

# ***Unit 3: Creating Users and Configuring Access***

## ***Policies***

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This unit provides you with an overview of the prerequisite information that is required for creating users. It also discusses how to create users and configure access policies for users in Sterling Selling and Fulfillment Foundation.

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## LESSON 3.1: Prerequisites for User Creation

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### Introduction

This lesson provides you with an overview of the prerequisite information that is required for creating users in Sterling Selling and Fulfillment Foundation.

### Lesson Objectives

This lesson is designed to enable you to:

- Describe users.
- Explain user attributes.
- Configure a user group.
- Configure a team.
- Configure a queue.

### References

For more information on prerequisites for user creation, refer:

- [http://www.ibm.com/support/knowledgecenter/SS6PEW\\_9.5.0/com.ibm.help.org.partic.concepts.doc/productconcepts/c\\_Considerations\\_OrgAndParticModel.html](http://www.ibm.com/support/knowledgecenter/SS6PEW_9.5.0/com.ibm.help.org.partic.concepts.doc/productconcepts/c_Considerations_OrgAndParticModel.html)

Navigate to **Sterling Order Management 9.5.0 > Configuring shared components and users > Organization and participant modeling > Considerations**

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## Users Overview

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### Overview

A user refers to any person who has authorized access to Sterling Selling and Fulfillment Foundation. Users are assigned certain roles, such as Hub administrator or Customer Service Representative (CSR), depending on the role they play in the organization.

### User Authentication Methods

User Authentication relates to the methods used to establish the identity of a user who is logging on to the system. In Sterling Selling and Fulfillment Foundation, User Authentication can be performed in the following ways:

User Authentication Methods	Description
Desktop Login	Desktop login is typically used by Node users, where the Node is set up in a different network from that of the Enterprise.
Single Sign-On	Organizations that use multiple applications to manage their supply chain network use Single Sign-On. Single Sign-On (SSO) lets a user login once to a PC or network and access multiple applications and systems without having to re-establish the identity of the person.
Third Party Authentication	Organizations having many users and systems typically use Third Party Authentication. By using Third Party Authentication methods, the systems administrator can centrally define users and assign users to multiple systems.

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## Users Overview

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### Types of Users

Depending on the organization they belong to, users can be classified into five types. The five user types are listed in the following table, with a brief description of each.

Type of User	Description
Hub User	Hub users belong to the DEFAULT Organization. By default, they have access to data for all Enterprises. In addition, Hub users and enterprise users are given access to the Applications Manager.
Enterprise User	Enterprise users maintain an Enterprise. By default, they have access to all data for the Enterprise they belong to, and any child enterprises. Enterprise users, along with Hub users, are given access to the Applications Manager.
Buyer and Seller User	buyer and seller users belong to buyer and seller organizations. They have access to data in which their organization plays the role of buyer or seller.
Node User	Node Users, as the name suggests, are associated with a particular Node. They have access to data in which they are the associated Node. For example, a Node User can view all order releases in which they are the ship node or receiving node on the order release.
Carrier User	Carrier users are associated with a particular carrier. They have access to data in which they are the associated carrier. For example, a carrier organization user can view all orders in which they are the carrier shipping the order.

## User Attributes Overview

### Locales

Locales are a set of parameters such as a user's country, time zone, date, and time formats. For business transactions, a Locale defines a set of standards that allow people within a geographical area to communicate and conduct business transactions in an unambiguous manner.

You can configure location-specific information for users by selecting an existing Locale or creating a Locale. However, Locales are only established by a Hub. You can setup Locales and associate them with multiple organizations and users within the Hub. Specifying the Locale for a user is mandatory in Sterling Selling and Fulfillment Foundation. For example, a user who is configured for the Eastern Time Zone but logs in from a location in the Pacific Time Zone, sees Locale-specific information as if they were in the Eastern Time Zone.

### Locale Details Layout

The following figure is of the Locale Details screen and shows the different parameters that you can specify when creating a Locale in a Hub organization. The parameters include: Locale Code, Description, Country, Time Zone, Language, Currency, and Date and Time Formats.

**Locale Details ( DEFAULT )**

Locale Code:  Locale Description:  Country/Region:

Variant:  Language:  Currency:

Dimension UOM:  Volume UOM:  Weight UOM:

Time Zone: 

**Date and Time Formats**

Date Time Format:  Date Format:  Month Display Date Format:

Day Display Date Format:  Time Format:  Hour/Minute Time Format:

Date/Hour/Minute Format:  Client Time Format:  Client Date Time Format:

### Department Code

A Department Code is an alpha-numeric code that uniquely identifies a department in an organization. When creating a user for an organization, only the departments available with that organization are listed. You can select a Department Code to assign the user to that department.

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## User Attributes Overview

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### Menu Groups

A Menu Group defines the menu structure (or screen structure) that is shown to a user in Sterling Selling and Fulfillment Foundation.

All menus can be grouped into Menu Groups. The default Menu Group contains the standard menu configuration of the Application Console. The default Menu Group is linked to the default administrator user. When creating new users, you can reuse the default Menu Group or create a Menu Group.



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#### Note

Some of the Menu Groups that are provided Out-Of-The-Box are Default Menu, SMA\_Admin\_Menu, SOP\_MENU, SOP\_PCA\_CONSOLE\_MENU, and Supplier Portal User Menu.

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### Themes

In Sterling Selling and Fulfillment Foundation, a Theme relates to the color scheme of the Application Console and the Applications Manager that is shown to users. You can set the Theme for a user while creating a user or modifying existing users. Users can select a different theme when they log in to Sterling Selling and Fulfillment Foundation. They can set the theme by using options that are provided on the Application Console. However, such themes are not permanent and the user's default theme is applied the next time that the user logs in.

#### **Preconfigured Themes**

The preconfigured themes that are provided are listed as follows:

- Ice
- Earth
- Jade
- Sapphire

You can also define Labels that identify Themes. All Themes that are used by Sterling Selling and Fulfillment Foundation are defined centrally through CSS and XML files.

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## Configure User Groups

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### Overview

User groups refer to a collection of users who perform a similar task. For example, Customer Service Representatives can be grouped together into a Customer Service Representative user group.

An organization can create its own user groups to organize its users. User groups can contain only users for the same organization that the user was created for, except in the case of a user group created by the Hub, which can contain users of any organization.

### **Users in Multiple User Groups**

A user can belong to multiple user groups. Each user group has permissions that are assigned to it. Users who belong to multiple user groups retain the least restrictive set of permissions that are defined by the groups they belong to.

For example, if a user belongs to a user group that allows access to only the Application Console, and this user also belongs to a user group that allows access to the Application Console and Applications Manager, the user can access both applications.

### **User Group Related Tasks**

Sterling Selling and Fulfillment Foundation helps you perform the following tasks that are related to user groups:

- Create and Modify User Groups
- Delete User Groups
- Administer User Group Permissions
- Set Inner Panels as Read-Only
- Setup Permissions for Interoperability Servlet
- Setup Permissions for APIs
- View users that are subscribed to a User Group
- Setup Printer Preferences for a User Group

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## Configure User Groups

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### User Groups Creation

In addition to the user groups provided, you can create new user groups. It is also allowed to set and modify the permissions, subscriptions, and printer preferences for a user group.

#### Create New Group Screen Layout

The following figure shows the Information fields in the Group Details screen.

The key details are as follows:

- **Group ID and Name:** Identification code and name for the group.
- **Group Type:** The two options are external and Internal. An external group type is one that involves web use while an Internal Group Type does not involve web use. For example, a CSR user group can be assigned an external group type as they use the web for transactions.

### User Group Permissions

You can set access permissions for a user group by using the Permissions tab. User group permissions determine the modules, screens, and functions that the user group has access. The option to set the permissions is activated only after the user details are saved. When you set permissions for a user group, the permissions are applied to all users who are part of that user group.

