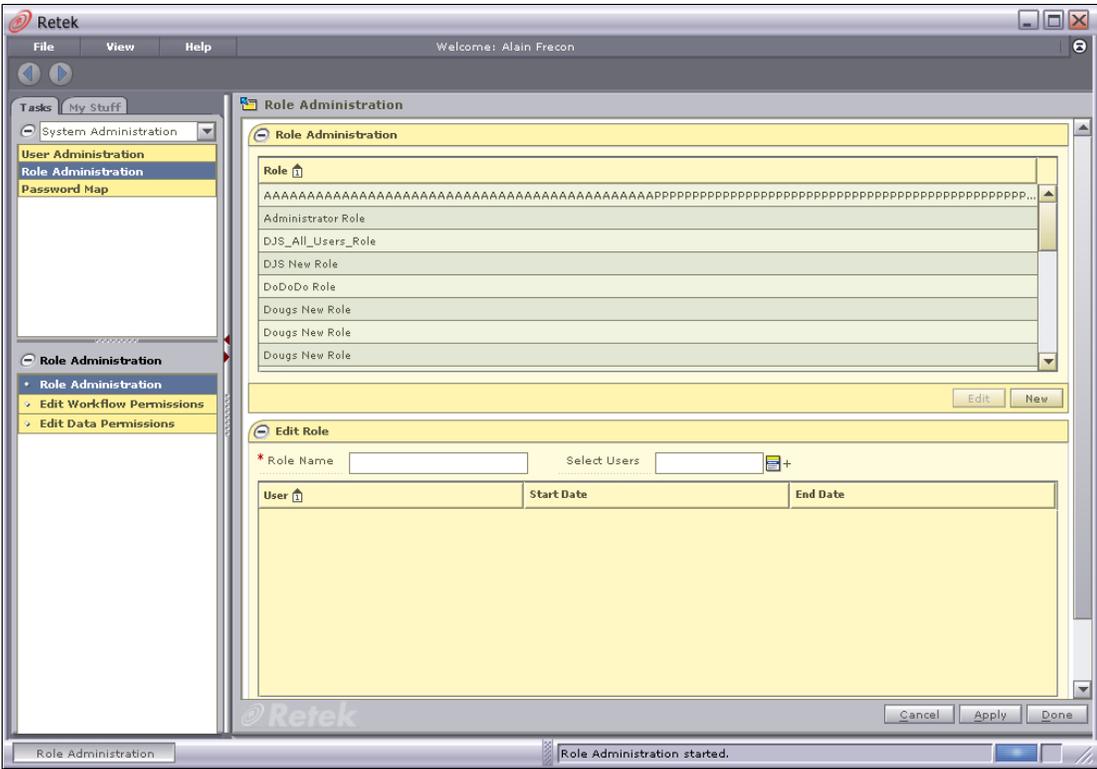
A role is a way of grouping workflows and actions for the functionality in each application supported by RSM. When you create a role, you assign a name to a role. Each role can be used to give different levels of permissions to like users. After you create the role, you can define the workflows for a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

 **Note:** Permissions are assigned to roles, then users are assigned to roles. Permissions are not assigned directly to users.

Procedures

Create a role

⇒ **Navigate:** From the Task Pad, select Role Administration > Role Administration. The Role Administration workspace is displayed.



