Users and Roles

So far, we have modeled process diagrams, associated GeneXus objects to the elements in diagrams and executed those processes. But we did all tests with the administrator user, which is the quick way to prototype each change we make.

If we want to include several participants in the testing stage we must define roles and users and assign users to the roles that will be executing each task.

In a process diagram, to manage access to tasks we must define specific roles that will be part of the model.

Those roles are defined at the KB level. To do that we must go to the window Preferences, Workflow, and double click on Roles.



We will see a window open up where we can enter the roles we want to add to the model. In this case, we will define two roles: a TravelAgencyEmployee role and a TravelAgencyManager role.



Once we have the roles defined we must assign, for each task, which roles are allowed to execute it.

To do that we go to the **FlightTicketReservation** diagram and select the **TicketReservation** task, and then click on its Roles property.

We will see that a dialog box opens up with the roles we defined previously, with the possibility of assigning them to the task.

Model Roles		Selected Roles
TravelAgencyManager		TravelAgencyEmployee
	Add >	
	Add All >>	
	< Remove	
	<< Remove All	

We select the **TravelAgencyEmployee** role and press **Add** because the employee is in charge of entering reservations. We do the same for the **Notify customer of authorization** task.

Now we go to the **ValidateReservation** diagram and repeat the operation while we assign the same **TravelAgencyEmployee** role to tasks **ContactAirlines**, **Add customer information required for travelling**, and **Check reservation documents**.

On the same **ValidateReservation** diagram we assign the **TravelAgencyManager** role to tasks **EvaluateCustomer** and **Authorize reservation** - **Customer Care Manager**, because only one manager user will be allowed to assess customers and authorize reservations.

Assign roles to task			×
Model Roles		Selected Roles	
TravelAgencyEmployee		TravelAgencyManager	
	Add >		
	Add All >>		
	< Remove		
	<< Remove All		
		OK Careal	
		UK Cancel	

In addition to defining roles for tasks, we can also define roles for processes determining which users may execute each process.

To define the roles allowed to execute the **FlightTicketReservation** process we go to the diagram and select the **None Start Event** symbol, and click on its Roles property.

We assign the **TravelAgencyEmployee** role so that only users with this role may initiate the reservation process. We then press OK.

Assign roles to task			×
Model Roles TravelAgencyManager	Add > Add All >> < Remove << Remove All	Selected Roles TravelAgencyEmployee	
		OK Cancel	

Once we have defined roles at the model level, we must define users and assign to them the roles in Gxflow client.

But prior to that we must impact the changes of definitions we made at the model level. To do so we go to Tools, Workflow, Deploy business processes, and then click on Add, select the **FlightTicketReservation** diagram and press Deploy.

E Deploy business processes ×	\sim
Deploy Business Processes	
Deploy Cancel Options	
Select All	
Add	
References	
Remove	
Clear	

We open a window in the browser and go to the Gxflow client's url. We log on with administrator user and go to the Administration Console, and then click on Roles.

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We can see that the roles **TravelAgencyEmployee** and **TravelAgencyManager** we created from GeneXus are impacted.

GX flow [™]			Workflow Administrator
	X	Palas	
 Process Manager 	~		
Document Manager	~	EDIT REMOVE DISPLAY MEMBERS NEW Q	
ର୍ସ୍ଟେ Event Viewer	~		
J Statistics	~	Name	Description
Dynamic Forms	~	GXflow Administrator	
🖬 Backend	~	GXflow Backend Administrator	
🗔 Management Console	~	GXflow Form Designer	
users		GXflow Manager	
roles		GXflow Manager Read Only	
org. unit definitions		GXflow Prototyper	
org.units		GXflow Security Administrator	
Server Settings	~	TravelAgencyEmployee	
License Manager	~	TravelAgencyManager	
		Q \$	< < > >

We also view other **special roles** that were already created.

These roles enable us to assign to users permits relative to processes and authorizations for executing administration tasks in Gxflow Client.

The **Administrator** role allows users to perform **all actions in all applications** of Gxflow client.