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## Configure User Groups

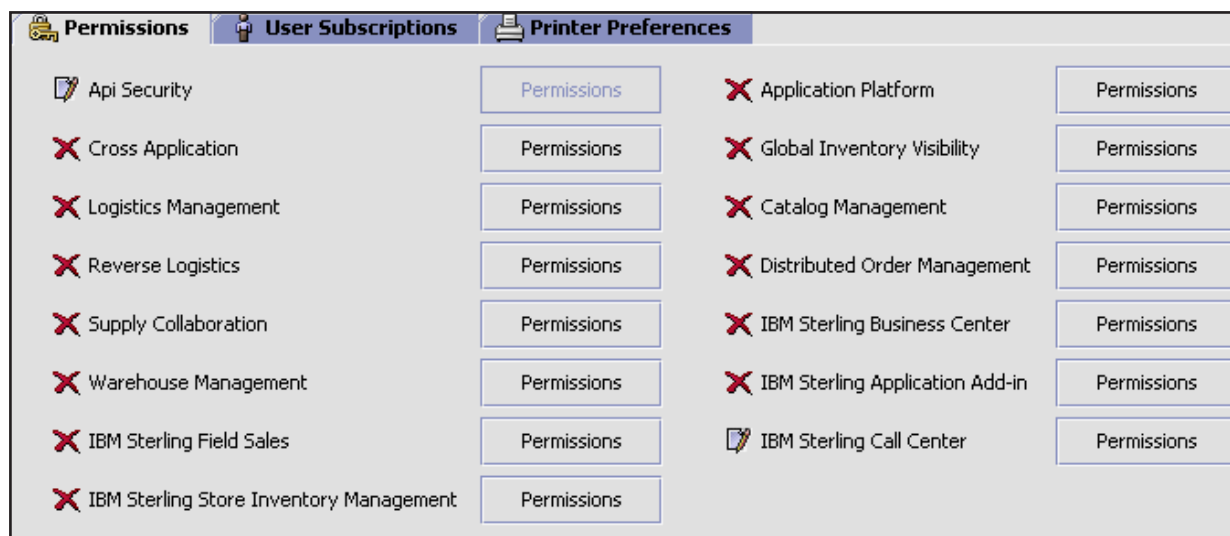
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### User Group Permissions

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#### User Group Permissions Tab Screen Layout

The following figure indicates the user groups and Permissions tab.



In the Permissions tab, you can set the permissions for the following:

- Set permissions to specific entities and tasks of the different modules.
- Set permissions to a set of APIs and services.

Click the Permissions button to view the Permission tree of entities within the module.



#### Note

A user has access to a functionality only if the permissions have been granted for the entity in the module as well the specific API. For example, a user has access through the UI to a screen that lists users. The screen invokes the getUserList API. In order for the screen to work for that user, they must have access to the getUserList API also.

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## Configure User Groups

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### Set Permissions

Double-click the module name to view and access the functions within a module. You can allow or disallow permissions for an entire module or on a screen-by-screen or function-by-function basis.

The following figure indicates the permissions tree for a module.



The key options available to set permission are as follows:

- Grant Permission
- Revoke Permission
- **Set Read Only permissions:** This option is available only for the inner panels. This option ensures that a user group cannot modify or update any of the data visible to them. When an inner panel is marked as read-only, all the controls and its values in the page are visible but are disabled. For example, the Category Details entity under Application Platform, has three Inner Panels: Category Details, Sub Categories, and Category Items. You can right-click any of these inner panels and set or unset them as read-only.
- **List users:** You must select this option to view the list of users who have permission to access an entity.



Note

If you want to revoke permissions to a particular menu for a given user group, you need to revoke all of the permissions for screens that can be selected under the menu option for which you are revoking permissions. For example, if you uncheck the System Management Console, and all of its associated screens and functions, users do not see the System Management Console menu option in the Application Console.

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## Configure User Groups

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### User Subscriptions

You can configure the list of users who are subscribed to a user group by using the User Subscription tab. The options are provided to add a user to the group and remove the user.

The following figure shows the User Subscriptions Screen.



### User Printer Preferences

A Printer that is associated with a user group can be used by all users who are part of that user group. Select a Printer ID to be associated with the user group on the Print Preferences screen. For example, to add a laser jet printer (with Printer ID LJ235) to the CSR user group, you must navigate to the Printer Preferences tab under the CSR user group and select LJ235 from the Printer ID drop-down list.

Printers can also be associated with specific users. However, it is preferred that User Printer Preferences be configured at the group level for easier administration.

The following figure shows the Printer Preferences tab.



## Configure Teams

### Overview

A team is a collection of users who have common data access requirements. A team can be assigned access to specific document types, Enterprises, ship nodes, and Customers. For example, a set of Customer Service Representatives who manage a specific customer account can be assigned to a team. The organizations that can configure teams are:

- Hub
- Enterprise
- Nodes belonging to Hub or an Enterprise.

The association of a user to the team is optional. If a user is not associated with a team, that user is considered to have the least restrictive, or default access.

### Team Details Screen Layout

The following figure shows the Information fields in the Team Details screen.



The key details are as follows:

- Team ID: Name for the team.
- Parent Team ID: This field helps you to specify the parent team for the team you are creating. If the team you are creating is part of a multi-level hierarchical team structure, the parent team ID must be the name of the team that is in the next higher level within the structure.



#### Note

If the data access policy is defined for the installation, the data access policy determines whether the team permissions configured are applied to the user.




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## Configure Teams

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### Enterprise Access Permissions

The enterprises to which the users of the team have access must be configured. The following three options are provided to configure the access permissions.

- **Default Enterprise Access:** The Default Enterprise Access option restricts access to the users of the team to the enterprises belonging to the enterprise access list as per the organization hierarchy. For example, Hub users have access to all enterprises, and enterprise users have access to all child enterprises of their enterprise. This option is the default option for users that are configured for an enterprise.
- **Inherited Enterprise Access:** The Inherited Enterprise Access option restricts users of a team to view only the enterprises that are based on the access configuration for the parent team. For example, if a team, India Sales, has a parent team, Asia Pacific Sales, and if the Inherited Enterprise Access option is activated, then India Sales inherits the enterprise access defined for Asia Pacific Sales.
- **Restrict Access To A Specific List Of Enterprises:** The Restrict Access To A Specific List Of Enterprises option restricts users by allowing them to access only a specific list of enterprises. You can add or delete enterprises to the list by using  and  icons. For example, to restrict users of a team such that they can access only the enterprise NCD, you must click  and then select NCD from the resulting list of enterprises. The Restricted List always includes the Primary Enterprise of the Organization you are configuring the team for

### Enterprise Access Tab

The following figure shows the Enterprise Access tab.



Enterprise Access	Document Type Access	Ship Node Access
<input checked="" type="radio"/> Default Enterprise Access	<input type="radio"/> Inherited Enterprise Access	<input type="radio"/> Restrict Access To A Specific List Of Enterprises

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## Configure Teams

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### Document Type Access Permissions

You can configure the list of document types to which the users of the team have Access permissions. The options are explained below.

- **Default Document Type Access:** A default access list is based on the document types associated with a particular business application. The Default Document Type Access option allows a team to only view the document types belonging to the default access list.
- **Inherited Document Type Access:** The Inherited Document Type Access option restricts the users of a team by allowing them to view only the document types based on the access configuration for the parent team.
- **Restrict Access To A Specific List Of Document Types:** This option specifically determines the document types the team has access to. You can select an application and the accessible documents within that application by using the Application drop-down list.

### Document Type Access Tab Screen Layout

The following figure shows the Document Type Access tab.

Document Type	Description	Accessible
0004	Template Order	<input type="checkbox"/>
0006	Transfer Order	<input type="checkbox"/>

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## Configure Teams

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### Team Access Configuration Illustration

#### Scenario

An organization has a sales team who are involved only in the creation of Sales Order. This team has access only to the Enterprise Matrix. A team, Store-CSR, is created, with access to documents and enterprise as specified. The team configuration is described in the following paragraph.

#### Team Configuration

A team Store-CSR Customer Service Representatives has been created with the following configuration in the Sterling Selling and Fulfillment foundation.

