

HCM Security - Assigning Roles to Users

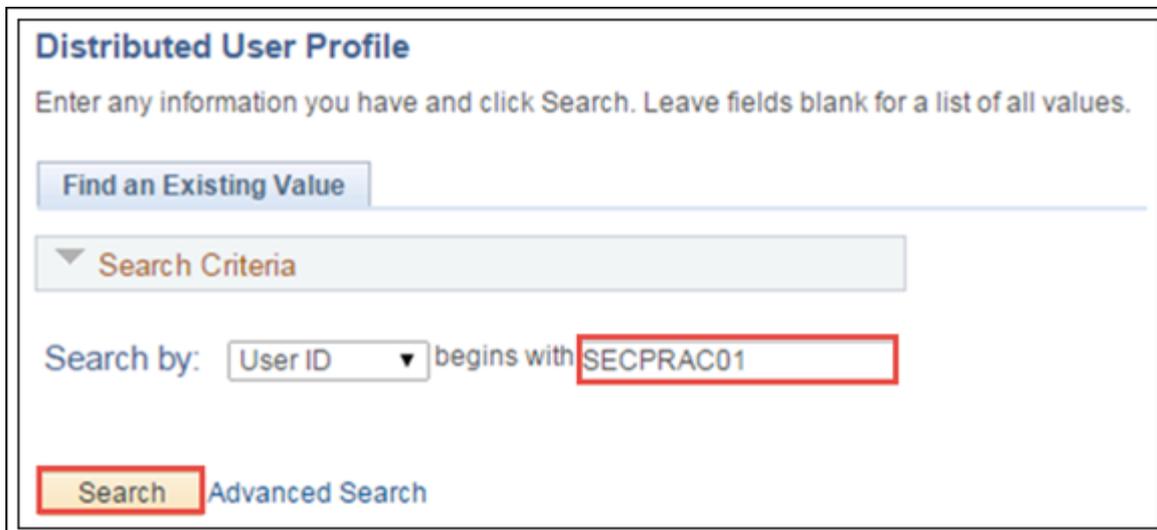
Purpose: Use this document as a reference for how to assign roles to users in ctLink.

Audience: HCM College Security Administrators

Step 1 - Assign User Roles - Using Distributed User Profiles

Navigation: Main Menu > PeopleTools > Security > User Profiles > Distributed User Profiles

1. Enter User ID in the Search by field on the **Distributed User Profile** page.
2. Click **Search**.



The screenshot shows the 'Distributed User Profile' search page. At the top, it says 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this is a search bar with a 'Find an Existing Value' button. Underneath is a 'Search Criteria' dropdown menu. The 'Search by:' field is set to 'User ID' and the search criteria is 'begins with SECPRAC01'. At the bottom, there are two buttons: 'Search' and 'Advanced Search'.

3. The General Tab

This page captures basic information about the user, including the User ID and name. From a security standpoint there are only two items of interest on this page. In the **Permission Lists** section at the bottom of the page there is a value for the **Primary** permission list and the **Row Security** permission list. These values impact a user's experience in PeopleSoft.

4. User Profiles ID Tab

This tab identifies the User's ID Type, Empl ID and Name.

General **ID** User Roles Workflow Audit

User ID: SECPRAC01
 Description: Sec Admin Practice User 1

ID Types and Values Find | View All First 1 of 1 Last

ID Type: **Employee**

Attribute Name	Attribute Value	Description
Empl ID	101	Kim,J

User Description

Description:

Set Description or type in User Description.

5. Navigate to the **User Roles** tab.
6. Determine the roles that the user needs for their job position.
7. Click the **Lookup** to see list of roles.
8. Click on the role that you want to add to the User's Profile.
9. Click the (+) button to add a new row - **NOTE: Most users will have multiple roles assigned.**
10. Repeats steps 7, 8 and 9 to include additional role(s).
11. Click **Save**.
12. Repeat process for multiple users.

General **5** **User Roles** Workflow Audit Links User ID Queries

User ID CTC_FUNCTIONAL
Description ctcLink Functional Setup

Dynamic Role Rule

Execute on Server

Test Rule(s) Refresh

Execute Rule(s)

[Process Monitor](#)
[Service Monitor](#)

User Roles		Personalize	Find	View All	First	2-11 of 24	Last
Role Name	Description	Dynamic					
CTC_ADM_REGISTRA	Admissions Registration Asst 3	<input type="checkbox"/>	Route Control				+ -
CTC_ADVISOR	Advisor	<input type="checkbox"/>	Route Control				+ -
CTC_BURSAR	Bursar	<input type="checkbox"/>	Route Control				+ -
CTC_CS_SUPER_USE	CS Super User	<input type="checkbox"/>	Route Control				+ -
CTC_CURRICULUM_C	Curriculum Officer	<input type="checkbox"/>	Route Control				+ -
CTC_EARLY_ALERT_f	Early Alert Reviewer 1	<input type="checkbox"/>	Route Control				+ -
CTC_EARLY_ALERT_f	Early Alert Reviewer 2	<input type="checkbox"/>	Route Control				+ -
CTC_FA_DIRECTOR	Fin. Aid Director	<input type="checkbox"/>	Route Control				+ -
CTC_FWL_HR_VIEWO	FWL HR View Only	<input type="checkbox"/>	Route Control				+ -
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	Route Control				+ -

11 Save Return to Search Previous in List Next in List Add Update/Display

General | ID | User Roles | Workflow | Audit | Links | User ID Queries

13. Navigate to the User Profile Audit tab. This is an informative page where you can see who was the last person to make a change to the user's security.

After adding roles to users there are three (3) processes that need to run before users will see data.