CS 9.2 - Advisors - Dynamic Role Access, Masking and Optional Role Recommendations

Purpose: Use this document to better understand how the *ZZ SS Advisor* role is granted dynamically, what the role provides access to, and how masking permissions control the visibility of content.

Audience: Local Security Administrators

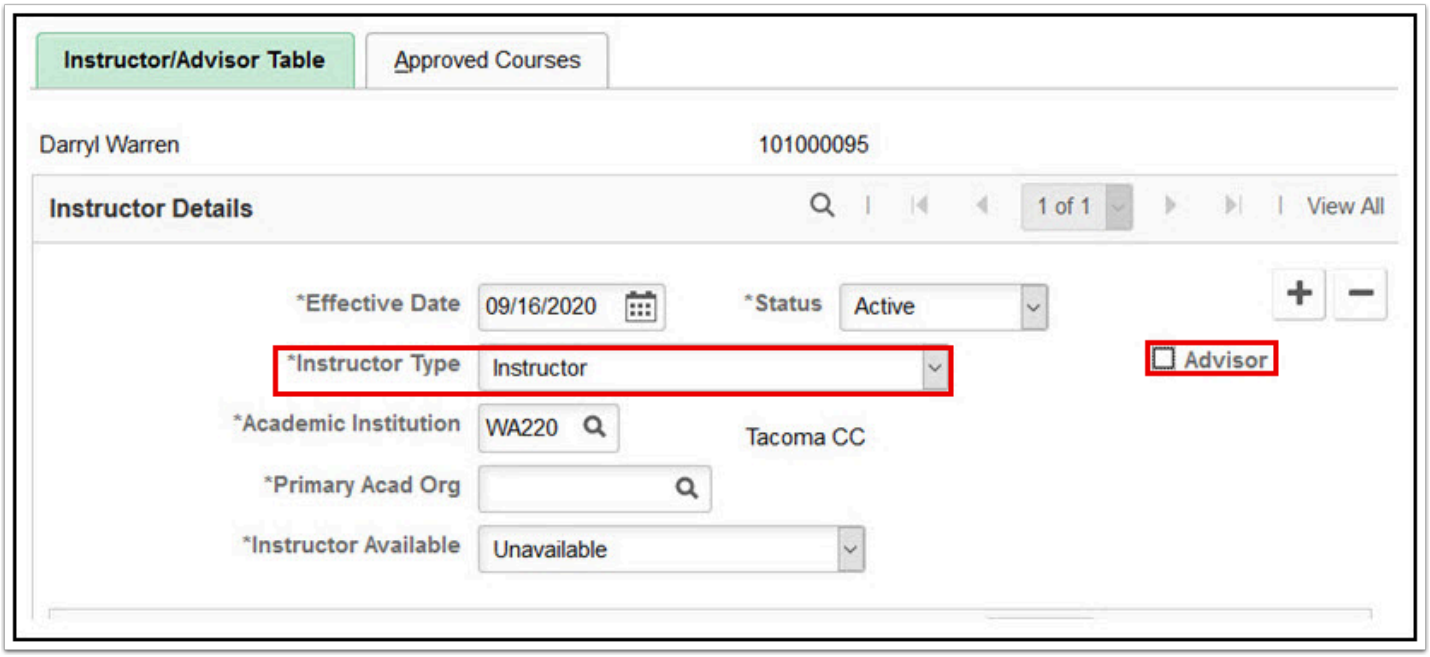
What Drives the Assignment of the ZZ SS Advisor Role

Some Roles are dynamically assigned by processes run periodically in the background. Dynamic Roles are assigned based on criteria and will be automatically removed if the criteria no longer exists when the process is next run. Some examples:

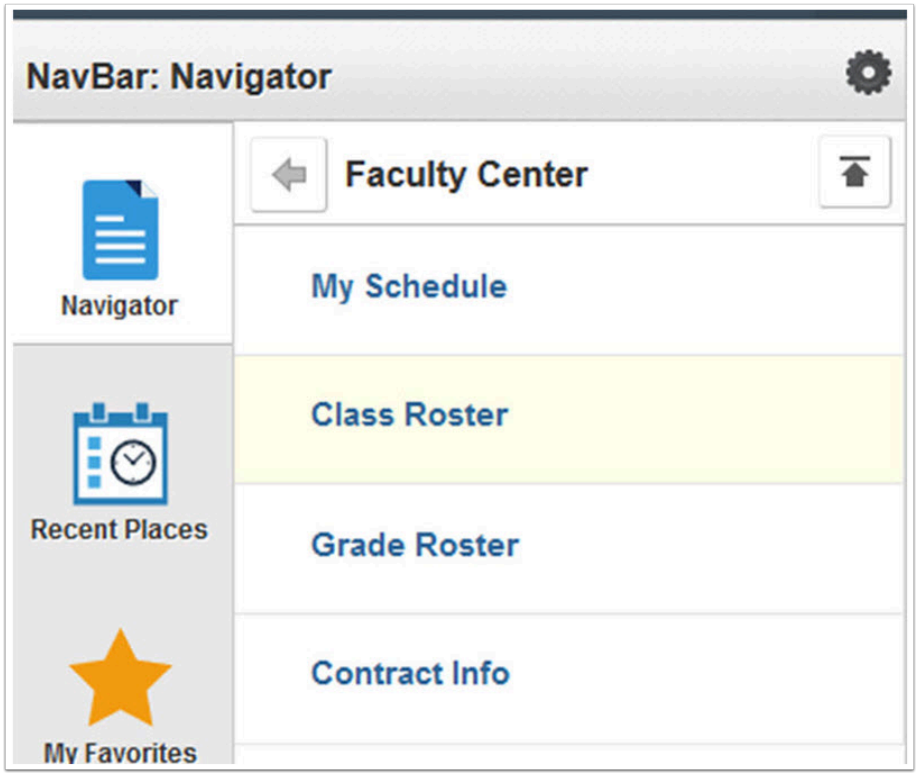
- Faculty assigned access to Faculty Center
- Advisors Only assigned access to Advising Center
- Faculty/Advisors assigned access to Advising Center

Identify Dynamically-assigned Faculty Role

If the user is faculty only, and not also an advisor, her Instructor/Advisor Table looks like this:

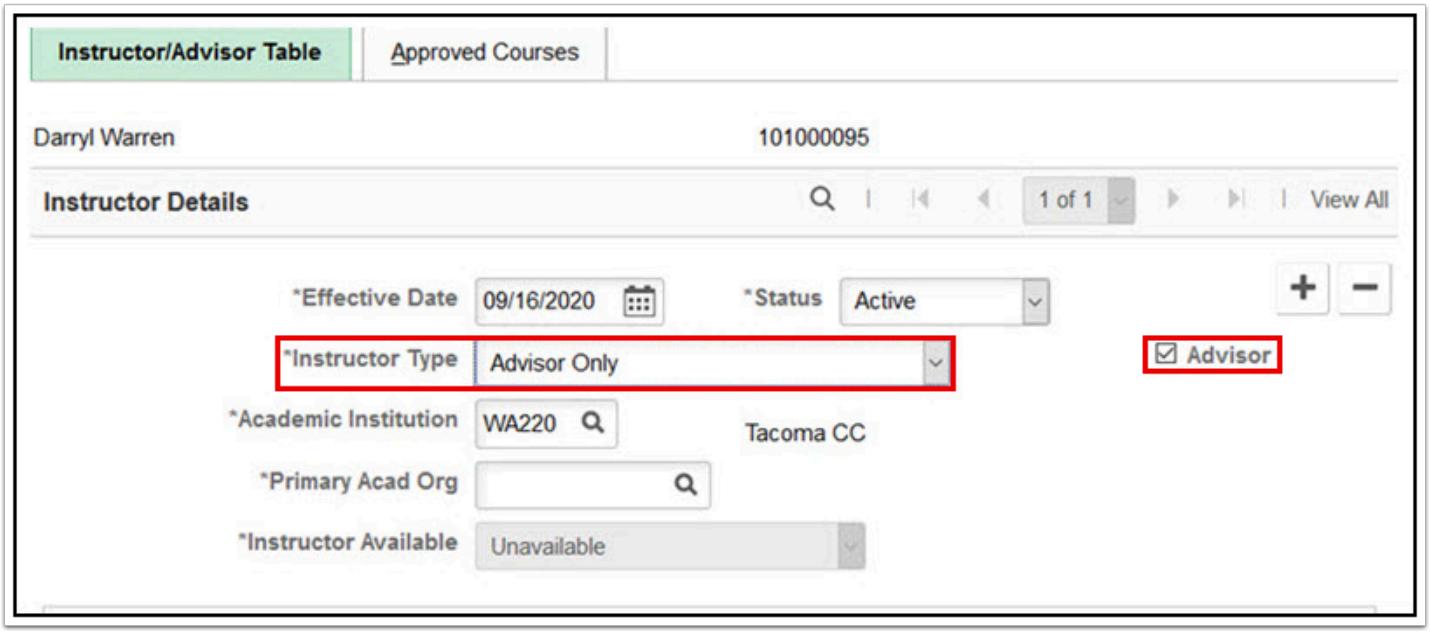


Her Faculty Center navigation looks like this:

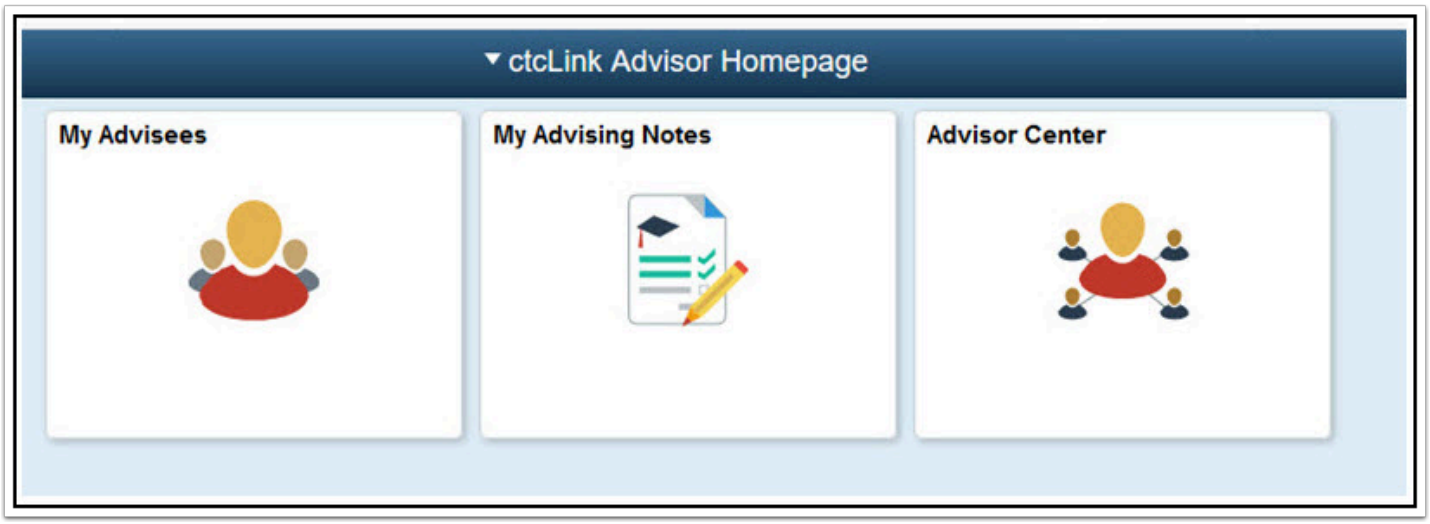


Identify Dynamically-assigned Advisor Role

If the user is advisor only, and not also faculty, her Instructor/Advisor Table looks like this:

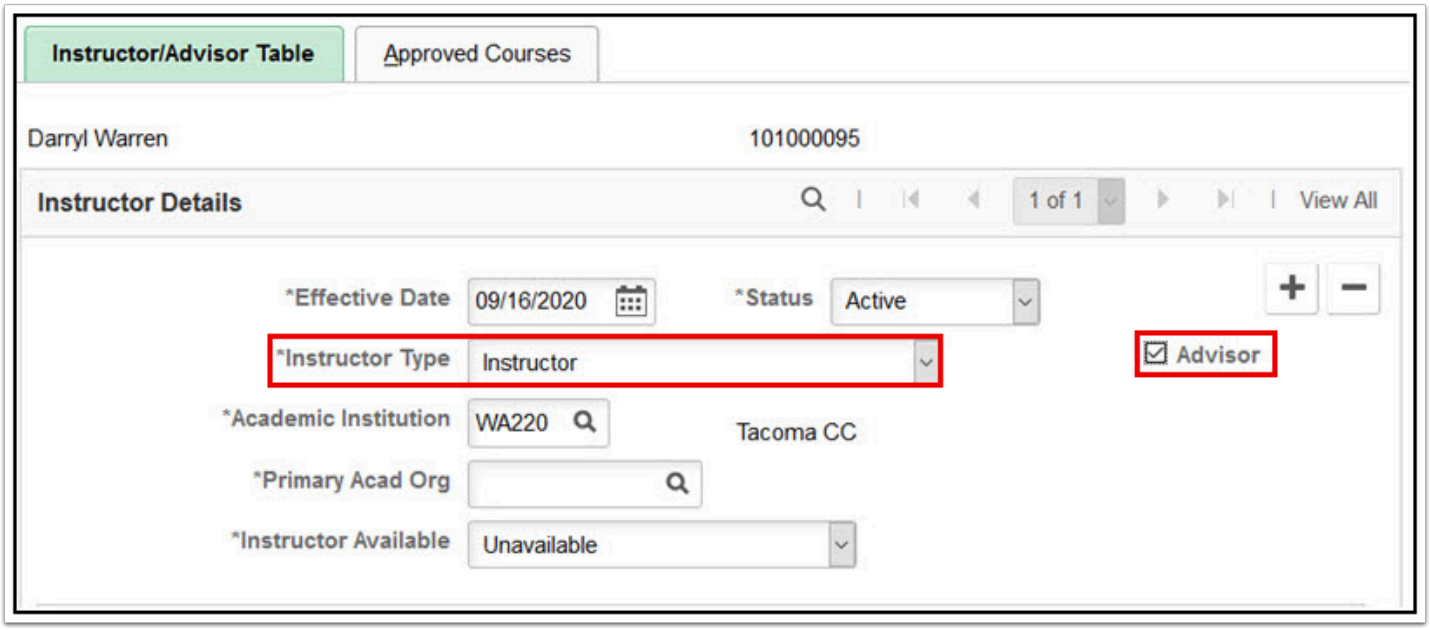


Her Advisor Center navigation looks like this:



Identify Dynamically-Assigned Faculty AND Advisor Roles

If the user is both an advisor and a faculty member, her Instructor/Advisor Table looks like this:



And, of course, she'll have both Faculty Center and Advisor Center navigation.

How the Campus Solutions Masking Options Work in Advising

Distributed User Profiles - General tab

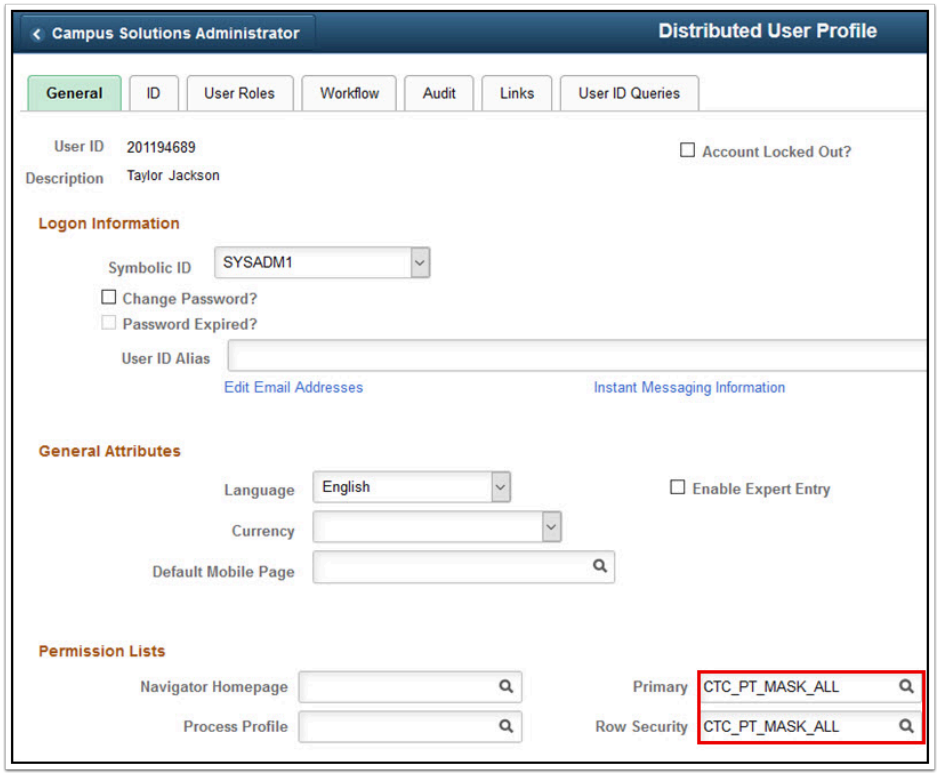
Four Masking Options - Campus Solutions Pillar

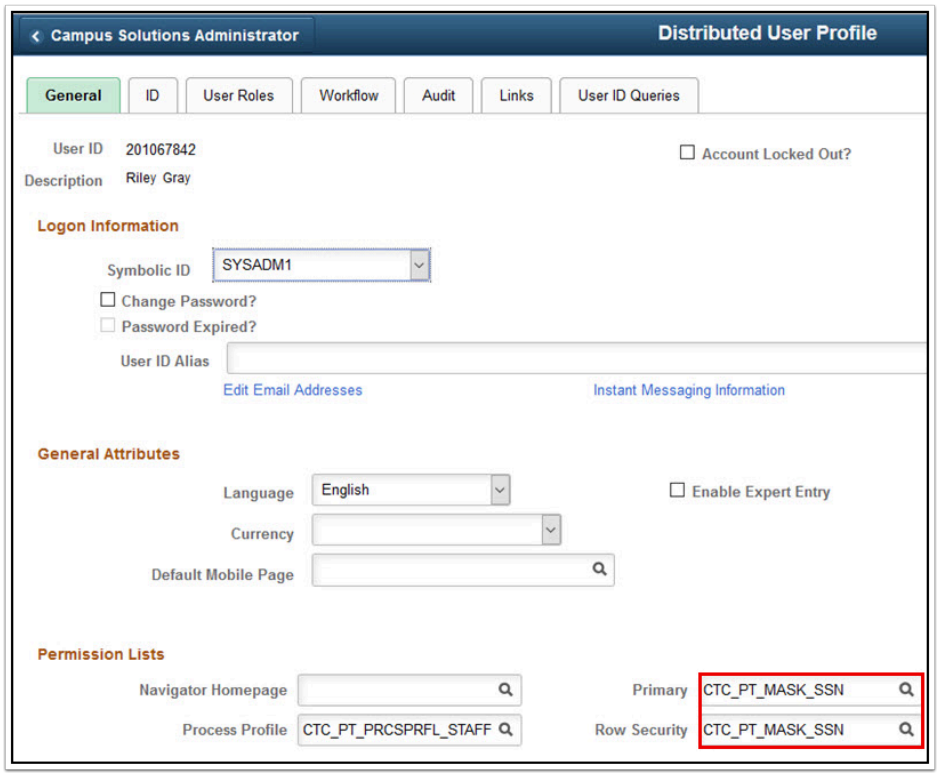
The format for the Distributed User Profiles General tab **Primary** and **Row Security** fields is: CTC_PT_MASK_xxxx, where 'xxxx' is the desired masking for two key personal information fields: Social Security Number (referred to as National ID or NID in PeopleSoft) and Date of Birth.

