SC.080.100 - Adding User Profiles

Purpose	• To create a User Profile • To add an email address to a User Profile • To add roles to a User Profile
Description	This topic demonstrates how to add a new User Profile. User Profiles define individual PeopleSoft users. After User Profiles are created, they are linked to one or more Roles. A User Profile must have at least one Role. The majority of permissions are granted by assigned Roles. Note: It is possible to have a User Profile with no Roles. This might be a user that isn't allowed access to the PeopleSoft application; however, you want them to have workflow generated email sent to them. All Users should be evaluated to determine whether or not they will be required to process Banner student payments. If they will need to add, maintain, or process payments for Banner students, then the "BOR_BU_XXXXB" Permission List should be selected as Primary. If a Campus Security Administrator has a Primary Permission List of BOR_BU_XXXXB (meaning that they are able to add, maintain, or process payments for Banner Students), then when they create a Non-Employee User profile, that Non-Employee User Profile will use the Primary Permission List for their campus of "BOR_BU_XXXXX." Once the Campus Security Administrator saves that Non-Employee User Profile, he/she will not able to see the User Profile under "Distributed User Profiles." The Security Administrator will need to change their own Primary Permission to "BOR_BU_XXXXX" to see the User Profile and make changes to it. If a Non-Employee needs to have the "BOR_BU_XXXXB" Primary Permission List, then the Campus Security Administrator will be able to see their User Profile under "Distributed User Profiles" without making any changes to their own Primary Permission List.

Security Role	**BOR_LOCAL_SEC_ADMIN**
Dependencies/ Constraints	None
Additional Information	None

Procedure

Below are step by step instructions on how to add User Profiles.

For this topic, imagine that you need to create a new User Profile for a contractor. This Business Process will also apply to a hire to your campus who is already employed at another USG GeorgiaFIRST institution. In addition, you need to setup their system e-mail addresses as well as assign their security roles. Let's see how this is done.

Step	Action
1.	Click the **NavBar** icon.
2.	Click the **Menu** icon.
3.	Click the **PeopleTools** link.
4.	Click the **Security** link.
5.	Click the **User Profiles** link.
6.	Click the **Distributed User Profiles** link. User Profiles can be added by clicking on the Add a New Value to create a new Profile or by using the Copy User Profile feature to duplicate a similar profile. The name of the new profile needs to be unique from the one that it was copied from. The User ID in this case is a Key Field. Tools version 8.4+ allows a naming length of up to 30 characters.
7.	Click the **Add a New Value** button.
8.	Enter a User ID in the **User ID** field. ***Note**: User IDs must be unique within the system. If a User ID is entered that already exists, the following message will display: "The User Profile/Operator ID already exists and is in use at another Institution. It cannot be deleted or copied over. Please select another unique User Profile/Operator ID."* *Additionally, User IDs cannot contain spaces or any of the following special characters:* *; : & , < > \ / " [ ] ( )*
9.	Click the **Add** button.
10.	Click the **Symbolic ID** list item and select the system default SYSADM1.
11.	Enter a password in the **New Password** field. Passwords must contain 2 digits and a minimum of 8 characters. When creating a new User Profile, it is recommended that the Password Expired? checkbox be selected, to enforce the user to change their password upon initial login.

Step	Action
12.	Enter the same password from above in the **Confirm Password** field.
13.	Select the **Password Expired?** checkbox. This must be selected so that Single Sign-on will work correctly.
14.	Click the **Edit Email Addresses** link.
15.	Select the **Primary Email Account** checkbox.
16.	Click the **Email Type** list item and select Business.
17.	Enter the user's email address in the **Email Address** field.
18.	Click **OK**.
19.	Click the **Add a new row at row 1 (Alt+7)** button.
20.	Click the **Home** list item.
21.	Enter "**contractor@home.com**" in the **Email Address** field.
22.	Click the **OK** button.
23.	The Process Profile permission list enables what features of Process Monitor operations the User will have. Enter "**PT_PR**" in the **Process Profile** field.
24.	Click the **Look up Process Profile (Alt+5)** button.
25.	Click an entry in the **Permission List** column.
26.	Enter "**BOR_BU_27**" in the **Primary** field.
27.	Click the **Look up Primary (Alt+5)** button.
28.	Click in the **Primary** field. Note that "BOR_BU_2700B" is available as an option for the Primary Permission List. All Users should be evaluated to determine whether or not they will be required to process Banner student payments. If they will need to add, maintain, or process payments for Banner students, then the "BOR_BU_XXXXB" Permission List should be selected as Primary.
29.	Click the **ID** tab.
30.	Click the **ID Type** list item. For end users that are employees, this will be set to Employee. After setting the ID Type to Employee, the Attribute fields will be activated. For end users that are not employees, this will be set to None.
31.	Enter "**Not an active employee**" in the **Description** field.
32.	Click the **User Roles** tab. The User Roles tab is where the functional and system roles are attached that are needed to complete the required business processes.

Step	Action
33.	Click the Look Up **Role Name** magnifying glass button. A list of roles will display. Roles will be categorized by business processes as defined by the functional end user team. The roles will enable each user to navigate to processes and reports according to these business process requirements. Each Profile will have one to many roles attached on this page. Some will be business functional roles and others will be system roles (i.e. Query, Report Manager). Once the appropriate roles are attached, click the save button and the user profile will be complete.
34.	Locate the appropriate role and click that entry in the **Role Name** column.
35.	To add additional roles, click the **+** button.
36.	When finished, click the **Save** button.