- **Document Access:** The access is set only to the Sales Order documents under Distributed Order Management as shown in the following figure.

Document Type	Description	Accessible
0004	Template Order	<input type="checkbox"/>
0006	Transfer Order	<input type="checkbox"/>
0001	Sales Order	<input checked="" type="checkbox"/>

- **Enterprise Access:** The Enterprise Access is set to Matrix as shown in the following figure.

Enterprise Code	Enterprise Name
Matrix	Matrix, Incorporated

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## Configure Teams

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### Team Access Configuration Illustration

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#### User Creation

A user, Mike, has been created and is assigned to the team Store-CSR. The required user group permissions have been set for the user.

The screenshot shows the 'User Details (DEFAULT)' window. At the top, there are fields for 'User ID' (Mike Jones), 'User Name' (mjones), and 'Password' (masked with dots). Below this is a tabbed interface with three tabs: 'Primary Info' (selected), 'Queue Subscription', and 'Printer Preferences'. Under the 'Primary Info' tab, there are several fields: 'Theme' (dropdown), 'Locale' (dropdown), 'Department Code' (dropdown), 'Team' (dropdown, showing 'Store Customer S...'), 'Password Policy' (dropdown), 'Menu Group' (dropdown), 'Active' (checked checkbox), 'Is Supervisor' (unchecked checkbox), 'Primary User Group' (dropdown), and 'Max Customer Assignments' (text field).

#### Create Order in Application Console

The following figure indicates the Create Order screen as accessed by the user Mike. You can see that only the Sales Order document is available to the user. Also, only the enterprise Matrix, can be accessed by him.

The screenshot shows the 'Order Entry' screen. At the top, there is a navigation bar with tabs: 'Alerts', 'Order', 'Logistics', 'Reverse Logistics', and 'Business Inte'. Below the navigation bar, there is a section titled 'Header Details'. In this section, the 'Document Type' is set to 'Sales Order' (highlighted with a red box). The 'Enterprise' dropdown is also highlighted with a red box, and the 'Matrix' option is selected. Other fields visible include 'Buyer', 'Order #', 'Seller', and 'Order Type'.

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## Configure Teams

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### Ship Node Access Permissions

You can configure the list of ship nodes to which the users of the team have Access permissions. You can choose to set the access to all the ship nodes, User's Nodes, Nodes accessible to the team creator or select a specific set of ship nodes to which the users can have access. These options are explained below.

#### Ship Node Access Tab Layout

The following figure below shows a Ship Node Access tab.

All Available Nodes	
Node	Node Description
HeavyLiftWH1	Columbus Warehouse
HeavyLiftWH2	Bolivar Warehouse
HeavyLiftWH3	Edmonds Warehouse
LowellNode	Lowell Node
Matrix_S1	Matrix Model Store with NO...
Matrix_S10	Matrix Store 10

Selected Nodes	
Node	Node Description

- **All Nodes:** Allow the users of the team to access all the ship nodes. This option is not available for an Organization whose role is specified as Node. This option is the default option for users configured for an Enterprise.
- **User's Node:** The User's Node option helps a team to access the Nodes to which the Node user belong to. This option is the default option for a user belonging to the node organization. If the user is an enterprise user, selecting this option allows the team to access all the Nodes whose parent organization is the user's Enterprise, an Enterprise that is hierarchically lower than the user's Enterprise, or both.
- **Restrict Access To Specific Nodes:** Restricts a team's access to specific list of Nodes selected.
- **Nodes Accessible To Team Creator:** Allows a team to access all the Nodes that are accessible to the creator of the team.

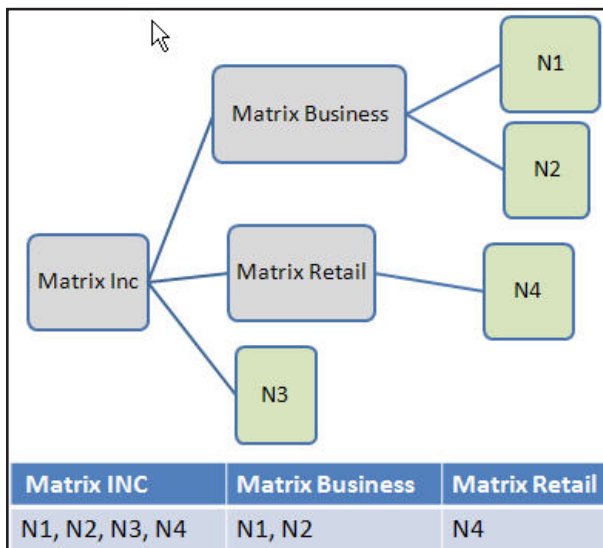
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## Configure Teams

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### Ship Node Access Illustration

Matrix, Matrix Business and Matrix Retail are Enterprises. The hierarchy of the Nodes and the Enterprises is as shown in the following figure. Separate teams are created in each of the organizations. The ship node access permission is set to the User's Node for each of the team. Users have been assigned to each team.



- Users of Enterprise Matrix Inc have access to nodes N1 through N4 because the parent organization of these nodes are either the user's enterprise or an enterprise that is hierarchically lower than the user's enterprise.
- Users of Enterprise Matrix Business have access to nodes N1 and N2.
- Users of Enterprise Matrix Retail have access to nodes N4.
- Node Users have access to only their own organizations.

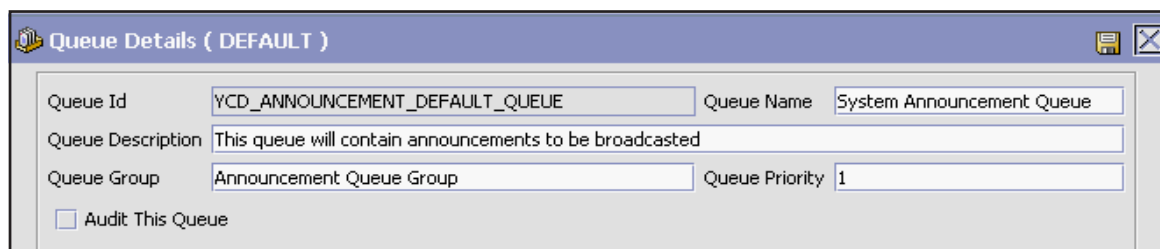
## Configure Queues

### Overview

In the Sterling Selling and Fulfillment Foundation, the alerts are raised in different formats including e-mail and faxes. When an alert is raised, it is routed to a Queue. The Queue is configured to distribute and notify specified users, group of users or Departments of alerts at specified levels and times. Queue Management helps the configuration of queues to notify users when alerts are raised by the system. Additionally, the escalation actions and the criteria for escalation are also defined. The Queue Alerts appear as scrolling banners in the appropriate Order Capture Channel.

### Queue Configuration

You can configure Primary Information for Queues in the Queue Details screen. The following figure shows the Information fields in the Queue Details screen.



The screenshot shows a window titled "Queue Details ( DEFAULT )". Inside, there are several input fields: "Queue Id" with the value "YCD\_ANNOUNCEMENT\_DEFAULT\_QUEUE", "Queue Name" with "System Announcement Queue", "Queue Description" with "This queue will contain announcements to be broadcasted", "Queue Group" with "Announcement Queue Group", and "Queue Priority" with "1". There is also an unchecked checkbox labeled "Audit This Queue".

The key details are specified as follows:

- Queue ID: This field allows you to enter a unique ID for the queue.
- Queue Name: This field is a short description of the queue.
- Queue Group: The queue is a part of queue group.
- Queue Priority: This field allows you to enter a numerical priority for the queue with 1 being the highest and 0 being no priority. This field is used to identify the importance of the queue in the business environment.
- Audit This Queue: You must select this field if you want to audit the alerts that are coming into the queue.



An alert queue is set up to distribute the alerts to the user. You can assign users or departments to alert queues and control the alert types that are received by them. Only those alert queues which are configured on the department's organization can be set.

