

Appian Step-by-Step #3

Exercise to Accompany
Manage Users and Groups

The Appian Step-by-Step series consists of 13 exercises that accompany the courses in the Appian Developer learning path. Exercises build upon each other. Complete exercises in order and keep the app and all objects until you are done with the project.

- 1** Welcome to the Appian Developer Learning Path
- 2** Create an Application
- 3** **Manage Users and Groups**
- 4** Expressions
- 5** Records Part 1: Accessing Your Data
- 6** Records Part 2: Record Type Relationships
- 7** Sites
- 8** Query Your Data
- 9** Interfaces
- 10** Process Modeling 101: Part 1
- 11** Process Modeling 101: Part 2
- 12** Reports
- 13** Task Report

Exercise 3: Manage Users and Groups	3
Manage Users	3
Create Groups	3
Configure Group Security	4
Configure Folder Security	4
Configure Application Security	5

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Exercise 3: Manage Users and Groups

Manage Users

When you signed up for the Appian Community Edition (ACE) environment and launched your site, a user with your credentials was created for you. For this exercise, you will not need to create additional users. As you build your application, add and remove your user to the different groups to test the security of your application features.

Learn more about creating and managing users by visiting [Appian Documentation](#).

Create Groups

In this exercise, you will create the groups for your application: AX All Users, AX Administrators, AX Supervisors, AX Registrars, and AX Mechanics. Groups are important because they are used to set security to the application and its objects. The presence of All Users and Administrators groups is standard and considered a best practice in most apps. The All Users group includes all users with access to the app, and it is always the parent group for all other groups in an application. The Administrators group includes all users administering the app and its objects. The AX Supervisors and AX Registrars groups include business users who will be accessing the app to complete their work. These groups will help you define the access to specific app features for your business users.

As you create groups and other objects, remember to use the app prefix in all names. This will become helpful in scenarios where you have to discern between similar objects from different apps. Follow the steps below to create the groups.






1. In your application, click **New** and select **Group** from the dropdown menu.
2. In the dialog box, name the group as **AX All Users**, and add a description: "Parent group for all roles in the AX application."
3. Leave the Parent Group and Group Members fields empty since this group does not have a parent or group members yet. Change the Visibility to **Public**, and click **Create**.
4. You will be prompted to review group security. Wait on the security review and setup until you create the AX Administrator group. Click **Save**.
5. Once the AX All Users group is created, click the group name to access it.
6. From within **AX All Users**, follow the steps above to create the remaining groups: **AX Administrators**, **AX Supervisors**, **AX Mechanics**, and **AX Registrars**. Add the **AX All Users** group as their parent group. Do not set security for these groups. You will secure them using their parent group, AX All Users.
7. Add yourself to **AX Administrators**, **AX Supervisors**, **AX Mechanics**, and **AX Registrars**. You can add a user by drilling into each target group and clicking **Add Members**. This way, you will be able to see the features designed for specific users.

You can also remove yourself from a group to test the security of these features.

Configure Group Security

After you have the two main app groups AX All Users and AX Administrators, you can start securing all application objects. This is what we call object-based security in Appian. You will start by securing groups first. To do so, you will secure the AX All Users parent group. All other groups will inherit security settings from its parent. Follow the steps below to set group security.

1. Check the box next to **AX All Users**, and select **Security** from the menu options.

NEW ▾	ADD EXISTING ▾	DUPLICATE	ADD TO PACKAGE	SECURITY	DEPENDENTS	PRECEDENTS	REMOVE FROM APP	DELETE	MORE ▾	↺
<input type="checkbox"/>		Name	Description							
<input type="checkbox"/>		AS Mechanics	Group for all Mechanics in the AS application.							
<input checked="" type="checkbox"/>		AS All Users	Parent group for all roles in the AS application.							
<input type="checkbox"/>		AS Registrars	Group for all Registrars in the AS application.							
<input type="checkbox"/>		AS Supervisors	Group for all Supervisors for the AS application.							
<input type="checkbox"/>		AS Administrators	Group for all administrators in the AS application.							

2. In the dialog box, click **Add Users or Groups**. Start typing **AX Administrators** in the User or Group field, and then select this group from the list of suggestions. In the **Permission Level** field, retain **Administrator**. Click **Save Changes**.

Now that we set security to the AX All Users group, all other child groups inherit this security setting. This is what we call security inheritance in Appian.

Configure Folder Security

In Exercise 2, you created parent folders for your application objects. Now that you have your application groups, you are able to configure folder security. Documents or rules contained in a parent folder can automatically inherit user rights from the parent folder. Process Model folders do not provide security inheritance. Follow the steps below to add security settings to your parent folders.

1. Select **Folder** from the **Object Type** filter on the left side of Appian Designer.
2. Check the box next to **AX Rules & Constants**, and click **Security**.
3. Click **Add Users or Groups**.
4. In the **User or Group** column, type and select **AX Administrators**. Set the permission level to **Administrator**.
5. Click **Add Users or Groups**, and add **AX All Users**. Set the permission level to **Viewer**. Click **Save Changes**.
6. Repeat this process for **AX Process Models**.

7. For the **AX Knowledge Center**, select **AX Administrators**, and set the permission level to **Administrator**. Then, select **AX All Users**, and set the permission level to **Editor**. The Editor permission level allows users to upload, modify, and delete documents. Viewers are able to view documents, but not upload.

Configure Application Security

Now that you have the groups, you will set security to the whole AX app. From now on, you should also set security on all objects that you create. Follow the steps below to set security to your application.

1. In **Appian Designer**, select the checkbox next to **Acme Exercise (AX)**, and click **Security**.
2. In the **Application Security** dialog box, click **Add Users and Groups**, and type **AX Administrators** in the **User or Group** field. Select the **Administrator** permission level.
3. Click **Add Users or Groups** again. In the **User or Group** field, type **AX All Users**, and keep the default **Viewer** permission level.
4. Click **Save Changes**.