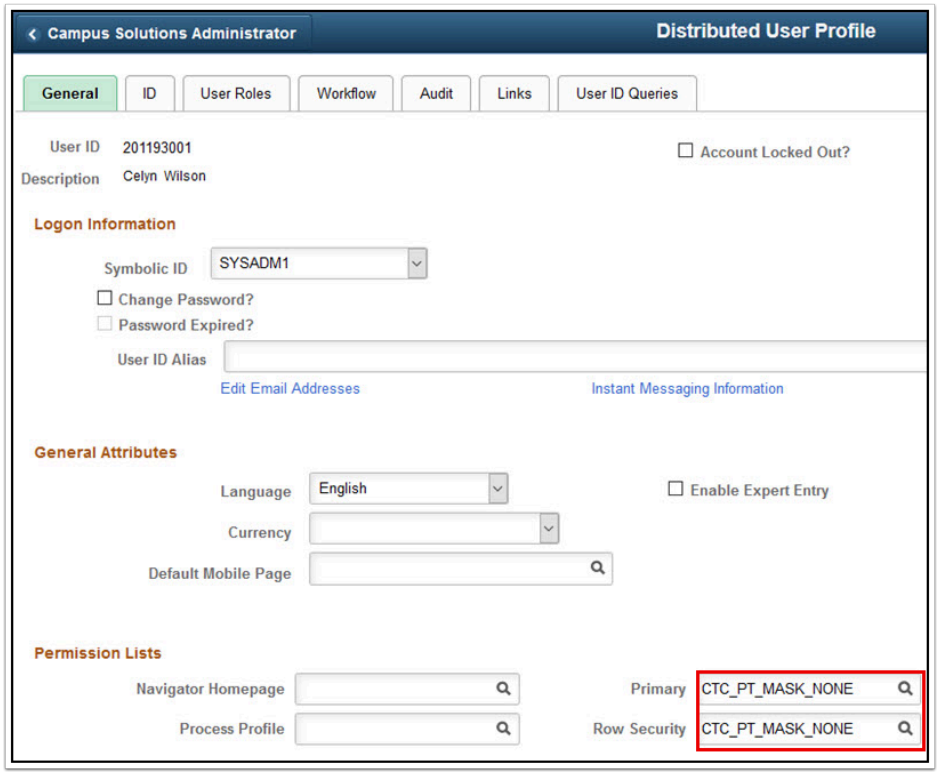
Valid values are:

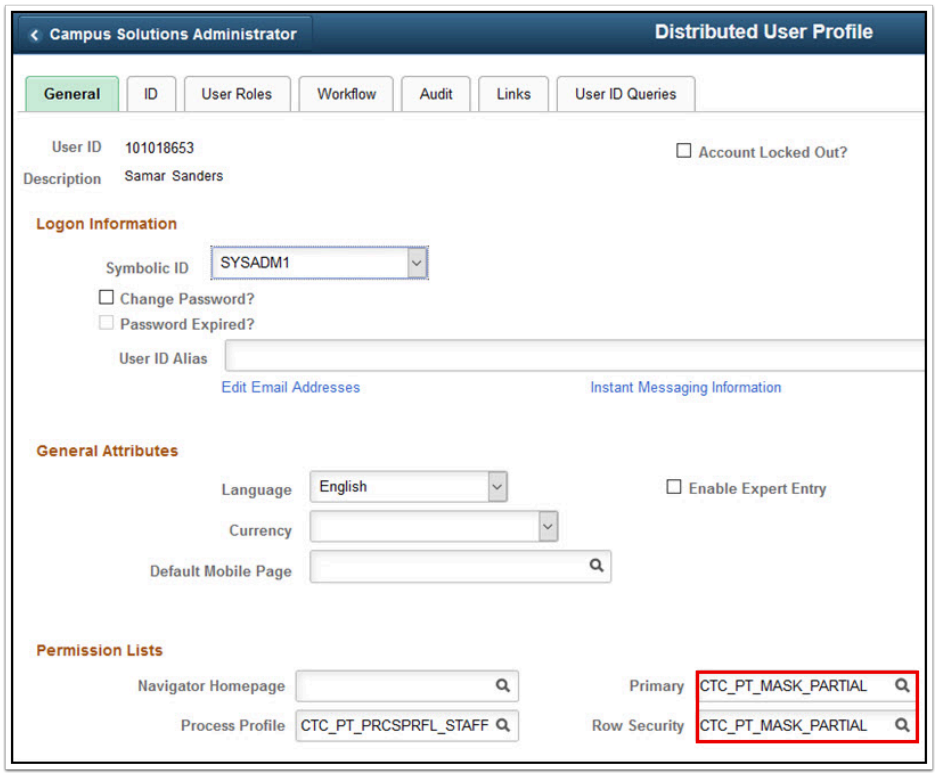
- **CTC_PT_MASK_ALL** (default) = Mask Social Security Number and Mask Date of Birth
- **CTC_PT_MASK_SSN** = Mask Social Security Number and Unmasked Date of Birth
- **CTC_PT_MASK_NONE** = Mask Social Security Number and Unmasked Date of Birth
- **CTC_PT_MASK_PARTIAL** = Mask Social Security Number and Partial Masking of the Date of Birth

Let's take a look at the Distributed User Profiles General tab for four different advisors, each of whom has one of the four masking values:



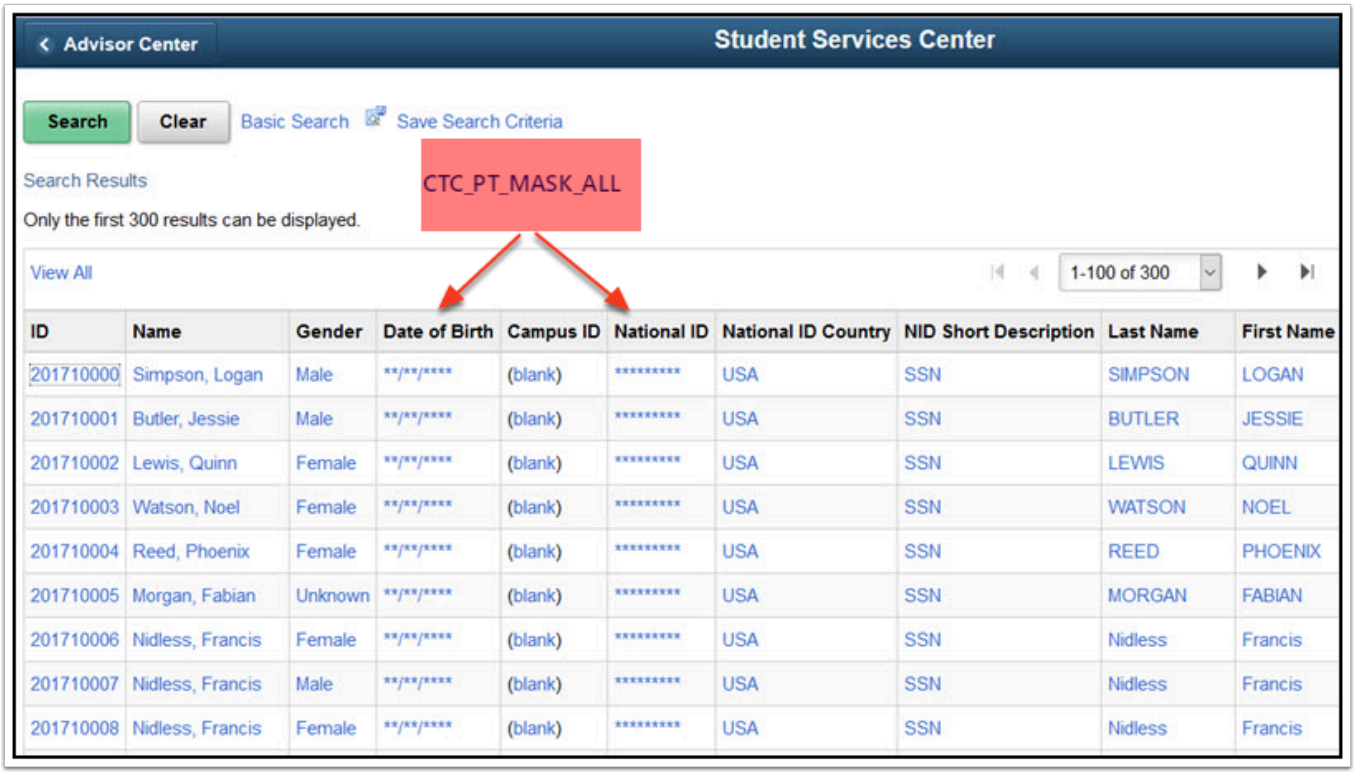

Campus Solutions Administrator
Distributed User Profile
General
ID
User Roles
Workflow
Audit
Links
User ID Queries
User ID 201067842
Description Riley Gray
Account Locked Out?
Logon Information
Symbolic ID SYSADM1
Change Password?
Password Expired?
User ID Alias
Edit Email Addresses
Instant Messaging Information
General Attributes
Language English
Enable Expert Entry
Currency
Default Mobile Page
Permission Lists
Navigator Homepage
Primary CTC_PT_MASK_SSN
Process Profile CTC_PT_PRCSPRFL_STAFF
Row Security CTC_PT_MASK_SSN


Campus Solutions Administrator
Distributed User Profile
General
ID
User Roles
Workflow
Audit
Links
User ID Queries
User ID 201193001
Description Celyn Wilson
Account Locked Out?
Logon Information
Symbolic ID SYSADM1
Change Password?
Password Expired?
User ID Alias
Edit Email Addresses
Instant Messaging Information
General Attributes
Language English
Enable Expert Entry
Currency
Default Mobile Page
Permission Lists
Navigator Homepage
Primary CTC_PT_MASK_NONE
Process Profile
Row Security CTC_PT_MASK_NONE