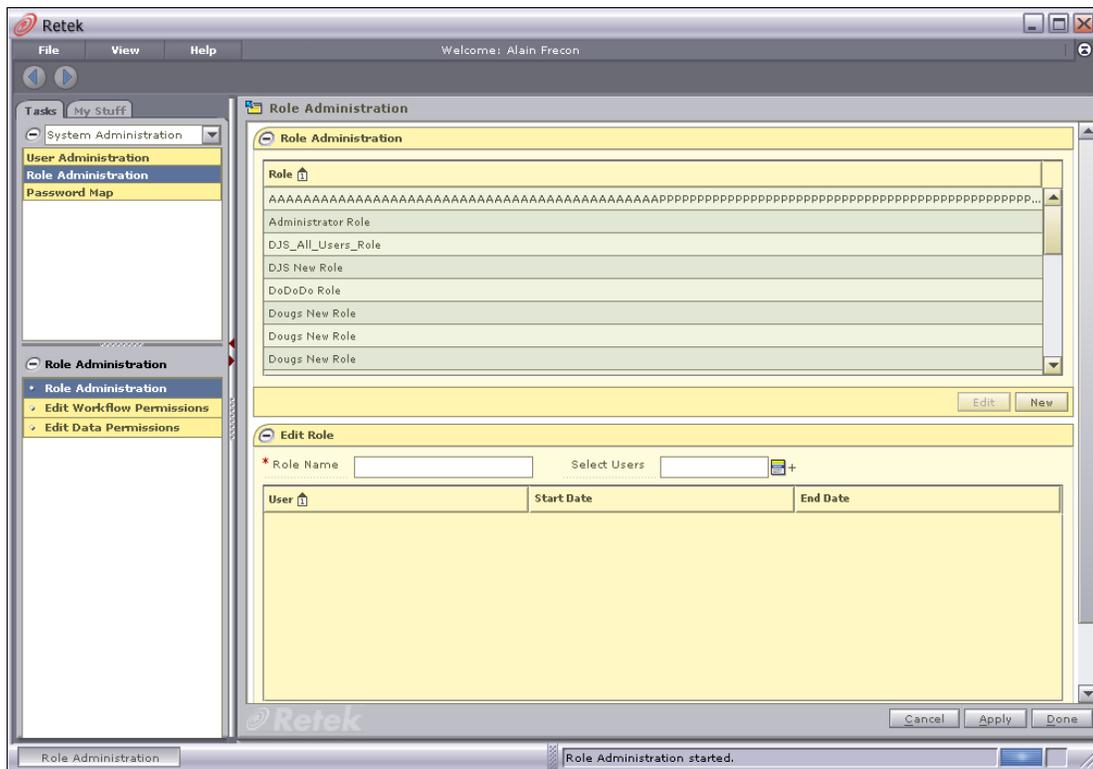
1. In the Role Administration workspace, click **New**. The Create Role pane is displayed and the Role Name field is enabled.

User	Start Date	End Date
Abby.Dawkins	11-30-2004	
Alain.Frecon	11-30-2004	
Alan.Braun	11-30-2004	

2. In the Role Name field, enter the name of the new role you are creating.
3. Click the LOV  button next to the Select Users field.
 - a. Select a user from the left column.
 - b. Click the right arrow  button. The user is displayed in the right, or selected, column.
 - c. Repeat steps a and b until all the users assigned to the role are selected.
 - d. Click **Select**. The user names appear in the table.
4. Modify the end date of a user.
 - a. Select a user name from the table.
 - b. Enter a different start date in the Start Date field, or click the LOV  button and select a date if it should be later than today.
 - c. Enter an end date in the End Date field, or click the LOV  button and select a date. This field may be left blank.
5. Click **Modify**. The role is added to the list of roles.
6. Click **Apply**. The new role is saved.

Edit a role

⇒ **Navigate:** From the Task Pad, select Role Administration > Role Administration. The Role Administration workspace is displayed.



1. In the Role Administration pane, select a role.
2. Click **Edit** or double click on the role you want to edit.
3. In the Role Name field, edit the name of the role as necessary.

Add users to a role

1. Click the LOV  button next to the Select Users field.
2. Select a user to add from the left, or available, column.
3. Click the right arrow  button. The user is displayed in the right, or selected, column.
4. Click **Select**. The users are added to the role.

Remove users from a role

1. Click the LOV  button next to the Select Users field.
2. Select a user to remove from the right, or selected, column.
3. Click the left arrow  button. The user is displayed in the left, or available, column.
4. Click **Select**. The users are removed from the role.

Save changes to a role

- Click **Apply**. The changes to the role are saved.

Or

- Click **Done**. The changes to the role are saved and the workspace is closed.

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 associated with RSM provides a list of workflows and actions that a 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.