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## Configure Queues

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### Size Based Escalation

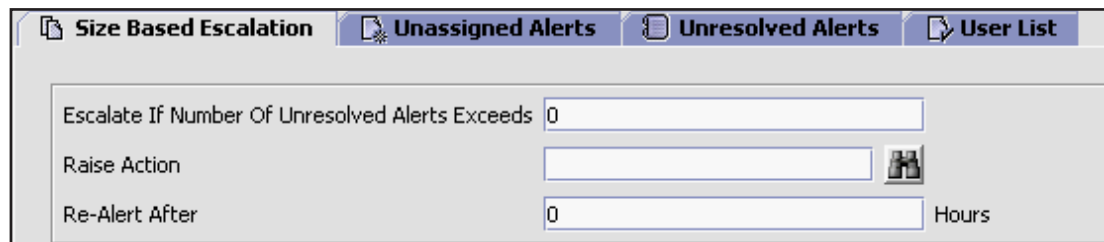
The size-based escalation parameters specify the queue management when the number of unresolved alerts to the queue exceed a specified value. This value is called Size Based Escalation. The following options are provided to resolve this situation.

1. Escalate to another queue after a specified number of unresolved alerts are logged. The alert is moved to a more high priority queue.
2. Raise an action after a specified number of unresolved alerts are logged.
3. Generate a Re-Alert after a specified number of hours.

For example, an alert is raised every time a customer login fails. This alert is routed to the Password Authentication Queue which has a size-based escalation of 5. If the number of attempts at login crosses five, the unresolved alert is routed to the Password Reset queue.

#### Size Based Escalation Tab Screen Layout

The following figure shows the Size Based Escalation tab.



The screenshot shows a software interface with four tabs: "Size Based Escalation", "Unassigned Alerts", "Unresolved Alerts", and "User List". The "Size Based Escalation" tab is active. It contains three input fields: "Escalate If Number Of Unresolved Alerts Exceeds" with a value of 0, "Raise Action" with an empty field and a small icon to its right, and "Re-Alert After" with a value of 0 and the unit "Hours" to its right.

A queue can also be assigned to a specific department instead of a single user.

Remember that an action is a process or program that an event triggers. These processes and programs send alert notifications and automatically resolve issues.

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## Configure Queues

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### Escalation of Unassigned Alerts

If the alerts to the queue have not been assigned to any user, the next escalation steps can be defined. The following options are provided to resolve the unassigned alert.

1. Escalate an unassigned alert to another queue after a specified number of hours. The alert is moved to a more high priority queue.
2. Raise an action after a specified number of hours.
3. Generate a re-alert after a specified number of hours.

### Unassigned Alerts Tab Screen Layout

The following figure shows the Unassigned Alerts tab.

The screenshot shows a configuration window with four tabs: "Size Based Escalation", "Unassigned Alerts", "Unresolved Alerts", and "User List". The "Unassigned Alerts" tab is selected. It contains four configuration rows:

Configuration Item	Value	Unit
Escalate Alert After	0	Hours
Move Alert To Different Queue	[Dropdown menu]	
Raise Action	[Text field]	
Re-Alert After	0	Hours

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## Configure Queues

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### Escalation of Unresolved Alerts

If the alerts to the queue have not been resolved, the next escalation steps can be defined. The following options are provided to resolve the unresolved alert.

1. Escalate an unresolved alert to another queue after a specified number of hours. The alert is moved to a more high priority queue.
2. Raise an action after a specified number of hours.
3. Generate a realert after a specified number of hours.

The following figure shows the Unresolved Alerts tab.

The screenshot shows a configuration window with four tabs: "Size Based Escalation", "Unassigned Alerts", "Unresolved Alerts" (which is selected), and "User List". The "Unresolved Alerts" tab contains four configuration fields:

- Escalate Alert After:** A text input field containing the value "0", followed by the label "Hours".
- Move Alert To Different Queue:** A dropdown menu with a downward arrow, followed by a small icon of a folder with a green arrow.
- Raise Action:** A text input field, followed by a small icon of a document with a green arrow.
- Re-Alert After:** A text input field containing the value "0", followed by the label "Hours".

### Subscribe Users to Queues

You can view the users that are Subscribed to an Alert Queue and modify their subscription details by using the User List tab. You can also delete a user from the subscribed users list.

The following figure shows the User List tab.

The screenshot shows the same configuration window with the "User List" tab selected. The tab is titled "Subscribed Users" and contains a table with three columns: "User ID", "User Name", and "Organization". The table is currently empty.

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## Exercise 3.1.1: Create a User Group and Team

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### Scenario

Matrix Retail plans to handle contract orders for the Europe region. To address this area of business focus, Matrix Retail plans to setup specific departments, users, and roles to handle the order processing. As a first step, Matrix Retail wants to create a role called CSR Supervisor and a team for all the CSRs that has access to all of the enterprises of Matrix.

As part of this requirement, complete the following tasks:

1. Create a user group called CSR Supervisor Group.
2. Create a team called CSR Team. The CSR Team must be granted access to the enterprises Matrix Business and Matrix Retail.

### Instructions

For ease of understanding, the exercise is split into four parts. These parts are listed as follows:

1. Procedure to Create a User Group.
2. Procedure to Set Permissions for a User Group.
3. Procedure to Create a Team.
4. Procedure to Configure a Team.

Each procedure is taken up in the following sections.

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## Exercise 3.1.1: Create a User Group and Team

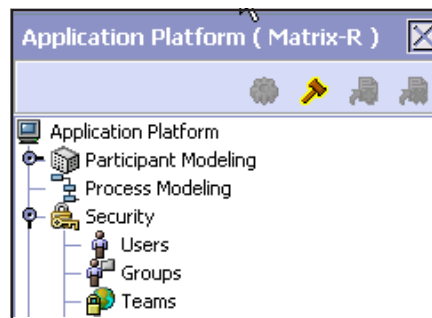
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### Instructions

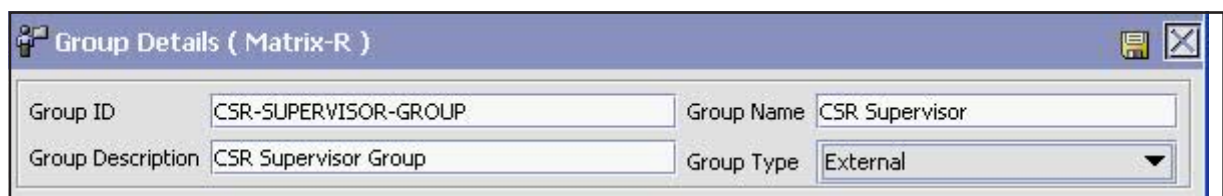
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#### Procedure to Create a User Group

1. From the **Applications Console** launch the **Applications Manager**.
2. Navigate to **Applications > Application Platform**.
3. Load organization rules for Matrix Retail by clicking  from the left pane and selecting **Matrix-R** from the drop-down list, and click **OK**. This loads the organization rules for Matrix Retail.
4. Navigate to **Application Platform > Security**. Double-click **Security**. The options under security as shown in the following figure.



5. Double-click **Groups**. This list shows the available groups in the Groups screen.
6. Click  to create a **User Group**. The Group Details screen is shown.
7. Enter the values in the fields, as specified in the following figure.

The screenshot shows a window titled "Group Details ( Matrix-R )". It contains four input fields: "Group ID" with the value "CSR-SUPERVISOR-GROUP", "Group Name" with the value "CSR Supervisor", "Group Description" with the value "CSR Supervisor Group", and "Group Type" with a dropdown menu showing "External".