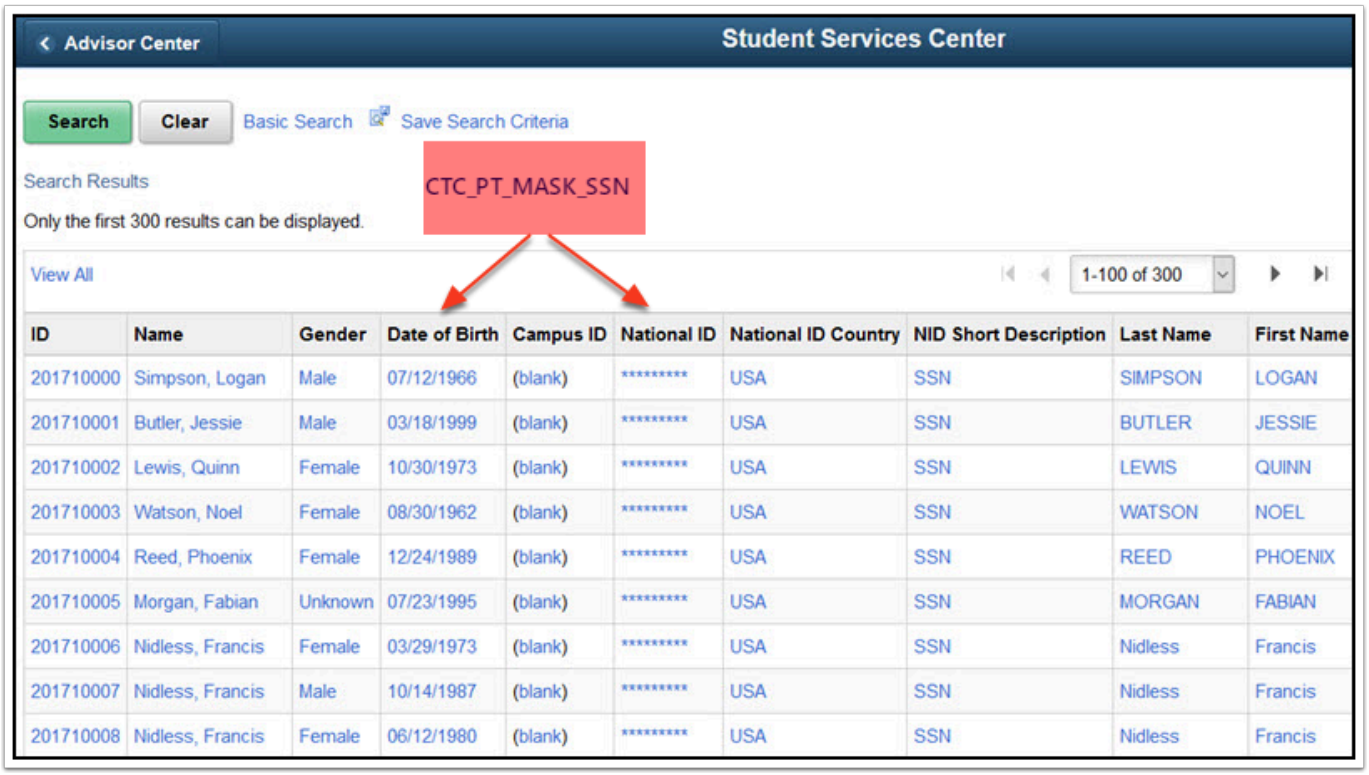


Student Services Center (Student) - Search page

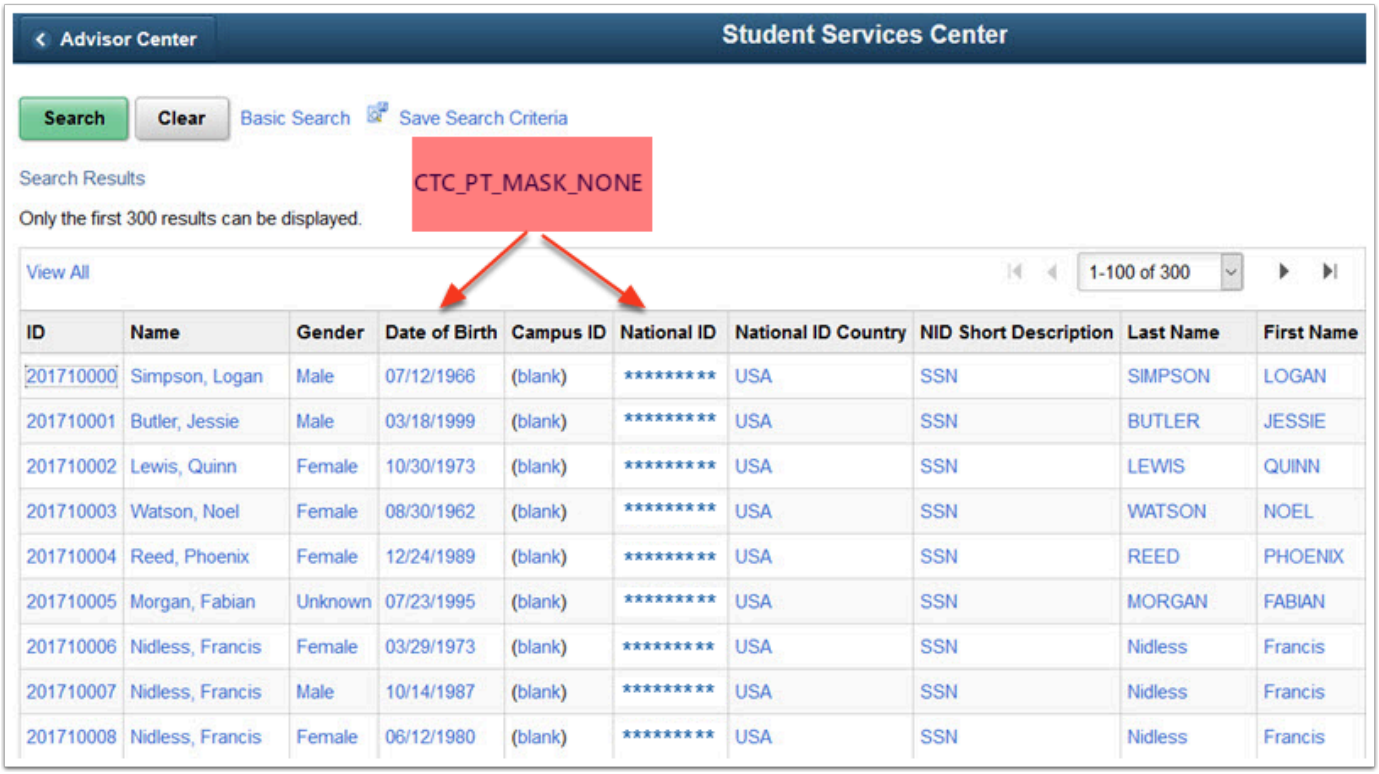
Now let's look at the Student Services Center (Student) search page for each of our four advisors, so we can see the results of the masking values:



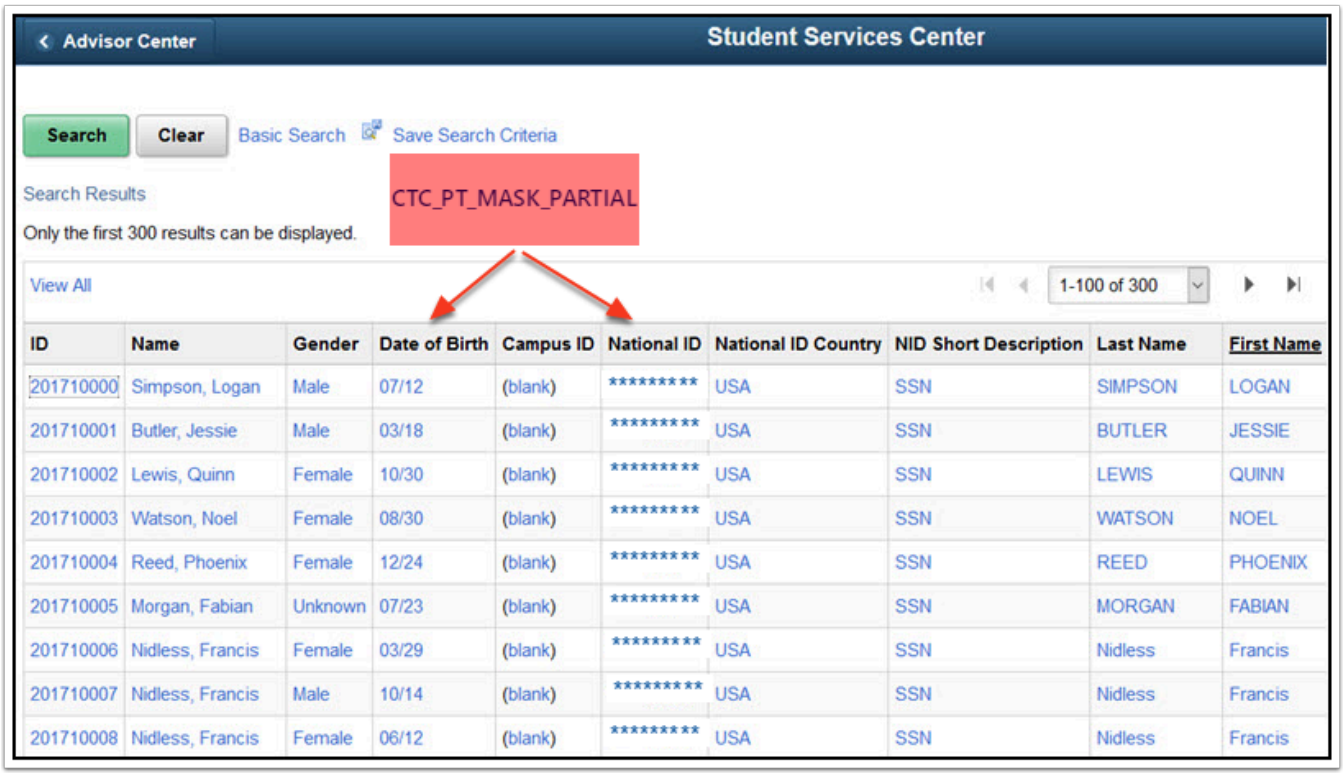
ID	Name	Gender	Date of Birth	Campus ID	National ID	National ID Country	NID Short Description	Last Name	First Name
201710000	Simpson, Logan	Male	**/**/****	(blank)	*********	USA	SSN	SIMPSON	LOGAN
201710001	Butler, Jessie	Male	**/**/****	(blank)	*********	USA	SSN	BUTLER	JESSIE
201710002	Lewis, Quinn	Female	**/**/****	(blank)	*********	USA	SSN	LEWIS	QUINN
201710003	Watson, Noel	Female	**/**/****	(blank)	*********	USA	SSN	WATSON	NOEL
201710004	Reed, Phoenix	Female	**/**/****	(blank)	*********	USA	SSN	REED	PHOENIX
201710005	Morgan, Fabian	Unknown	**/**/****	(blank)	*********	USA	SSN	MORGAN	FABIAN
201710006	Nidless, Francis	Female	**/**/****	(blank)	*********	USA	SSN	Nidless	Francis
201710007	Nidless, Francis	Male	**/**/****	(blank)	*********	USA	SSN	Nidless	Francis
201710008	Nidless, Francis	Female	**/**/****	(blank)	*********	USA	SSN	Nidless	Francis



ID	Name	Gender	Date of Birth	Campus ID	National ID	National ID Country	NID Short Description	Last Name	First Name
201710000	Simpson, Logan	Male	07/12/1966	(blank)	*********	USA	SSN	SIMPSON	LOGAN
201710001	Butler, Jessie	Male	03/18/1999	(blank)	*********	USA	SSN	BUTLER	JESSIE
201710002	Lewis, Quinn	Female	10/30/1973	(blank)	*********	USA	SSN	LEWIS	QUINN
201710003	Watson, Noel	Female	08/30/1962	(blank)	*********	USA	SSN	WATSON	NOEL
201710004	Reed, Phoenix	Female	12/24/1989	(blank)	*********	USA	SSN	REED	PHOENIX
201710005	Morgan, Fabian	Unknown	07/23/1995	(blank)	*********	USA	SSN	MORGAN	FABIAN
201710006	Nidless, Francis	Female	03/29/1973	(blank)	*********	USA	SSN	Nidless	Francis
201710007	Nidless, Francis	Male	10/14/1987	(blank)	*********	USA	SSN	Nidless	Francis
201710008	Nidless, Francis	Female	06/12/1980	(blank)	*********	USA	SSN	Nidless	Francis