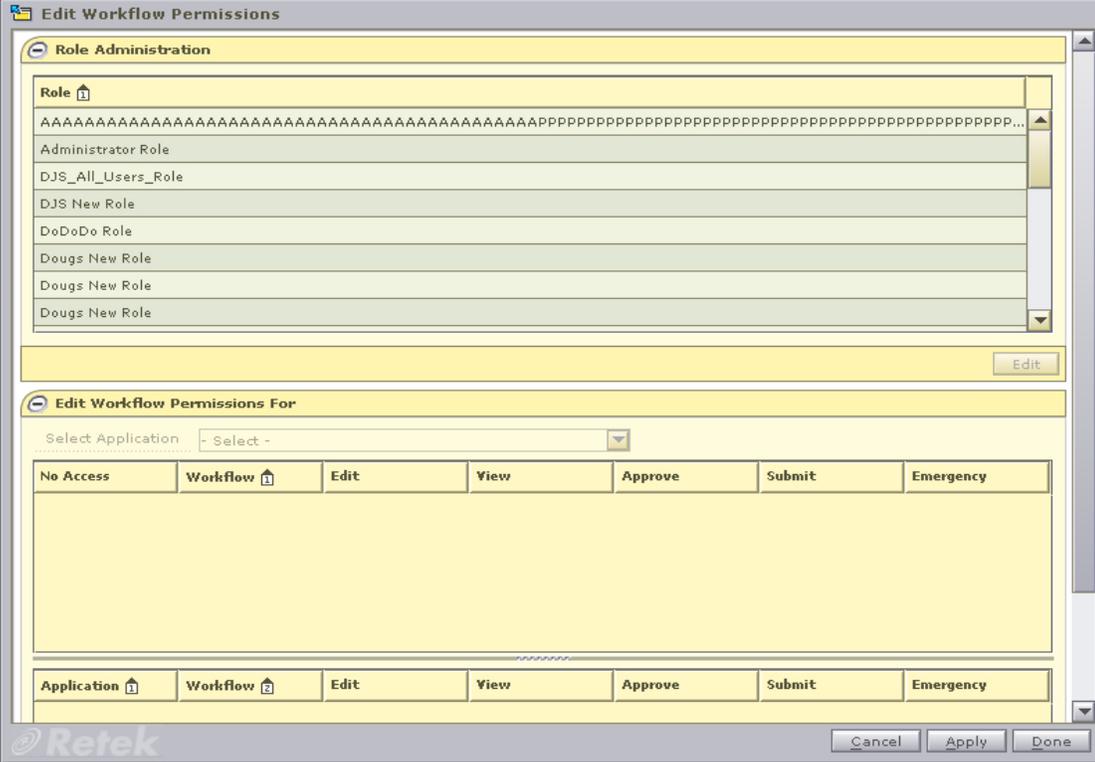


Note: Permissions are assigned to roles, then users are assigned to roles. Permissions are not assigned directly to users.

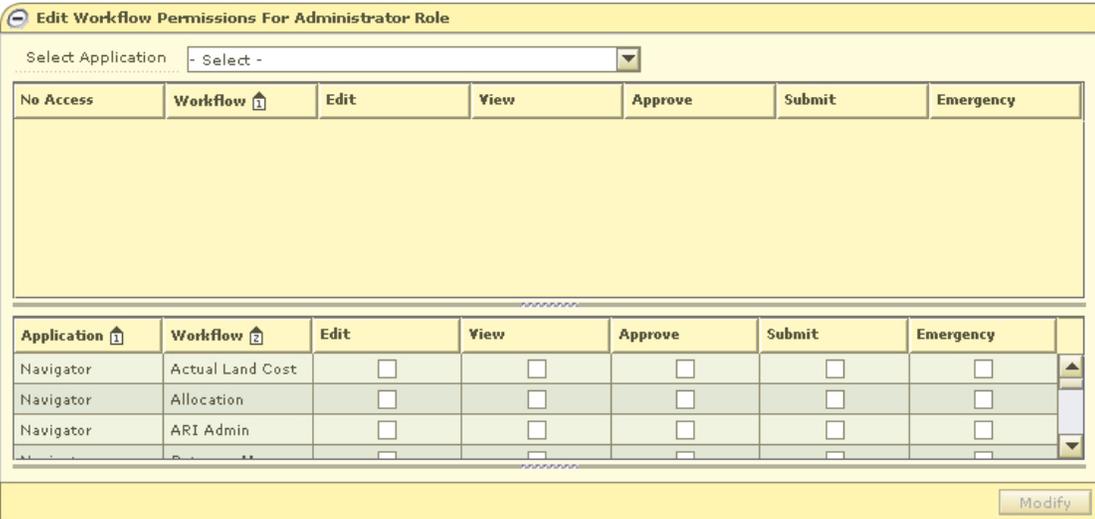
Procedures

Add a workflow and associated action to a role

⇒ **Navigate:** From the Task Pad, select Role Administration > Edit Workflow Permission. The Edit Workflow Permissions workspace is displayed.



- 1. In the Role area, select a role.
- 2. Click **Edit** or double click on the role you want to edit. Information is displayed on the Edit Workflow Permission pane.