8. Click  to save the changes.
- This step completes the procedure to create a user group.

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## Exercise 3.1.1: Create a User Group and Team

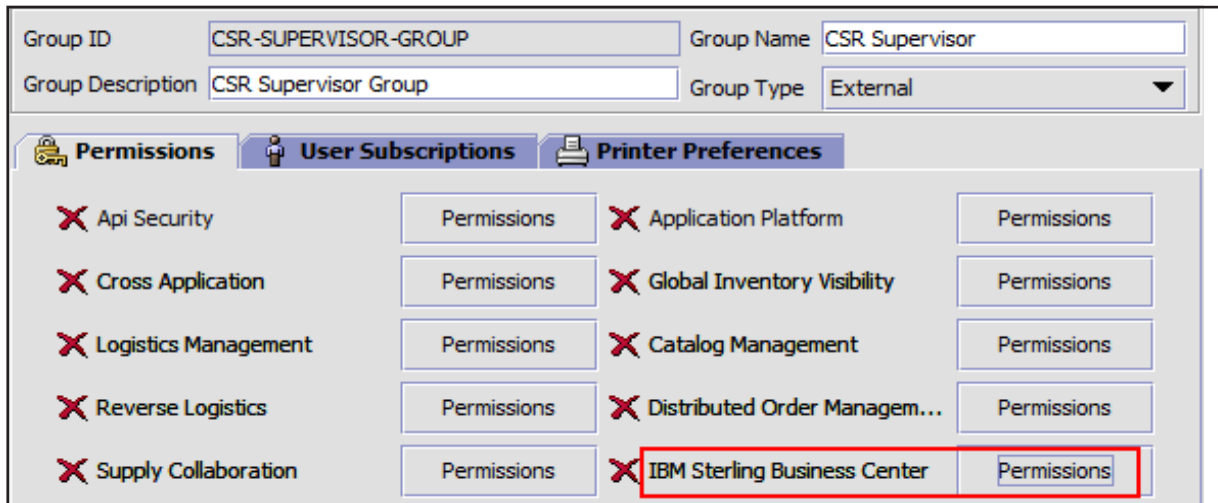
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### Instructions

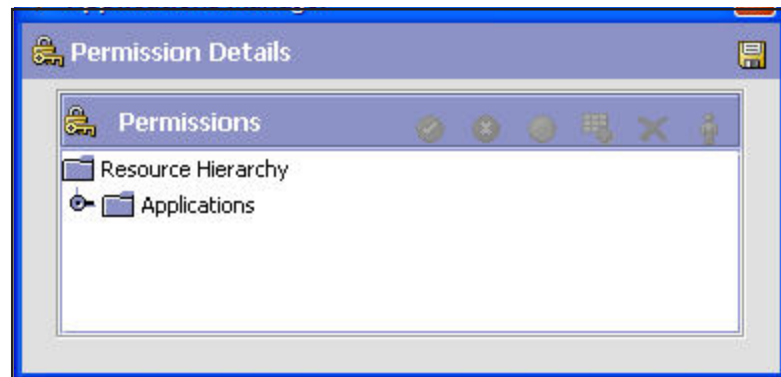
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#### Procedure to Set Permissions for a User Group

1. In the Group Details screen for the CSR Supervisor Group, select the **Permissions** tab as shown in the following figure.



2. Click the Permissions icon next to **IBM Sterling Business Center**. The Permission Details screen shows in a separate window.



3. Click  next to Applications. The Applications option expands to show Sterling Business Center. Expand the tree to view **Modules** in the hierarchy.

(Continued on next page)

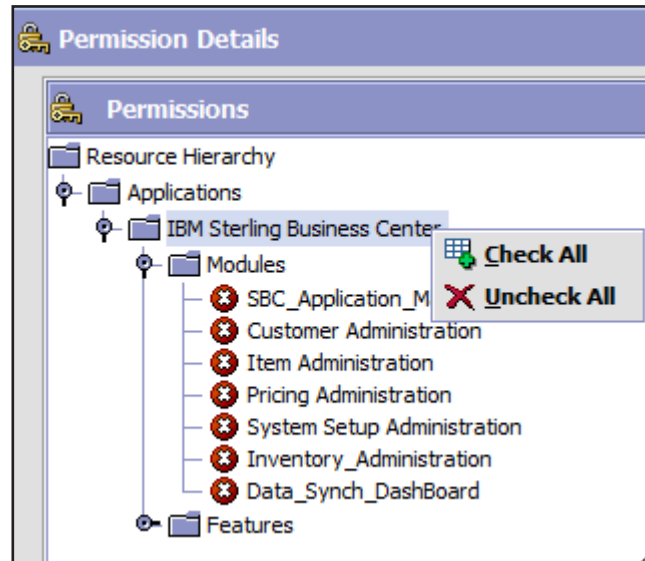
## Exercise 3.1.1: Create a User Group and Team



(Continued)

### Instructions

....(Continued)


4. Right-click **IBM Sterling Business Center** and select **Check All**.



5. Notice that all options under Modules and Features are activated for the user group now.
6. Click  in the **Permission Details** screen.
7. Click  in the Group Details screen. This step completes the procedure to set up permissions for the user group CSR Supervisor Group.

### Procedure to Create a Team

The users that belong to the new CSR team have access to Matrix Business and Matrix Retail.

1. Double-click **Teams**. This list shows all available teams in the Teams screen.
2. Click  to create a team.

(Continued on next page)

## Exercise 3.1.1: Create a User Group and Team

(Continued)

### Instructions

....(Continued)

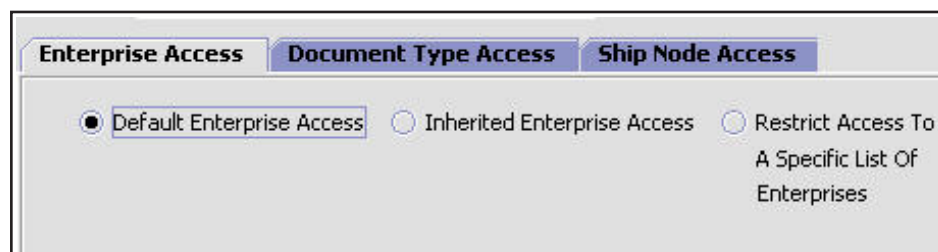
- Enter the values in the fields, as specified in the following figure.



- Click  to save the **Team Details**. The CSR team is now created.



### Procedure to Configure a Team

- In the Team Details screen for the CSR team, the Enterprise Access tab is shown by default as shown in the following figure.



- Select the **Restrict Access To A Specific List of Enterprises** option. The Accessible Enterprises pane shows. By default, Matrix Retail is listed in the Accessible Enterprises list.

Accessible Enterprises	
Enterprise Code	Enterprise Name
Matrix-R	Matrix Retail

- Click  in the Accessible Enterprises bar. The Organization Search window shows.
- Click the  icon to search for all Enterprises. A list of Enterprises is shown.
- Click the Organization Code **Matrix-B** from the Search Results list.


(Continued on next page)


## Exercise 3.1.1: Create a User Group and Team

(Continued)

### Instructions

....(Continued)

6. Click  to add **Matrix-B** to the list of accessible enterprises as shown in the following figure.

Accessible Enterprises 	
Enterprise Code	Enterprise Name
Matrix-R	Matrix Retail
Matrix-B	Matrix Business

7. Click  to save your changes. This step completes the procedure to configure a team.

### Result

You successfully created a user group and a team.

---

## Optional Exercise

---

### Create User Group and Team

Matrix Retail decides to increase its current workforce as part of its business expansion plan. To support this strategy, Matrix Retail has decides to create a role, called Store Supervisor, to manage the expected increase in manpower.

#### **User Role Details**

The users with this role must be able to perform all the actions in Sterling Store except update order details. In addition, the users of this user group must be able to perform all the tasks except the following tasks:

- Change payment method
- Start External URL
- Reconfigure Bundle
- View Procurement Orders
- View Procurement Order Summary
- Extend

In the Sterling Call Center application, provide access only to Override Address Verification.

In the Sterling Application Add-in, provide access to Channel Applications Manager under Application Add-ins

#### **Team Details**

Matrix Retail intends to create a team that can handle all in-store customer orders (sales orders, transfers order, and template orders) and return orders. The team handles the Purchase orders. A specific set of users from each store would belong to this team. The users of this team must have visibility to all the three stores of Matrix Retail.

Assume that you are required to create a user group called Store-Supervisor and a new team called Matrix-Retail-Team.