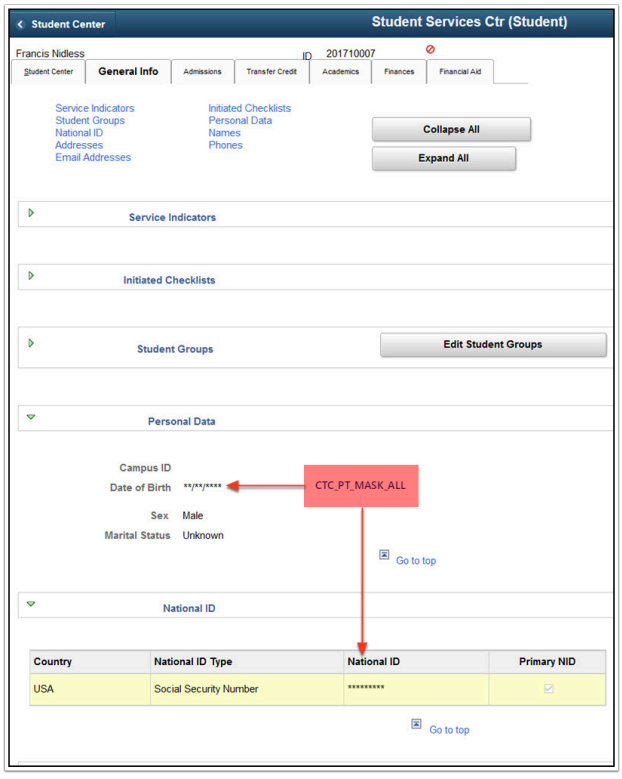
ID	Name	Gender	Date of Birth	Campus ID	National ID	National ID Country	NID Short Description	Last Name	First Name
201710000	Simpson, Logan	Male	07/12/1966	(blank)	*********	USA	SSN	SIMPSON	LOGAN
201710001	Butler, Jessie	Male	03/18/1999	(blank)	*********	USA	SSN	BUTLER	JESSIE
201710002	Lewis, Quinn	Female	10/30/1973	(blank)	*********	USA	SSN	LEWIS	QUINN
201710003	Watson, Noel	Female	08/30/1962	(blank)	*********	USA	SSN	WATSON	NOEL
201710004	Reed, Phoenix	Female	12/24/1989	(blank)	*********	USA	SSN	REED	PHOENIX
201710005	Morgan, Fabian	Unknown	07/23/1995	(blank)	*********	USA	SSN	MORGAN	FABIAN
201710006	Nidless, Francis	Female	03/29/1973	(blank)	*********	USA	SSN	Nidless	Francis
201710007	Nidless, Francis	Male	10/14/1987	(blank)	*********	USA	SSN	Nidless	Francis
201710008	Nidless, Francis	Female	06/12/1980	(blank)	*********	USA	SSN	Nidless	Francis

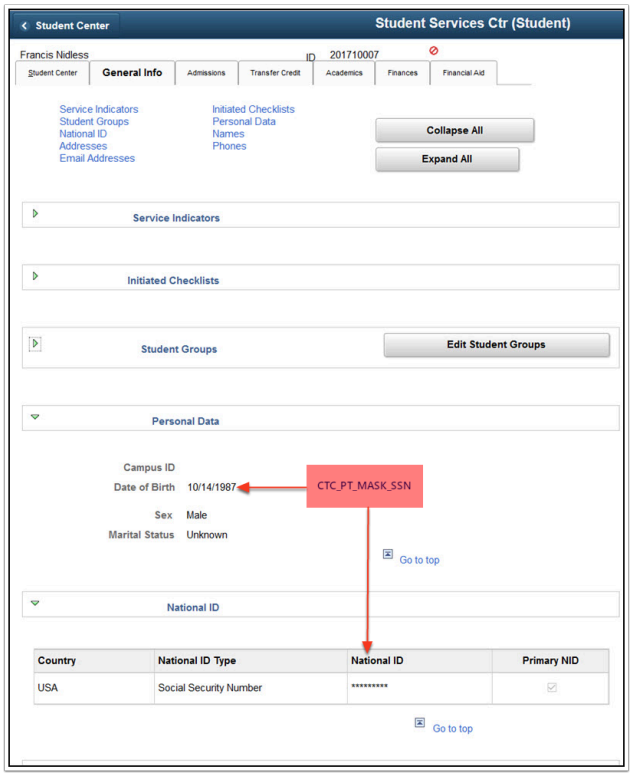


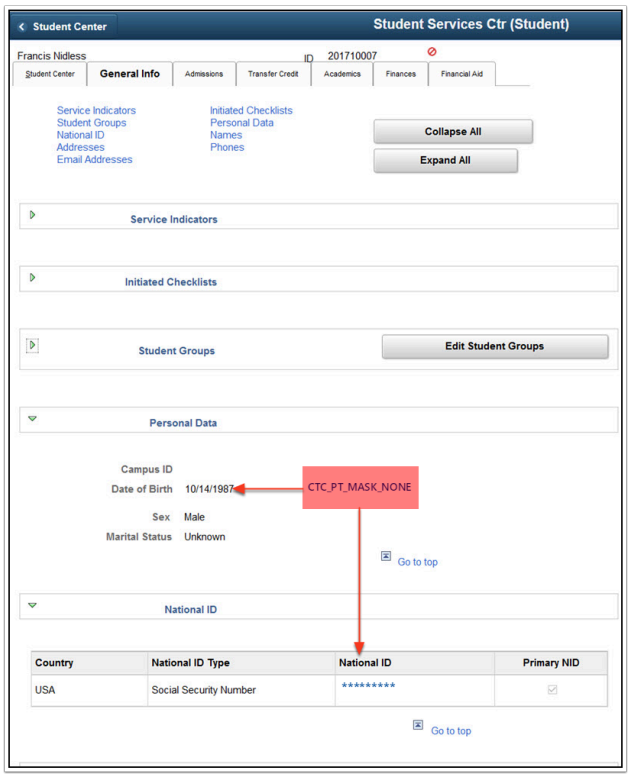
ID	Name	Gender	Date of Birth	Campus ID	National ID	National ID Country	NID Short Description	Last Name	First Name
201710000	Simpson, Logan	Male	07/12	(blank)	*********	USA	SSN	SIMPSON	LOGAN
201710001	Butler, Jessie	Male	03/18	(blank)	*********	USA	SSN	BUTLER	JESSIE
201710002	Lewis, Quinn	Female	10/30	(blank)	*********	USA	SSN	LEWIS	QUINN
201710003	Watson, Noel	Female	08/30	(blank)	*********	USA	SSN	WATSON	NOEL
201710004	Reed, Phoenix	Female	12/24	(blank)	*********	USA	SSN	REED	PHOENIX
201710005	Morgan, Fabian	Unknown	07/23	(blank)	*********	USA	SSN	MORGAN	FABIAN
201710006	Nidless, Francis	Female	03/29	(blank)	*********	USA	SSN	Nidless	Francis
201710007	Nidless, Francis	Male	10/14	(blank)	*********	USA	SSN	Nidless	Francis
201710008	Nidless, Francis	Female	06/12	(blank)	*********	USA	SSN	Nidless	Francis

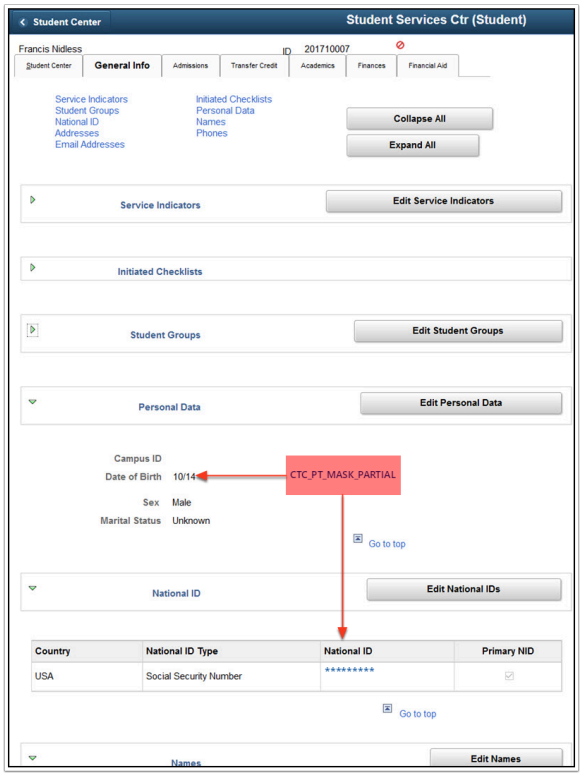
Student Services Center (Student) - General Info tab

Next we'll select a student from the search page for each of our four advisors, so we can see the results of the masking values in the General Info tab:




Student Center
Student Services Ctr (Student)
Francis Nidless
ID 201710007
Student Center
General Info
Admissions
Transfer Credit
Academics
Finances
Financial Aid
Service Indicators
Student Groups
National ID
Addresses
Email Addresses
Initiated Checklists
Personal Data
Names
Phones
Collapse All
Expand All
Service Indicators
Initiated Checklists
Student Groups
Edit Student Groups
Personal Data
Campus ID
Date of Birth 10/14/1987
CTC_PT_MASK_SSN
Sex Male
Marital Status Unknown
Go to top
National ID
Country
National ID Type
National ID
Primary NID
USA
Social Security Number
****
Go to top