- 3. Select the application with the workflows you want to add to the role from the Select Workflows drop-down. Workflows for the application are displayed below.

4. 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.

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

Delete a workflow and associated action from a role

- ⇒ **Navigate:** From the Task Pad, select Role Administration > Edit Workflow Permission. The Edit Workflow Permissions workspace is displayed.

The screenshot shows the 'Edit Workflow Permissions' dialog box. It is divided into two main sections. The top section, titled 'Role Administration', contains a list of roles: Administrator Role, DJS_All_Users_Role, DJS New Role, DoDoDo Role, Dougs New Role, Dougs New Role, and Dougs New Role. An 'Edit' button is located to the right of this list. The bottom section, titled 'Edit Workflow Permissions For', features a 'Select Application' dropdown menu currently set to 'Select -'. Below this is a table with columns for 'No Access', 'Workflow', 'Edit', 'View', 'Approve', 'Submit', and 'Emergency'. The 'Workflow' column is currently empty. At the bottom of the dialog, there are 'Cancel', 'Apply', and 'Done' buttons. The Retek logo is visible in the bottom left corner.

1. In the Role area, select a role.
2. Click **Edit** or double click on the role you want to edit.
3. Select the application with the workflows you want to add to the role from the Select Workflows drop-down. Workflows for the application are displayed below.
4. Deselect the check boxes for each type of action you want to remove from the role.
5. Click **Apply**. Your changes are saved and displayed in the view area.

Add data permissions to a role

Overview

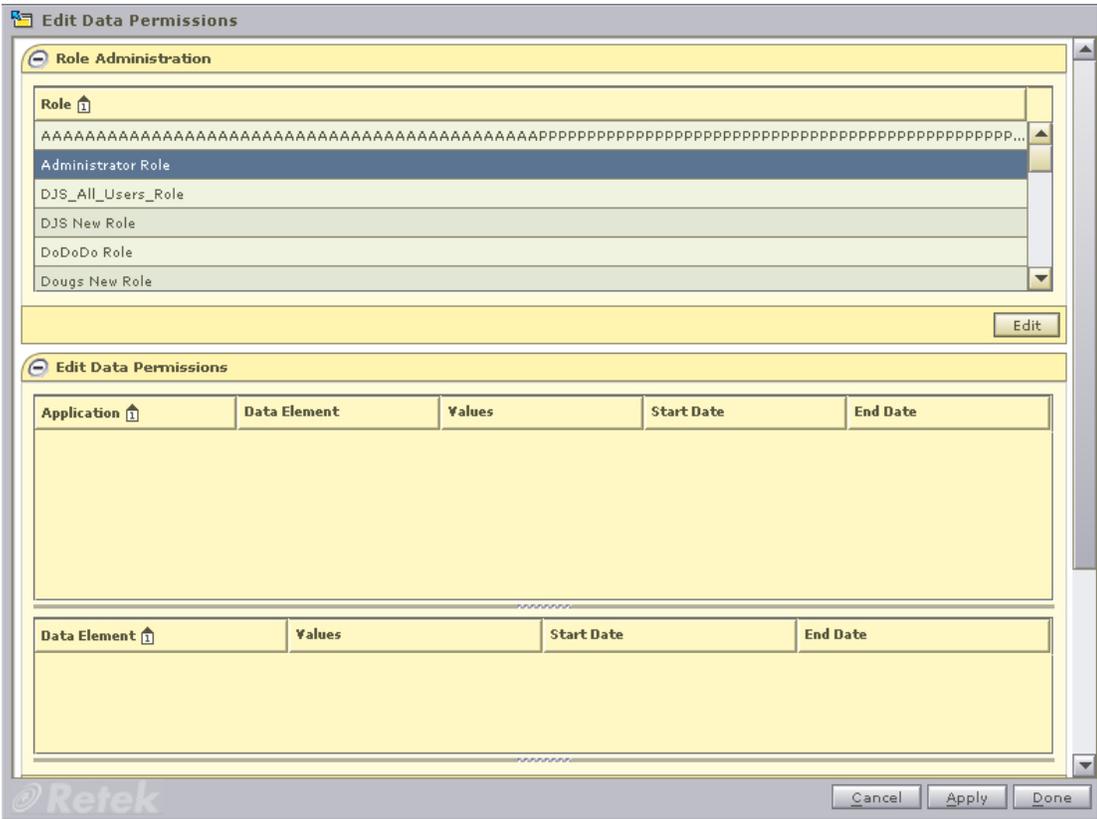
Use the Edit Data Permissions workflow to add data level permissions to user roles. You may also set end dates for the permissions.