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(Continued on next page)

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## Optional Exercise

(Continued)

### Instructions

1. Log in to Sterling Selling and Fulfillment Foundation by using user name as admin and password as password.
  2. Load Organization Rules for Matrix Retail.
  3. Create an appropriate user group for Store Supervisor. Set the permissions for the user group to Sterling Store and Sterling Call Center that is as specified in the scenario.
  4. Ensure that the user group has access to Channel Applications Manager in Sterling Application Add-in.
  5. Create a team that is called Matrix-Retail-Team and specify the rules as follows:
    - The users of this team must have access to Matrix Retail only.
    - The users that belong to this team have access to the documents as specified in the scenario.
      - The Sales Order document, Transfer Order Document and Template Order document is in the Distributed Order Management Application.
      - The Return Order is in the Reverse Logistics application.
      - The Purchase Order is in the Supply Collaboration Application.
    - The users of this team have access only to all the three Nodes of Matrix Retail.
-

## Lesson Review

---

### Completed Objectives

This lesson was designed to enable you to:

- Describe Users.
  - Explain different User Attributes.
  - Configure a user group.
  - Configure a team.
  - Configure a Queue.
-

## LESSON 3.2: Configuring Users and Access Policies

---

### Introduction

This lesson provides you with an overview of how to create users and configure access policies for users in Sterling Selling and Fulfillment Foundation.

### Lesson Objectives

This lesson is designed to help you to:

- Create a User.
- Configure Data Access Policies for:
  - Enterprise Users.
  - Buyer Users.
  - Seller Users.
  - Node Users.
- Configure API Security.

### References

For more information on user creation, refer:

- [http://www.ibm.com/support/knowledgecenter/SS6PEW\\_9.5.0/com.ibm.help.config.security.doc/configuration/c\\_DefiningUsers.html](http://www.ibm.com/support/knowledgecenter/SS6PEW_9.5.0/com.ibm.help.config.security.doc/configuration/c_DefiningUsers.html)

Navigate to **Sterling Order Management 9.5.0 > Configuring shared components and users > Users and user security > Defining users**

For more information on configuring access policies, refer:

- [http://www.ibm.com/support/knowledgecenter/SS6PEW\\_9.5.0/com.ibm.help.config.security.doc/configuration/t\\_DefiningDataAccessPolicies.html](http://www.ibm.com/support/knowledgecenter/SS6PEW_9.5.0/com.ibm.help.config.security.doc/configuration/t_DefiningDataAccessPolicies.html)

Navigate to **Sterling Order Management 9.5.0 > Configuring shared components and users > Users and user security > Configuring user security > Defining data access policies**

---



## Create Users and Set Up Primary Information

---

### Overview


Sterling Selling and Fulfillment Foundation allows you to create Users and associate them with organizations. A user is assigned to a user group and team and has access only to those actions and views for which the user group has permissions.

### User Association with an Organization

In Sterling Selling and Fulfillment Foundation, a user is always associated with only one organization. Every organization has its own set of users.

To create a user for a particular organization, you must load the rules of the organization before creating the user.

#### Example

To create a user for an organization XYZ, you must first click the  icon from the left menu and select XYZ from the shown list of organizations. This action loads the rules for the organization XYZ. If you now create a user, that user belongs to the organization XYZ.



#### Note

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A user of an organization can create and configure users only to the organizations which that organization administers. The list of Organizations in the drop-down list includes only the organizations that are administered by the organization. The Administered By attribute is set in the organization Primary Info.

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## Users Overview

(Continued)

### User Configuration

You can create a user in Sterling Selling and Fulfillment Foundation by using the User Details screen. A newly created user can log in only if a user group is set for the user and access permissions are set for the user group.

The following figure shows the User Details screen.

**User Details ( DEFAULT )**

User ID:  User Name:  Password:

**Primary Info** Queue Subscription Printer Preferences

Theme:  Locale:  Department Code:

Team:  Password Policy:  Menu Group:

☒ Active Primary User Group:  Max Customer Assignments:

**Contact Address** **Billing Address**

**Address** **Contact Info** **Address** **Contact Info**

**Group Subscriptions**

Group ID	Group Name
CSR-GROUP	CSR
CSR-LEAD-GRP	CSR Lead
GUEST	Guest

Group ID	Group Name
PricingAdministr...	Pricing Administr...
ItemAdministrat...	Item Administrator
CustAdministrat...	Customer Admin...

(Continued on next page)

## Users Overview

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(Continued)

## User Configuration

....(Continued)

The key details that must be specified for a user are as follows:

- **User ID and Name:** The User ID is the identification code the user uses to access Sterling Selling and Fulfillment Foundation. A User ID can be alphanumeric. For example, LisaR can be the User ID for the name Elizabeth
- **Password:** The Password specifies the password that the user uses to access the Sterling Selling and Fulfillment Foundation.

## Primary Information

The Primary Info tab contains various additional fields that can be used to specify user information. The key details are as follows:

- **Locale:** The Locale determines the time zone for a user and is a mandatory field. The Locale of a user can be different from the Locale that is specified for the organization. For example, a user A Parker might belong to the organization based in US East coast, but work in Asia. In this case, the user's locale is different from the locale of the organization.
- **Theme:** The Theme determines the color scheme of the Application Console and Applications Manager that is shown to a user. You can either select a Theme that is provided by default or create a Theme name.
- **Department Code:** The user can be assigned to any department from the user's organization.
- **Team:** Users can be assigned to a team that created for the organization. The users of a team have access to the documents, nodes and enterprises that is based on their team assignment. For example, sales team.
- **Menu Group:** A Menu Group pertains to the menu options that users see when they log in to the Application Console.
- **Active:** Active pertains to users who are active in the organization. Inactive users cannot log in to Sterling Selling and Fulfillment Foundation.

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(Continued on next page)


## Users Overview

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(Continued)

### Primary Information

....(Continued)

- **Password Policy:** Password Policy is a set of rules to define, control, and manage user passwords. A Password Policy controls Password Strength, Password Generation, Password Reset, login rules, assignment rules, password change rules, and password secret answer rule. Sterling Selling and Fulfillment Foundation provides a set of default Password Policy rules.
  - **Is Supervisor:** Check this option if you want to specify the user is a Personnel Supervisor.
  - **Primary User Group:** A user can be a part of multiple user groups. The primary user group determines their key roles. This attribute can be selected after the user is subscribed to one or more groups.
  - **Max Customer Assignments:** You can limit the number of customer assignments by specifying the Maximum Customer Assignments.
  - **Addresses:** The two types of Addresses can be specified for a user. They are:
    - **Contact Address:** The Address is used to communicate with the user.
    - **Billing Address:** The Billing Address is generally applicable only in buyer organizations. A user in a buyer organization can be billed for purchases that are made on behalf of the organization.
  - **User Subscription to a User Group:** Subscribe or Unsubscribe a user from a user group by using the Available and Subscribed subpanes. You can move the user groups from the available list to the Subscribed list to subscribe a user to the group by clicking .
  - **Available:** The Available list includes both out-of-the-box user groups and user groups that you create.
  - **Subscribed:** The Subscribed subpane shows a list of user groups to which the user is subscribed.
-

## Queue Subscriptions and Printer Preferences

### User Queue Subscriptions

The Queue Subscription tab in the User Details screen allows you to subscribe a user to one or more Alert Queues. An Alert Queue is setup to distribute notifications to users. You can determine which users receive different alert types by assigning them to queues. Users can be collectively assigned to a queue that use their departments.

The following figure shows the Queue Subscriptions tab.

Queue ID	Queue Name
DEFAULT	DEFAULT
YCD_ANNOUNCE...	System Announce...
YCD_CUSTOMER_...	Customer Notifica...
YCD_DUPLICATE_...	Duplicate Order
YCD_FRAUD_QUE...	Fraud Queue
YCD_PAYMENT_A...	Payment Auth Re...

Subscribe or Unsubscribe a user from an Alert Queue by using the Available and Subscribed sub panes. Click to move the selected queue to the Subscribed list from the Available list. Click to remove the Queue from the Subscribed list. The sub panes in the Queue Subscriptions pane are explained in the following points.