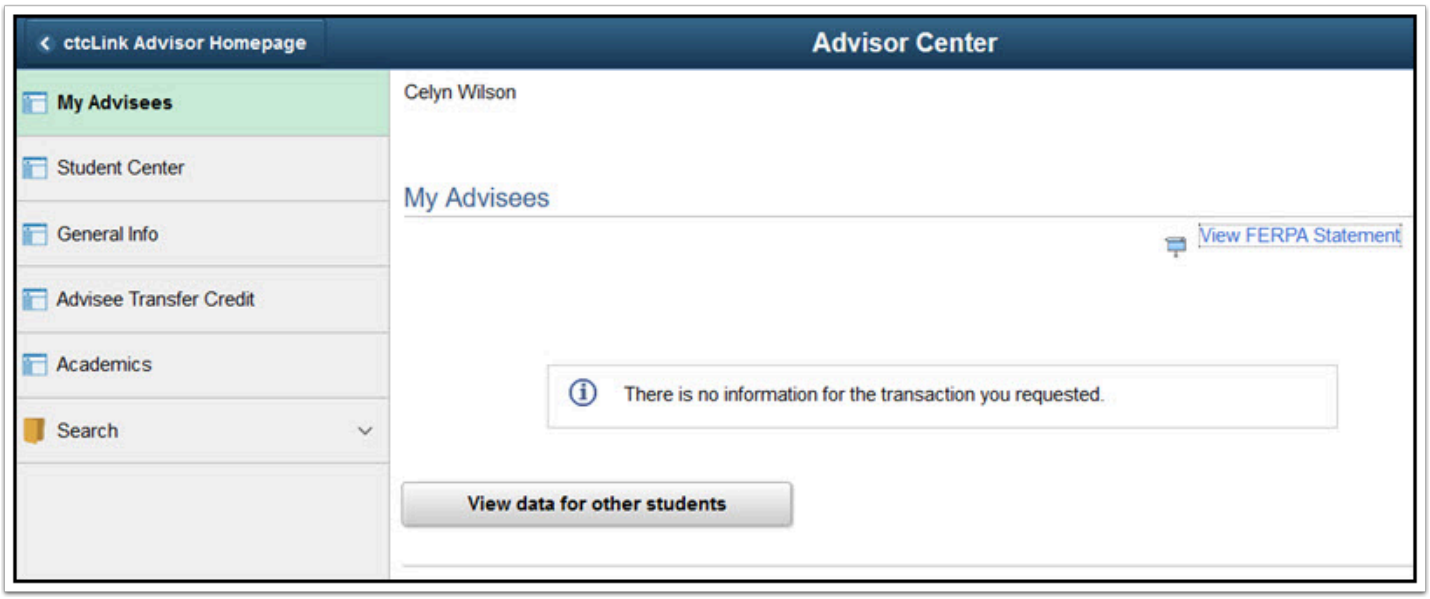

Student Center
Student Services Ctr (Student)
Francis Nidless
ID 201710007
Student Center
General Info
Admissions
Transfer Credit
Academics
Finances
Financial Aid
Service Indicators
Student Groups
National ID
Addresses
Email Addresses
Initiated Checklists
Personal Data
Names
Phones
Collapse All
Expand All
Service Indicators
Initiated Checklists
Student Groups
Edit Student Groups
Personal Data
Campus ID
Date of Birth 10/14/1987
CTC_PT_MASK_NONE
Sex Male
Marital Status Unknown
Go to top
National ID
Country
National ID Type
National ID
Primary NID
USA
Social Security Number
****
Go to top



Advisor Homepage and Advisor Center Tile

Here's what the Advisor Homepage looks like for any of our four advisors:

And here's what happens when the advisor clicks the Advisor Center tile on the Advisor Homepage:

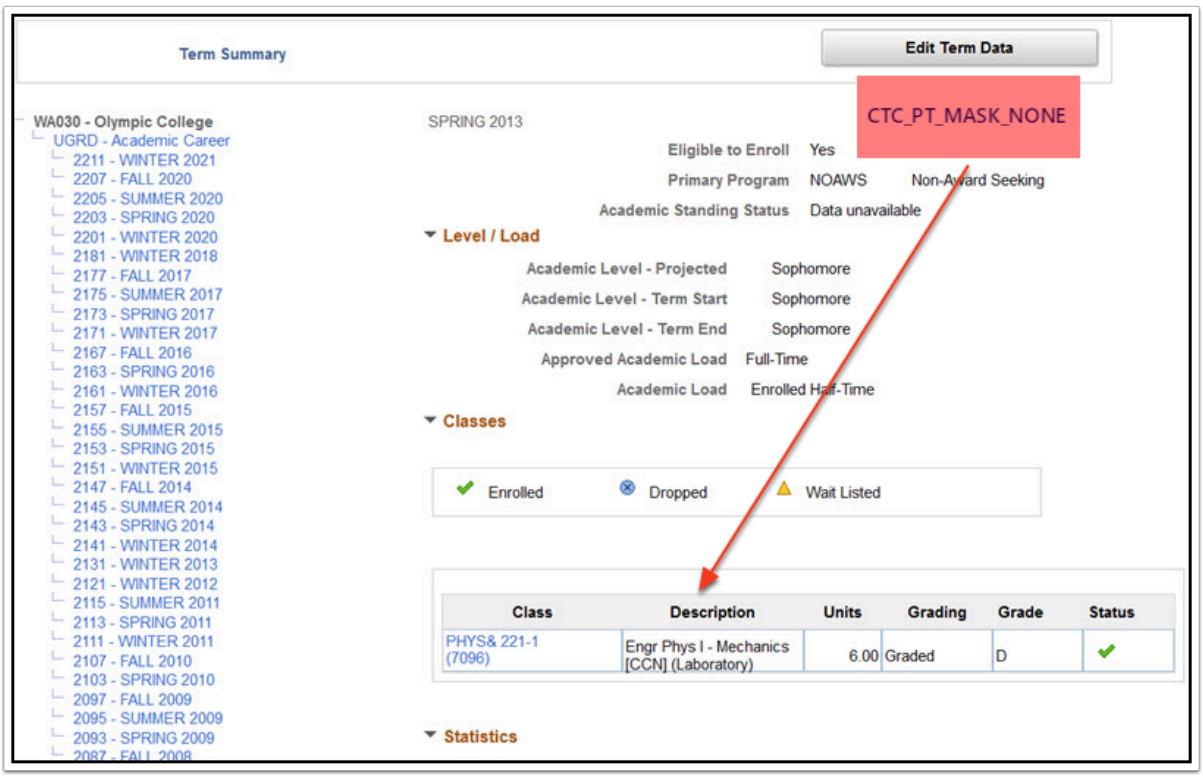


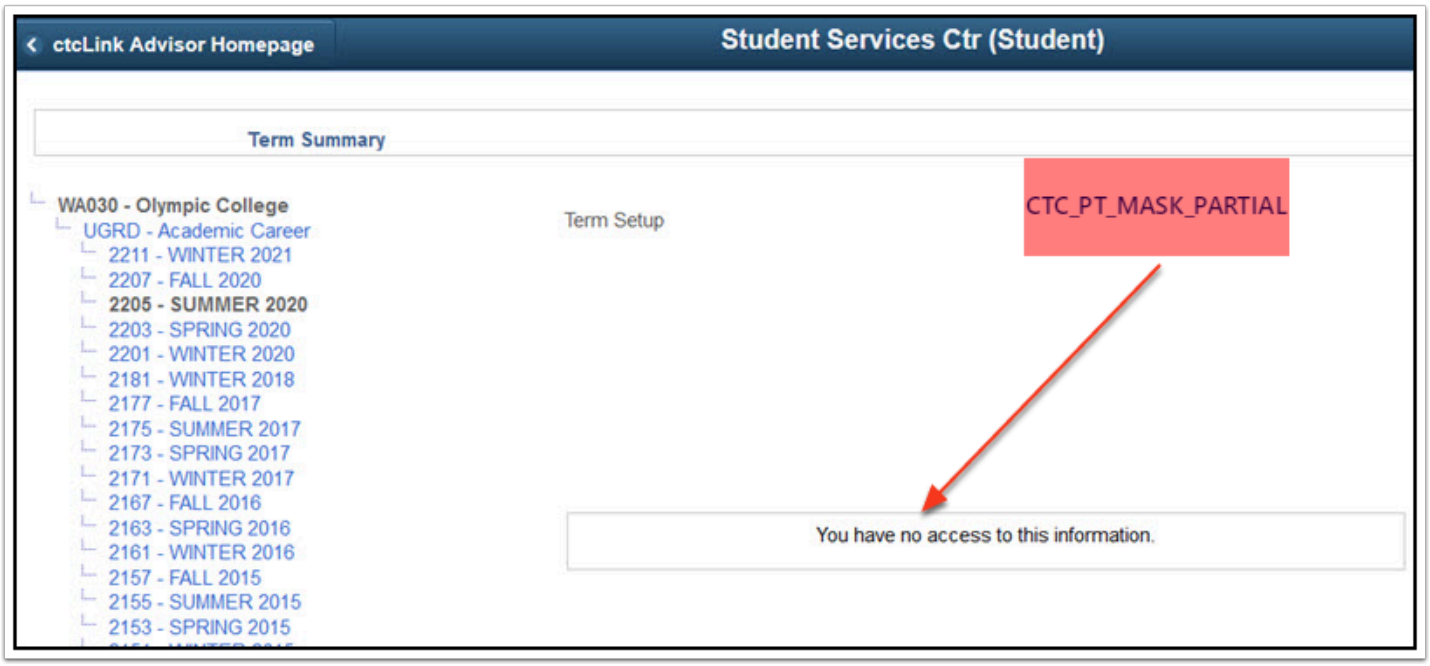
What Can the Advisor See in Student Services Center (Student)?

Academic Tab - Class Term Data

Now we'll look at class term data on the Academic tab for each of our four advisors:

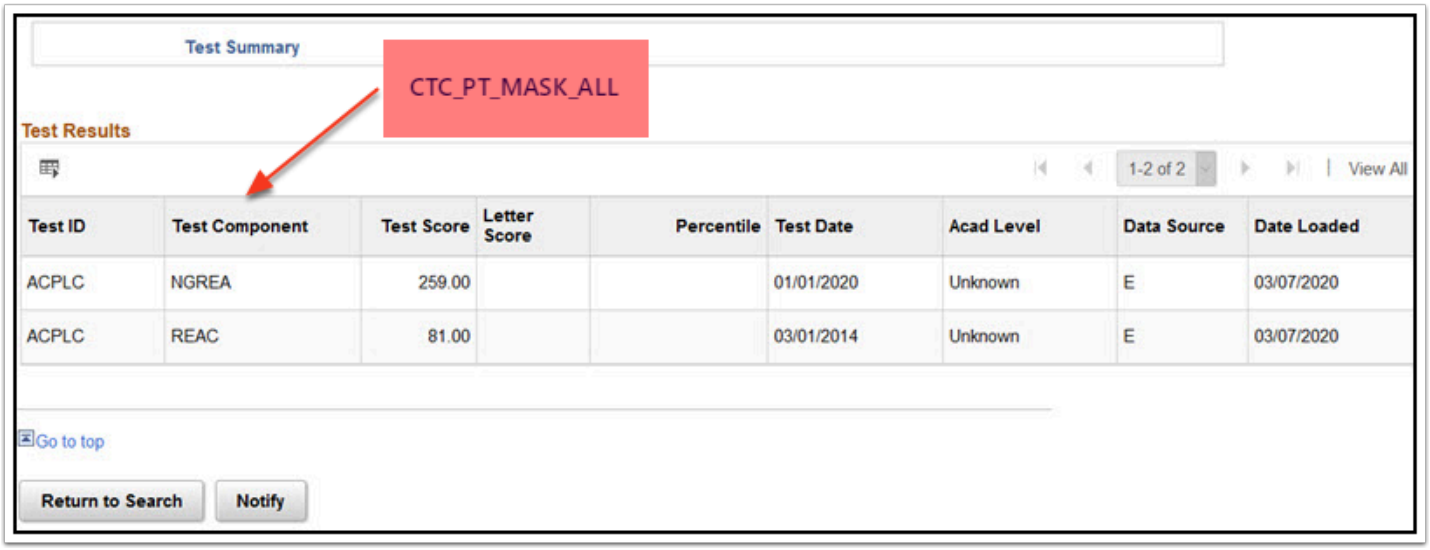
Term Summary
Edit Term Data
CTC_PT_MASK_SSN
WA030 - Olympic College
UGRD - Academic Career
2211 - WINTER 2021
2207 - FALL 2020
2205 - SUMMER 2020
2203 - SPRING 2020
2201 - WINTER 2020
2181 - WINTER 2018
2177 - FALL 2017
2175 - SUMMER 2017
2173 - SPRING 2017
2171 - WINTER 2017
2167 - FALL 2016
2163 - SPRING 2016
2161 - WINTER 2016
2157 - FALL 2015
2155 - SUMMER 2015
Term Setup
You have no access to this information.