 **Note:** Permissions are assigned to roles, then users are assigned to roles. Permissions are not assigned directly to users.

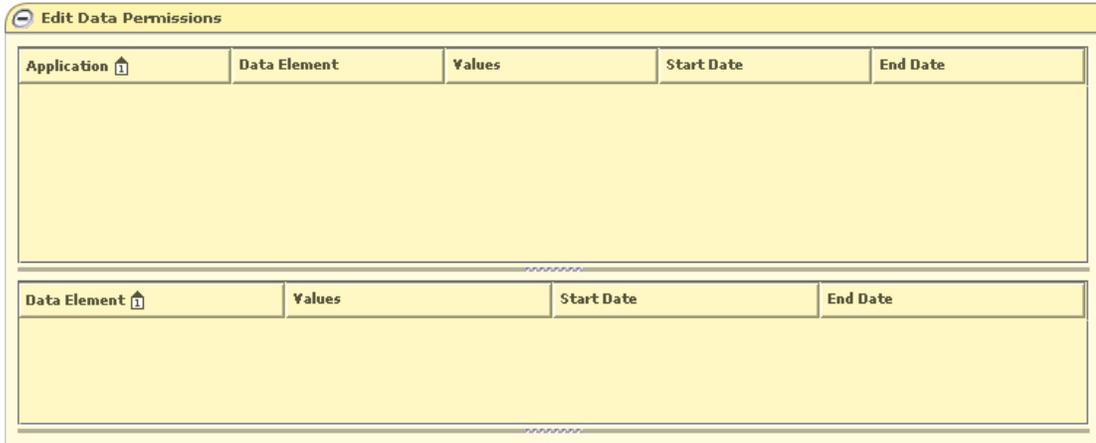
Procedures

Add a data permission to a role

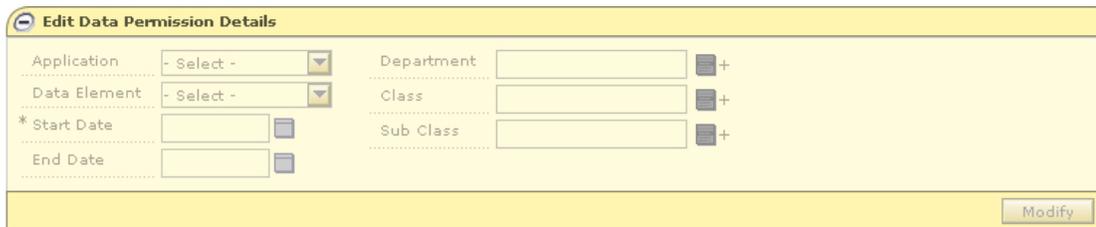
⇒ **Navigate:** From the Task Pad, select Role Administration > Edit Data Permission. The Edit Data Permissions workspace is displayed.



1. In the Role area, select a role.
2. Click **Edit** or double click on the role you want to edit. Information is displayed on the Edit Data Permission pane.