- **Available:** The Available subpane shows a list of the available queues.
- **Subscribed:** The Subscribed subpane shows a list of queues to which the user is subscribed.

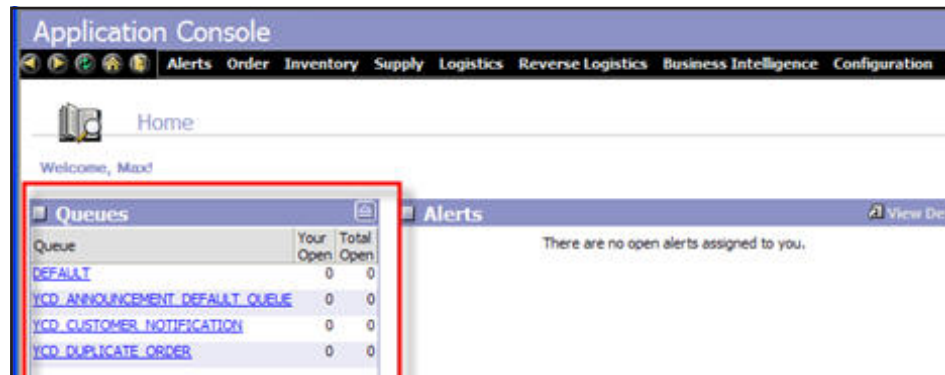
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## Queue Subscriptions and Printer Preferences

(Continued)

### Queues Assigned to a User

The queues assigned a user are shown on the Login home page of the Application Console. The following figure indicates the Login home page of a user with the assigned queues.

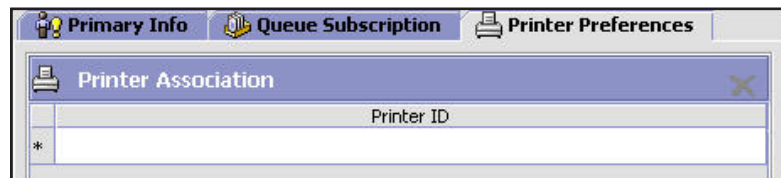


### Printers Preferences

The Printer Preferences tab in the User Details screen allows you to configure Printers that are associated with a specific user. This preference is used to determine the Printer to use when a user prints a document. For easier administration, it is better to associate a Printer with a user group instead of an individual user.

#### Printer Preferences Tab Screen Layout

The following figure shows the **Printer Preferences** tab.




## User Hierarchy

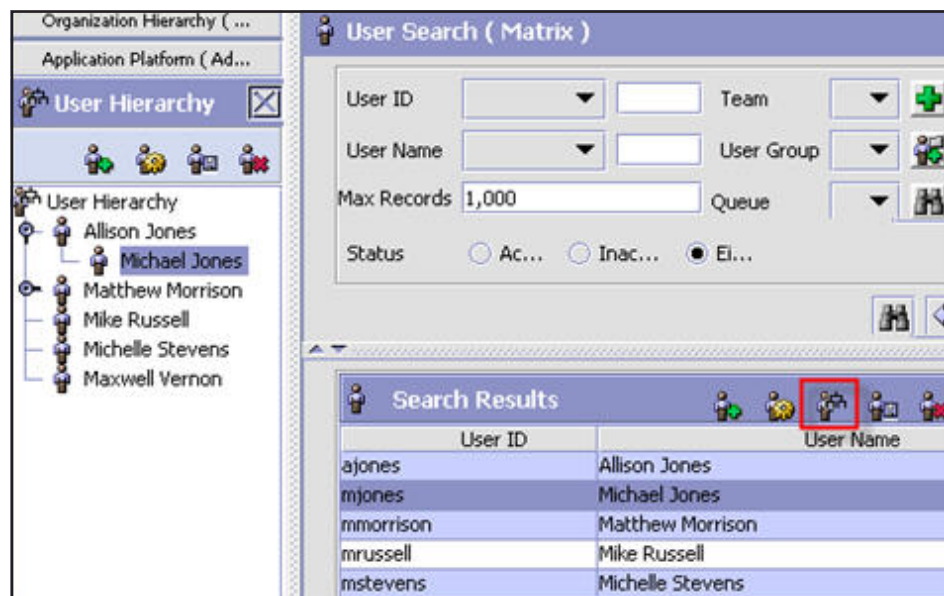
### Overview

Sterling Selling and Fulfillment Foundation allows you to define a User Hierarchy in the system to establish the chain of command as it exists in the organization. For example, all users who have the same supervisor are placed under that supervisor in the hierarchy. The users in a hierarchy can belong to different user groups or teams.

### User Hierarchy Configuration

The User Hierarchy can be viewed or set from the User search screen. On selection of the user in the User Search screen, User Hierarchy icon  is activated.

By clicking the icon, the Hierarchy Tree is shown in the left menu pane, as shown in the following figure. You can drag-and-drop users in the Hierarchy Tree to change the hierarchy.



### User Hierarchy Window Options

The User Hierarchy window has the following options:

- Save the selected user as a new user.
- View and Modify the details of the user.
- Delete the user.
- Change the position of the user in the Hierarchy.

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## Setup Data Access Policy Rules

---

### Overview

Sterling Selling and Fulfillment Foundation helps to control user access to data, such as orders and shipments, through global rules configuration that is based on the user type. This configuration is set through the Data Access Policy Configuration. Data access policies can be defined to control user's access to data contained in specific document types, enterprises, and ship nodes.

Data access policies apply to the following access modes:

- Enterprise User Access
- Buyer User Access
- Seller User Access
- Node User Access

### Data Access Policy Rules for Enterprise Users

An enterprise user belongs to the Enterprise that brokers business. Each Enterprise can contain multiple organizations that are assigned various roles. You can configure access for an enterprise user, such as an Internal Storefront administrator, by using the Enterprise User tab of the Data Access Policy screen.

The Data Access Policy set is applicable only if the option to "Use Deprecated Data Access Policy" option is cleared in the Application Platform-> System Administration-> Installation Rules tab. If this option is checked, the data access policies is not configurable from the Application Platform and is controlled through API.

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## Setup Data Access Policy Rules

(Continued)

### Data Access Policy Rules for Enterprise Users

....(Continued)

The Enterprise Data Access Policy controls the enterprise data access and customer access of the enterprise users. The Data Access policies can be set only at the Hub level and are applied to transactional and master data only. Access policies are not applied to configuration data, such as organization and users.

#### Data Access Policy: Enterprise User Screen Layout

The following figure shows the Enterprise User tab.

The screenshot shows a configuration window with four tabs: Enterprise User, Buyer User, Seller User, and Node User. The Enterprise User tab is selected. The window contains three main sections: Enterprise Access, Customer Access, and Supervisor Access. Each section has radio buttons for different access policies.

Section	Option	Selected
Enterprise Access	Users Have Access To Their Enterprise Only	Yes
	Users Have Access To All Enterprises Assigned To Their Team	No
Customer Access	Users Have Access To Selected Customers According To Team Configuration	No
	Users Have Access To All Customers	Yes
Customer Hierarchy Access	Users Have Access To Their Customers	No
	Users Have Access To Customers And Their Child Customers	No
Supervisor Access	Supervisors Have Access To Customers Assigned To Their Team	No
	Supervisors Have Access To Customers Assigned To Their Team And Child Teams	No

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## Setup Data Access Policy Rules

(Continued)

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### Data Access Policy Rules for Enterprise Users

....(Continued)

The key details are as follows:

- **Enterprise Access:** You can specify whether enterprise users have access only to their enterprise or to all the enterprises assigned to their team.
- **Customer Access:** You can specify whether enterprise users have access only to the customer as per their team configuration or to all the customers of the enterprise.
- **Customer Hierarchy Access:** Configure if the users must have access only to customers assigned to the Enterprise or to all the assigned customers and their child customers.
- **Supervisor Access:** Configure if the supervisors can have access to all the customers that their team or to all the customers assigned to their team and all child teams.

