

# HCM Security - Assigning Roles to Users

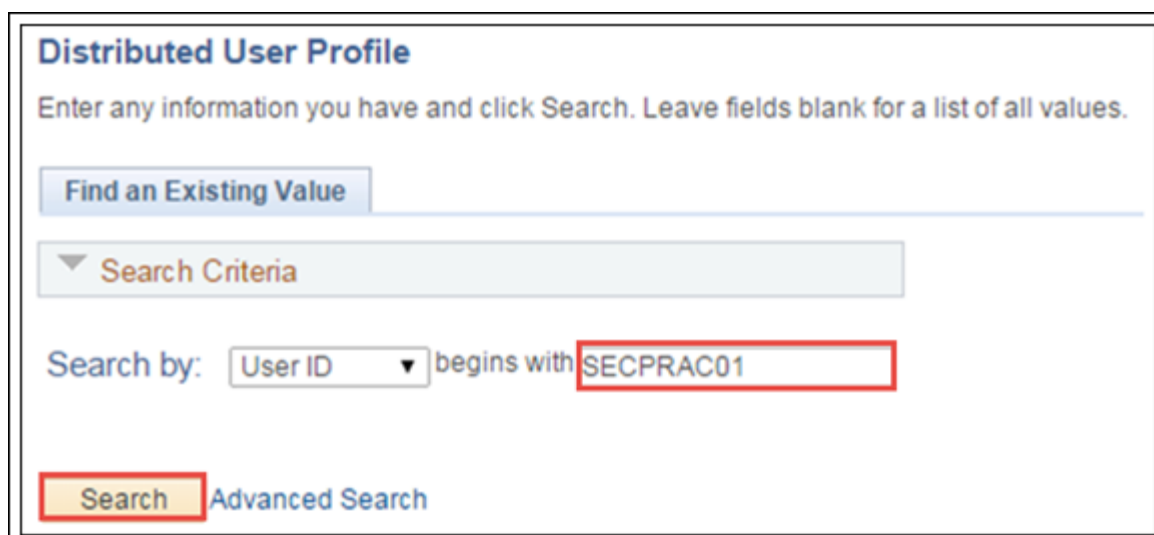
**Purpose:** Use this document as a reference for how to assign roles to users in ctcLink.

**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 the placeholder text 'Find an Existing Value'. Underneath the search bar is a 'Search Criteria' dropdown menu. The 'Search by:' field is set to 'User ID' with a dropdown arrow. To the right of 'Search by:' is the text 'begins with' followed by a text input field containing 'SECPRAC01'. At the bottom left, there is a red-bordered 'Search' button. To its right is a link for '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"/> |      | <a href="#">Route Control</a> |       |            | + -  |
| CTC_ADVISOR          | Advisor                        | <input type="checkbox"/> |      | <a href="#">Route Control</a> |       |            | + -  |
| CTC_BURSAR           | Bursar                         | <input type="checkbox"/> |      | <a href="#">Route Control</a> |       |            | + -  |
| CTC_CS_SUPER_USE     | CS Super User                  | <input type="checkbox"/> |      | <a href="#">Route Control</a> |       |            | + -  |
| CTC_CURRICULUM_C     | Curriculum Officer             | <input type="checkbox"/> |      | <a href="#">Route Control</a> |       |            | + -  |
| CTC_EARLY_ALERT_1    | Early Alert Reviewer 1         | <input type="checkbox"/> |      | <a href="#">Route Control</a> |       |            | + -  |
| CTC_EARLY_ALERT_2    | Early Alert Reviewer 2         | <input type="checkbox"/> |      | <a href="#">Route Control</a> |       |            | + -  |
| CTC_FA_DIRECTOR      | Fin. Aid Director              | <input type="checkbox"/> |      | <a href="#">Route Control</a> |       |            | + -  |
| CTC_FWL_HR_VIEWO     | FWL HR View Only               | <input type="checkbox"/> |      | <a href="#">Route Control</a> |       |            | + -  |
| <input type="text"/> |                                | <input type="checkbox"/> |      | <a href="#">Route Control</a> |       |            | + -  |

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.