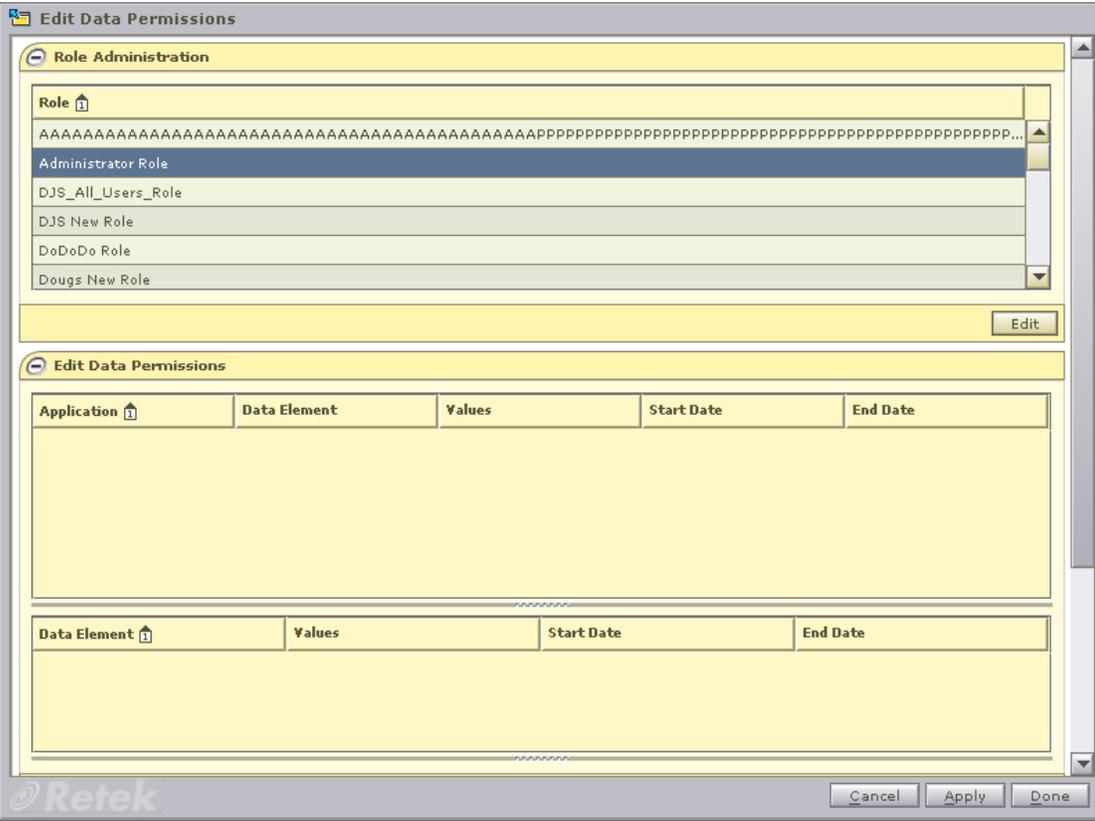
3. Click **New**. The Edit Data Permission Details pane is enabled.



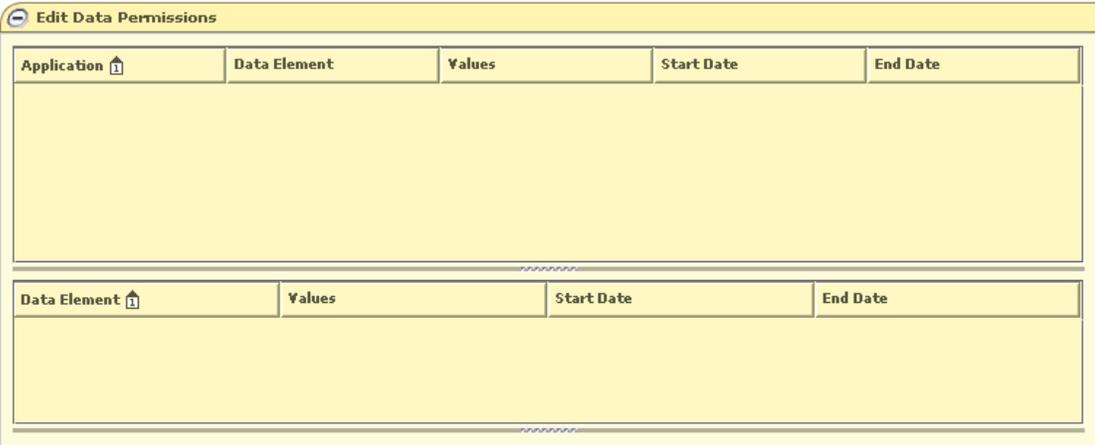
4. Select an application from the Application drop-down.
 5. Select an element from the Data Element drop-down.
 6. Enter a date in the Start Date field, or click the LOV  button and select a date.
 7. Enter a date in the End Date field, or click the LOV  button and select a date.
-  **Note:** The End Date field may be left blank.
8. Enter information in the rest of the enabled fields as required.
 9. Click **Apply**. Your changes are saved and displayed in the view area.

Delete a data permission from a role

⇒ **Navigate:** From the Task Pad, select Role Administration > Edit Data Permission. The Edit Data Permissions workspace is displayed.



- 1. In the Role area, select a role.
- 2. Click **Edit** or double click on the role you want to edit. Information is displayed on the Edit Data Permission pane.



- 3. Select the application from the Application table.
- 4. Select the data permission you wish to remove from the Data Element table.
- 5. Click **Remove**. The data permission is removed from the list.

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

Maintain password map

Overview

Password mapping can give users single sign on (SSO) capability. An individual's RSM user name and password can be linked with their user names and passwords from other applications. This gives the user the ability to sign on once to Retek Navigator and access any of the password protected applications available from Retek Navigator without having to sign on again.