모 Desktop	~	Roles
Process Manager	~	
🛱 Document Manager	~	
वि Event Viewer	~	
🔟 Statistics	~	Name
Dynamic Forms	~	GXflow Administrator
🖬 Backend	~	GXflow Backend Administrator
🗔 Management Console	^	GXflow Form Designer
users		GXflow Manager
roles		GXflow Manager Read Only
org. unit definitions		GXflow Prototyper
org.units		GXflow Security Administrator
Bo Server Settings	~	TravelAgencyEmployee
		TravelAgencyManager

The **Manager** role allows user to access the Process Manager and carry out the actions related to process instances.

🖵 Desktop	~	Roles
Process Manager	~	
🛱 Document Manager	~	
ব্বি Event Viewer	~	
L Statistics	~	Name
Dynamic Forms	~	GXflow Administrator
🖬 Backend	~	GXflow Backend Administrator
🗔 Management Console	^	GXflow Form Designer
users		GXflow Manager
roles		GXflow Manager Read Only
org. unit definitions		GXflow Prototyper
org.units		GXflow Security Administrator
Server Settings	× I	TravelAgencyEmployee
		TravelAgencyManager

The **Manager Read Only** role can view the same as Manager but is not allowed to perform any actions.

The **Security Administrator** is allowed to view and work on the Management Console only.

모 Desktop	~	Roles
Process Manager	~	
Document Manager	~	
ব্রি Event Viewer	~	
J Statistics	~	Name
Dynamic Forms	~	GXflow Administrator
Backend	~	GXflow Backend Administrator
A Management Console	~	GXflow Form Designer
users		GXflow Manager
roles		GXflow Manager Read Only
org. unit definitions		GXflow Prototyper
org.units		GXflow Security Administrator
B Server Settings	~	TravelAgencyEmployee
		TravelAgencyManager

The **Prototyper** allows the execution of all tasks regardless of the role assigned to them and this facilitates the development work.

Let's now define users.

In the Administration Console we click on Users to open a screen for administrating the system's users. The only user defined so far is the administrator user which is created by default by the workflow engine.

sers			NEW	
£ &	Id	Name	Email	
	WFADMINISTRATOR	Workflow Administrator		
0 0				>

To create a new user we press New and enter its user: ASMITH, its name: ANA SMITH, and the email address, which is: <u>asmith@gmail.com</u>, and also its password: 123456.

New User		×
General		
User	ASMITH	
Name	ANNA SMITH	
Email	asmith@gmail.com	
Password		
R. Password		
User must change password at next logon	True False	

We confirm the password and will define that the password must be changed upon the first log on. We press OK and see that user Anna has been created, appearing in the users window.

		NEW	
Id	Name	Email	
ASMITH	ANNA SMITH	asmith@gmail.com	
WFADMINISTRATOR	Workflow Administrator		

Page

We will now create another user under the name of Peter Kent and fill out all the details..., using also 123456 as its password, followed by OK.

New User		×
General		
User	PKENT	
Name	PETER KENT	
Email	pkent@gmail.com	
Password	••••	
R. Password	••••	
User must change password at next logon	 True False 	
		վուլ

We now confirm that user PKENT has been created.

Id	Name	Email	
ASMITH	ANNA SMITH	asmith@gmail.com	
PKENT	PETER KENT	pkent@gmail.com	
WFADMINISTRATOR	Workflow Administrator		

We now go to the Roles application and assign the roles we defined for these users.

First we select the TravelAgencyEmployee role and press the Members button, and in the dialog box we select user Peter Kent and then press OK.

Roles			
EDIT REMOVE DISPLAY MEMBR	RS	NEW	
Name			cription
GXflow Administrator	Role Members		~
GXflow Backend Administrator	Users	Assigned Users	
GXflow Form Designer	Q.	Q.	
GXflow Manager	ANNA SMITH		
GXflow Manager Read Only	PETER KENT		
GXflow Prototyper	Workflow Administrator	ADD ALL BEMOVE	
GXflow Security Administrator		REMOVE ALL	
TravelAgencyEmployee			
			SAVE

We now select the TravelAgencyManager role and user Anna Smith and then press OK.

EDIT REMOVE	DISPLAY	NEW	
lame			Description
Role Members			
Users		Assigned Users	
Q		٩	
Name		Name	
ANNA SMITH			

With the users we have created we can log on to Gxflow client instead of doing it always with the administrator user.

To be able to do this we must first modify the Workflow execution mode, so we go back to Genexus.