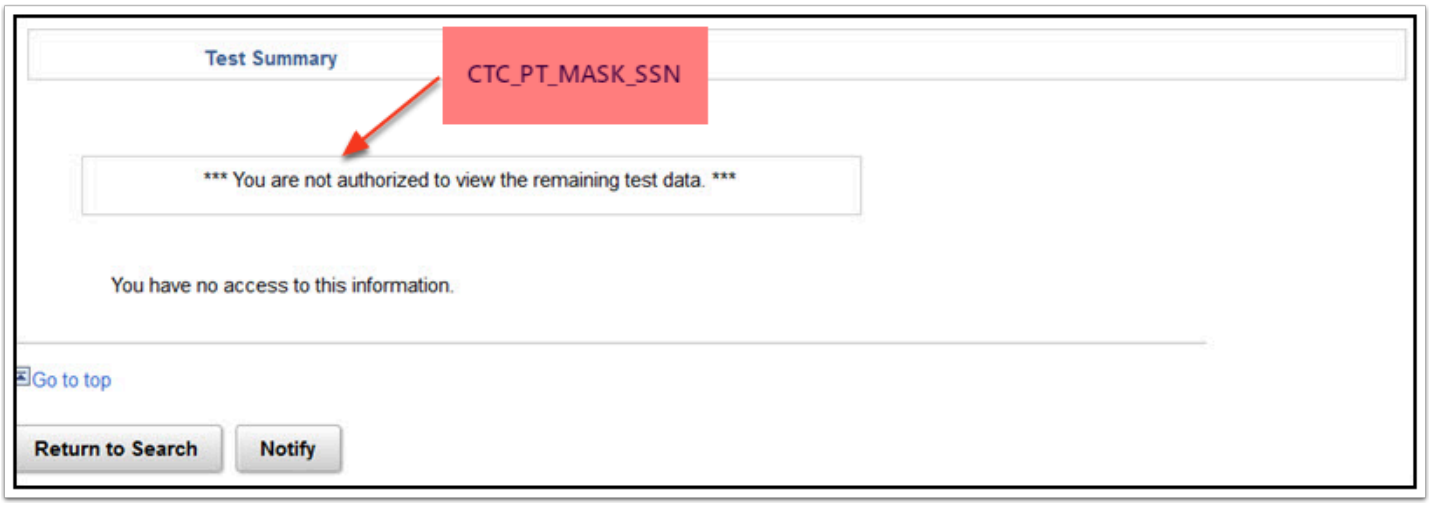

Term Summary
Edit Term Data
CTC_PT_MASK_NONE
WA030 - Olympic College
UGRD - Academic Career
2211 - WINTER 2021
2207 - FALL 2020
2205 - SUMMER 2020
2203 - SPRING 2020
2201 - WINTER 2020
2181 - WINTER 2018
2177 - FALL 2017
2175 - SUMMER 2017
2173 - SPRING 2017
2171 - WINTER 2017
2167 - FALL 2016
2163 - SPRING 2016
2161 - WINTER 2016
2157 - FALL 2015
2155 - SUMMER 2015
2153 - SPRING 2015
2151 - WINTER 2015
2147 - FALL 2014
2145 - SUMMER 2014
2143 - SPRING 2014
2141 - WINTER 2014
2131 - WINTER 2013
2121 - WINTER 2012
2115 - SUMMER 2011
2113 - SPRING 2011
2111 - WINTER 2011
2107 - FALL 2010
2103 - SPRING 2010
2097 - FALL 2009
2095 - SUMMER 2009
2093 - SPRING 2009
SPRING 2013
Eligible to Enroll Yes
Primary Program NOAWS Non-Award Seeking
Academic Standing Status Data unavailable
Level / Load
Academic Level - Projected Sophomore
Academic Level - Term Start Sophomore
Academic Level - Term End Sophomore
Approved Academic Load Full-Time
Academic Load Enrolled Half-Time
Classes
Enrolled
Dropped
Wait Listed
Class
Description
Units
Grading
Grade
Status
PHYS& 221-1 (7096)
Engr Phys I - Mechanics [CCN] (Laboratory)
6.00
Graded
D
Statistics

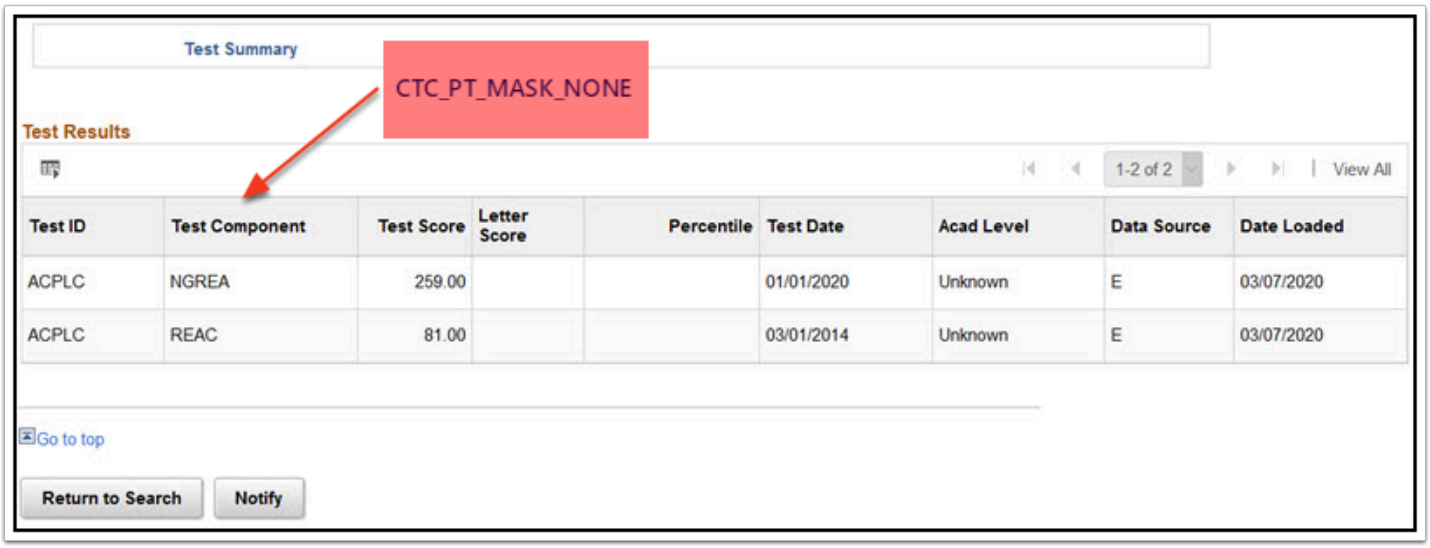


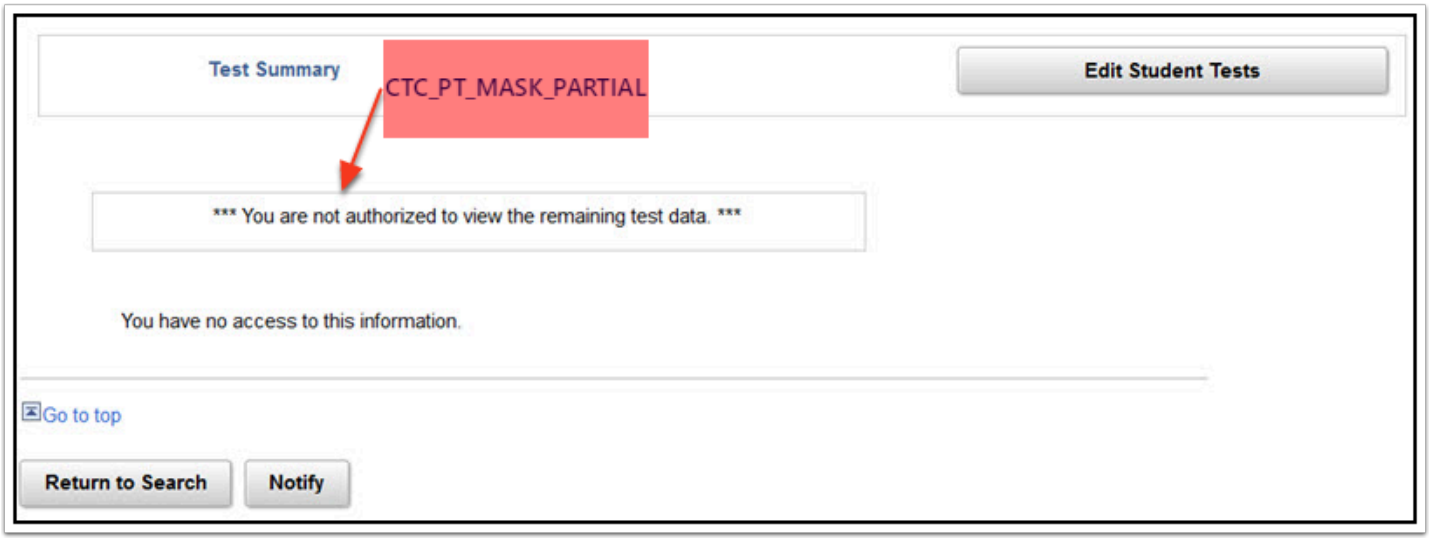
Admission Tab - Test Scores

Next we'll look at test scores on the Admission tab for each of our four advisors:




Test Summary
CTC_PT_MASK_SSN
*** You are not authorized to view the remaining test data. ***
You have no access to this information.
Go to top
Return to Search
Notify


Test Summary
CTC_PT_MASK_NONE
Test Results
1-2 of 2
View All
Test ID
Test Component
Test Score
Letter Score
Percentile
Test Date
Acad Level
Data Source
Date Loaded
ACPLC
NGREA
259.00
01/01/2020
Unknown
E
03/07/2020
ACPLC
REAC
81.00
03/01/2014
Unknown
E
03/07/2020
Go to top
Return to Search
Notify


Test Summary
CTC_PT_MASK_PARTIAL
Edit Student Tests
*** You are not authorized to view the remaining test data. ***
You have no access to this information.
Go to top
Return to Search
Notify