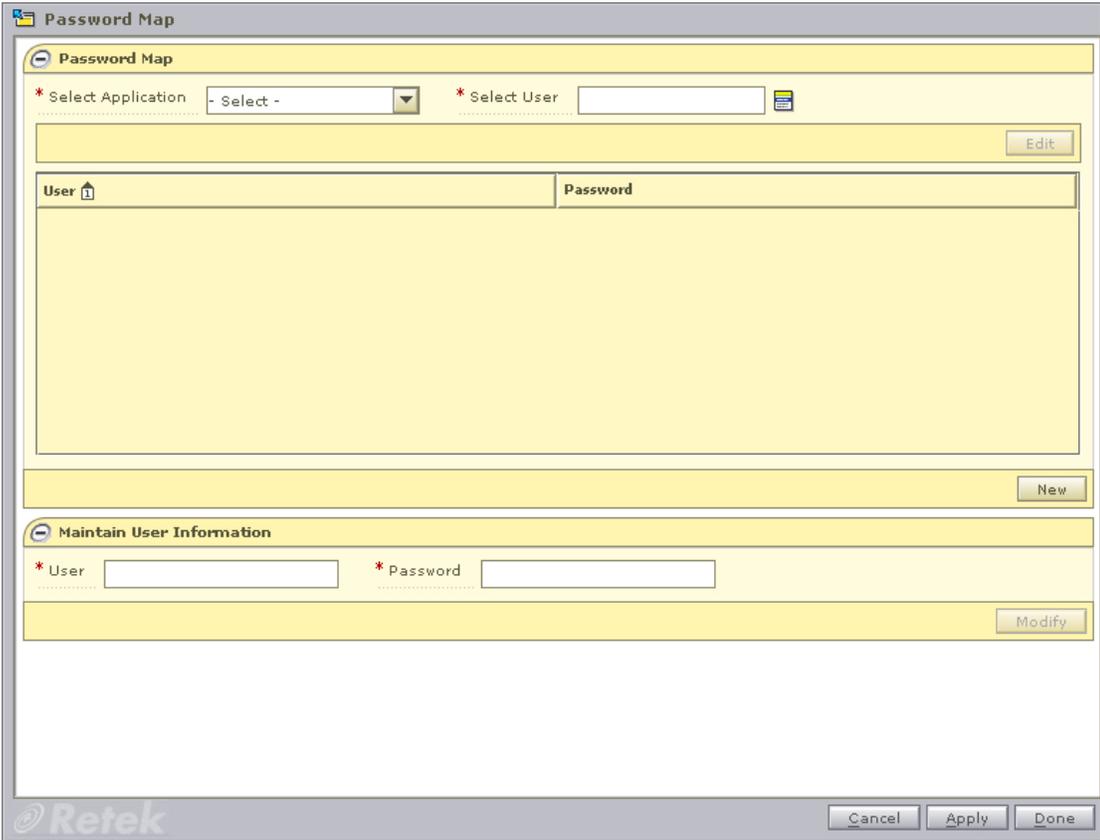
Use the Password Map workspace to add single users to applications and make changes to individual user names and passwords as necessary.

 **Note:** If a user name or password changes in the application it was created in. That change must be made in RSM as well for SSO capability to continue. Likewise, changes made to user names and passwords in RSM, will not be made in the application it was originally created in.

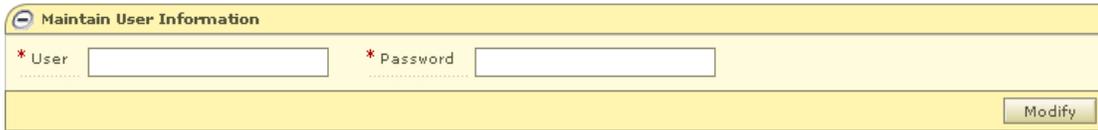
Procedures

Add a user to an application

⇒ **Navigate:** From the Task Pad, select Password Map > Password Map. The Password Map workspace is displayed.



1. Select an application from the Select Application drop-down.
2. Select a user from the User drop-down.
3. Click **New**. The Maintain User Information pane is enabled.