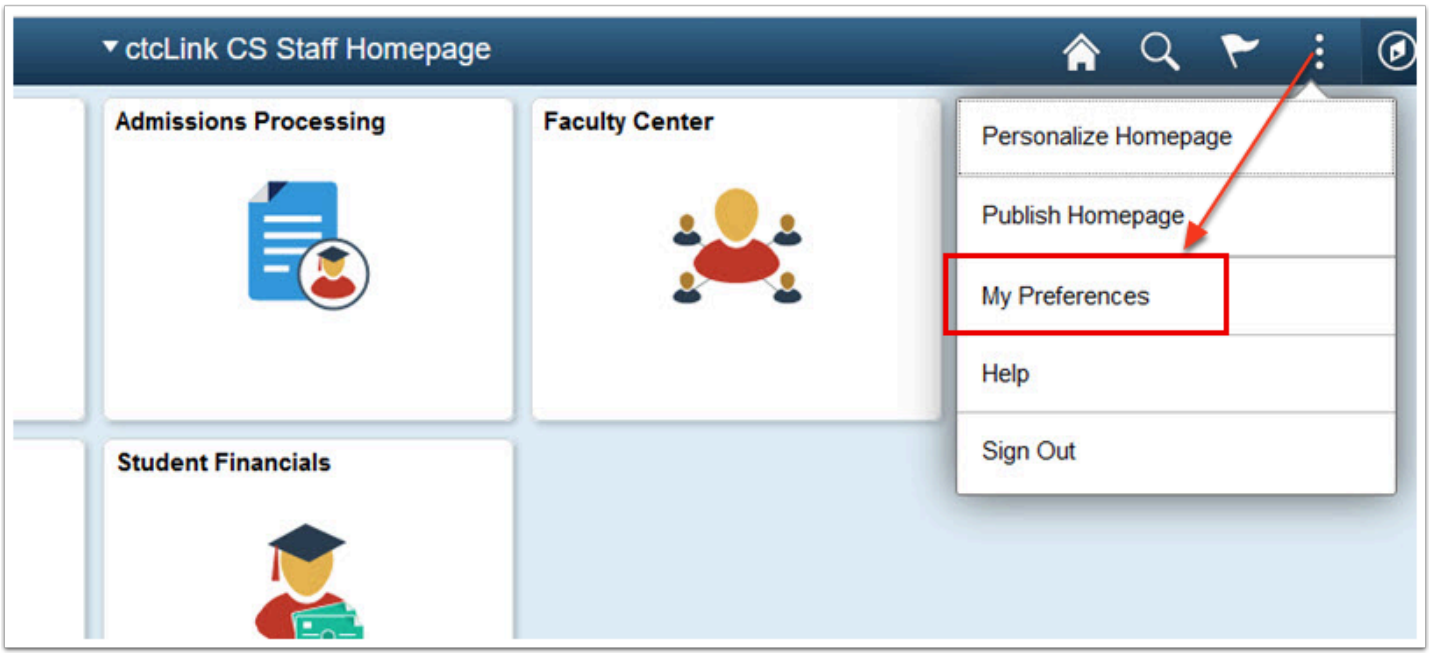
Controlling User Defaults from Within the Advisor Homepage

The PeopleSoft Fluid User Interface (Fluid) grants individuals the ability to customize many different aspects of PeopleSoft to aid in a more user-friendly and efficient system.

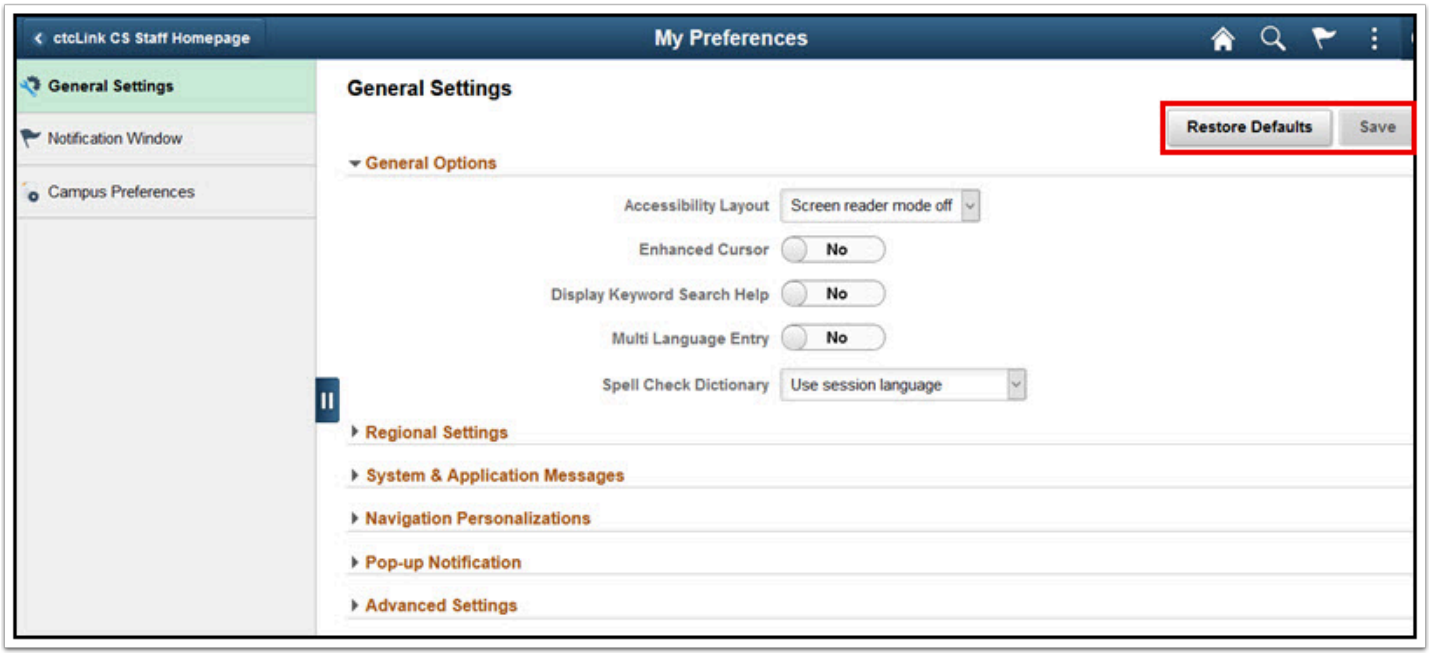
My Preferences

My Preferences allows the user to customize certain default settings about how PeopleSoft behaves, such as accessibility, language, calendars, and which elements are included when tabbing through a page.

My Preferences can be accessed via the **Action Menu** (vertical ellipsis) on the upper-right of the homepage, or via the **NavBar,** *if it's available to the user*.

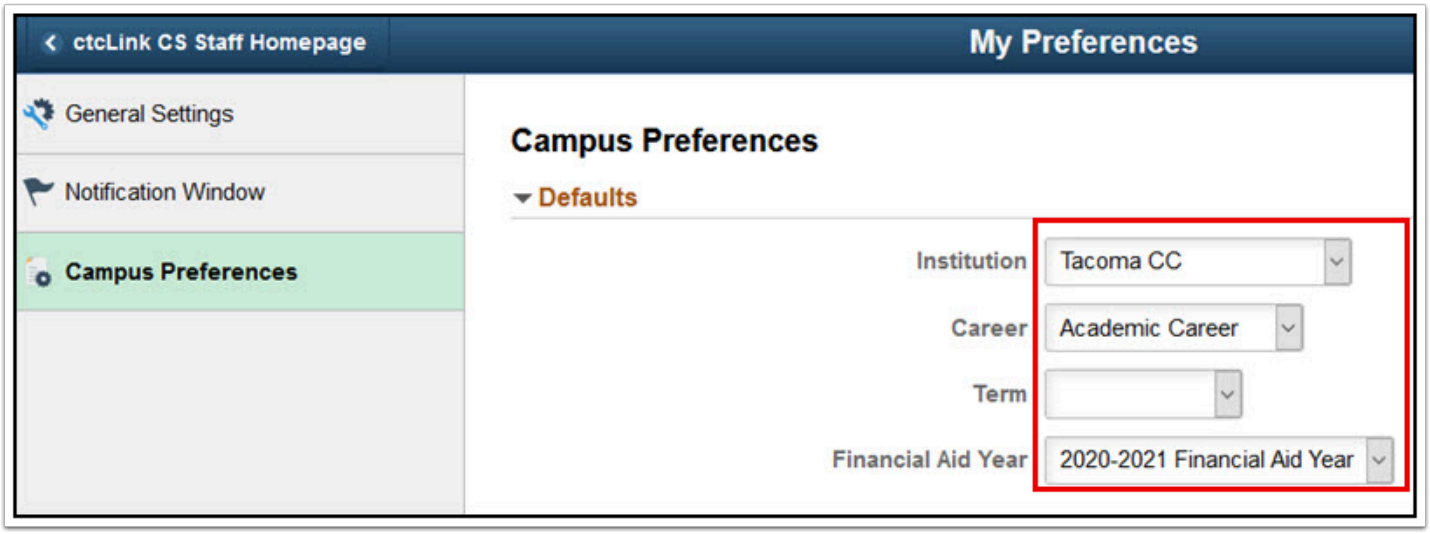


After the user has made any changes to My Preferences, she will need to click **Save** to retain her settings. If she wants to reset any changes she has made, she can click **Restore Defaults**.



Campus Preferences

Here is where users can set the Institution, Career and Term without having User Defaults page access and the additional NavBar access.



Audit Resources

- Auditing on the Instructor\Advisor tables was turned on 10/13/2023. Changes made on or after 10/14/2023 have been recorded.
- The audit record for the top part of the “Instructor/Advisor Table” tab can be accessed using the PS Query
  - QCS_SEC_INSTR_ADVR_TBL_AUDIT

- The audit record for the bottom part of the “Instructor/Advisor Table” tab can be accessed using the PS Query
  - QCS_SEC_INSTR_ADVR_ROLE_AUDIT
- The audit record for the “Approved Courses” tab can be accessed using the PS Query
  - QCS_SEC_INSTR_CRSE_AUDIT
- Because the role ZZ SS Advisor and ZZ SS Faculty are added dynamically, there is no entry in the Role\User audit table that corresponds to when those two roles are added or removed dynamically, so the queries above will tell you when the user would have been granted these roles dynamically. Manual edits to a user’s roles are stored in the Role\User audit table can be accessed using the query QXX_SEC_USER_ROLE_HISTORY.

Pages for Advisors Outside Advisor Homepage

Purpose: This section provides a list of pages outside of the Advisor Homepage that an advisor may need to access.

Audience: Local Security Administrators

Please click this Pages for Advisors Outside Advisor Homepage link to open the Quick Reference Guide in a new window.