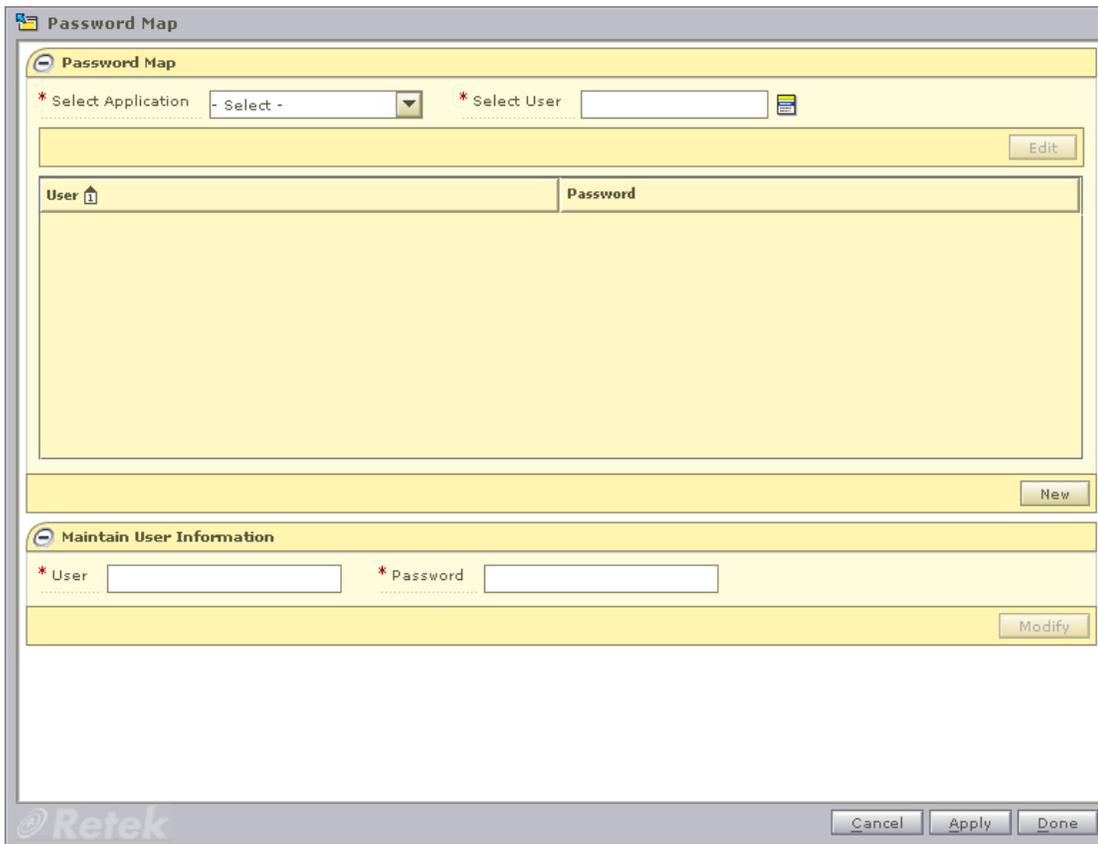


The screenshot shows a yellow-paneled window titled "Maintain User Information". It contains two input fields: "* User" and "* Password", both with red asterisks indicating they are required. A "Modify" button is located at the bottom right of the pane.

4. Enter the user name in the User field.
5. Enter the password in the Password field.
6. Click **Modify**. The user name/password combination is added to the table above.
7. Click **Apply**. The information is saved.

Maintain users of an application

⇒ **Navigate:** From the Task Pad, select Password Map > Password Map. The Password Map workspace is displayed.



The screenshot shows the "Password Map" workspace. At the top, there are two dropdown menus: "* Select Application" (currently showing "- Select -") and "* Select User". Below these is an "Edit" button. A table with two columns, "User" and "Password", is displayed. Below the table is a "New" button. At the bottom of the workspace is a "Maintain User Information" pane, which is identical to the one shown in the previous screenshot. The Retek logo is visible in the bottom left corner, and "Cancel", "Apply", and "Done" buttons are in the bottom right corner.

1. Select an application from the Select Application drop-down.
2. Select a user from the User drop-down.
3. Click **Edit**. The user name and password for the selected user appears in the table.

4. Select a user name and password from the table. The information appears in the Maintain User Information pane.



The screenshot shows a web form titled "Maintain User Information". It features two input fields: one labeled "* User" and another labeled "* Password". Both fields are currently empty. A "Modify" button is located at the bottom right of the form.

5. Edit the information in the User and Password fields as necessary.
6. Click **Modify**. The changes are reflected in the table above.