### Data Access Policy Rules for Buyer Users

A buyer user belongs to the organization that purchases products from an Enterprise or other Seller organizations. You can configure access for a buyer user, such as a Customer Buyer, by using the Buyer User tab under the Data Access Policy screen.

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## Setup Data Access Policy Rules

(Continued)

### Data Access Policy Rules for Buyer Users

....(Continued)

The following figure shows the Buyer User tab.

The screenshot shows the 'Buyer User' tab selected among four tabs: Enterprise User, Buyer User, Seller User, and Node User. The configuration is organized into several sections:

- Customer Access**
  - Default Customer Access**
    - ☒ Users Have Access To Data For Their Customer Organization Only
    - ☐ Users Have Access To Data For Their Customer Organization And Child Customer Organizations
    - ☐ Users Have Access To Their Data And Data For Their Subordinate Users
  - Customer Access Exceptions**

Users Assigned To The Following Groups Have Expanded Access

    - ☒ Users Have Access To Data For Their Customer Organization Only
    - ☐ Users Have Access To Data For Their Customer Organization And Child Customer Organizations
  - Assigned Customer Access**
    - ☒ Users Have No Assigned Customer Organizations
    - ☐ Users Have Access To Data Based On Their Assigned Customer Organizations

**Assigned Customer Hierarchy Access**

    - ☐ Users Have Access To Data For Their Assigned Customer Organizations
    - ☐ Users Have Access To Data For Their Assigned Customer Organization And Child Customer Or...
- Anonymous User Access**

Users Assigned To The Following Groups Have Anonymous Access

The key details for Buyer User Data Access Policy are as follows:

- **Default Customer Access:** The customers to whom a user from the Buyer organization has access can be configured. The options are as follows
  - Access to data only for the buyer organization's Customer organizations.
  - Access to data for their Customer organization and Child Customer organization's customer.
  - Access to their own data and the data of subordinate users.

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## Setup Data Access Policy Rules

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(Continued)

### Data Access Policy Rules for Buyer Users

....(Continued)

- **Customer Access Exceptions:** You can specify exceptions to the Default customer access for the users who belong to a specified list of user groups. The option is provided to select a list of user groups who need expanded access. For this list of users, the following access options can be configured:
  - Users have access to data only for their customer organization.
  - Users have access to data for customer organizations and their child organizations.

For example, the data access policy is set such that a buyer organization user has access only to their customer organization. However, it is required that the CSR-Lead user group must have access to all the child organization's customer. This group can be provided expanded access through the customer access exceptions.
- **Assigned Customer Access:** You can specify if users should or should not access data for assigned customer organizations based upon the following parameters:
  - Users do not have any assigned customer organizations.
  - Users can access data for assigned customers, as specified in the Assigned Customer Hierarchy Access box.

**Assigned Customer Hierarchy Access**

    - Users can access data for their assigned customers only.
    - Users can access data for their assigned customers as well as child customer organizations.
- **Anonymous User Access:** This section allows you to specify user groups which are given anonymous access. If a user belongs to such a user group, the user is also given anonymous access.

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## Setup Data Access Policy Rules

(Continued)

### Data Access Policy Rules for Seller Users

The seller user belongs to the Organization that supplies products to the Enterprise or other buyer organizations. You can specify whether the seller users have access to their organization alone. The following figure shows the Seller User tab.

The screenshot shows a configuration window with four tabs: Enterprise User, Buyer User, Seller User, and Node User. The Seller User tab is selected. Below the tabs, there is a section titled 'Seller Access' containing a single checkbox labeled 'Users Have Access To Their Organization Only', which is checked.

### Data Access Policy Rules for Node Users

The Node User belongs to an Organization that represents a Physical Location, whether a manufacturing plant, small stock room, or warehouse area. You can specify whether the Node Users have access only to their nodes or to all the nodes assigned to their team. The following figure shows the Node User tab.

The screenshot shows a configuration window with four tabs: Enterprise User, Buyer User, Seller User, and Node User. The Node User tab is selected. Below the tabs, there is a section titled 'Node Access' containing two radio button options. The first option, 'Users Have Access To Their Node Only', is selected with a filled circle. The second option, 'Users Have Access To Nodes Assigned To Their Team', is unselected with an empty circle.

### Catalog Access Policies

Catalog Access Policies are applied when a user manages Catalog Data, such as items, categories, and attributes. These policies are therefore applied to Enterprise or catalog organization users. Catalog access policies are not applied if a user views only Catalog Data.

A catalog organization user can manage data for:

- The user's Organization.
- Any Organization that the user's Organization administers.

However, a catalog organization user cannot manage data for subcatalog organizations. Similarly, a subcatalog organization user can manage data for the user's own Organization or for the Organizations that the user's Organization administers.

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## Setup Data Access Policy Rules

(Continued)

### Pricing Access Policies

Pricing Access Policies are only applied to Enterprise, Seller, or pricing organization users. Any user who plays these roles can manage pricing data for:

- The user's Organization.
- The child organizations that the user's organization administers.

Users can see all Price Lists that their pricing organization defines, but they can modify only the Price Lists of their own pricing organization.

### Configure API Security Overview

You can define access to API Resources to control user access when calling an API. When calling an API, a user must pass through the following two levels of security:

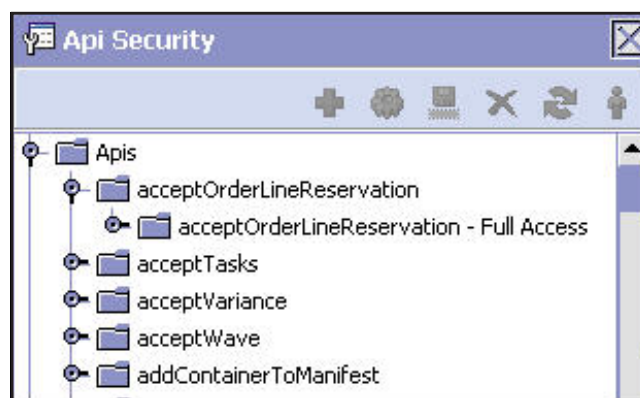
1. Authentication Check

An Authentication Check uses user ID, a certificate or both. The login API is called before any other API is called.

2. Authorization Check

An Authorization Check verifies which resources a user can access. This security procedure is for every API call that is made through an application server process. By default, Agent and Integration Servers always have full access to APIs.

The following figure shows the expanded API security pane.



## Exercise 3.2.1: Create a User

### Scenario

Matrix Retail recently hired a user, Allen Parker, for the role of a CSR Supervisor. You are required to set up the user profile for the new user.


### Instructions

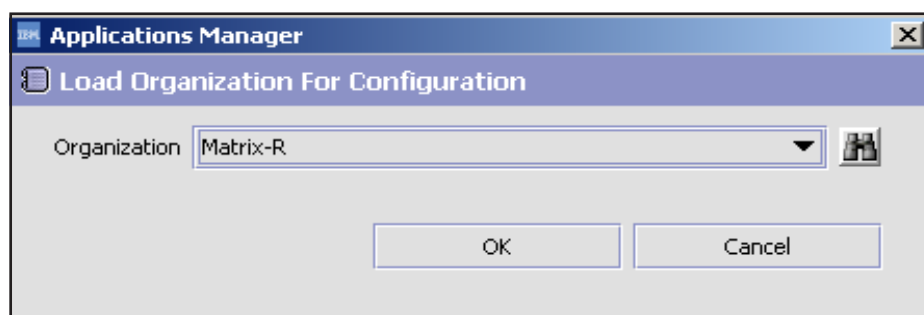
For ease of understanding, the exercise is split into two parts. These parts are listed as follows:

1. Procedure to Create a User.
2. Procedure to Set up Primary Information for a User.

Each procedure is taken up in the following sections.

#### Procedure to Create a User

1. From the **Applications Console** launch the **Applications Manager**.
2. Navigate to **Applications > Application Platform**.
3. Load Organization rules for Matrix Retail by clicking  from the left pane and selecting **Matrix-R** from the drop-down list as shown in the following Figure. This action loads the Organization rules for Matrix Retail.



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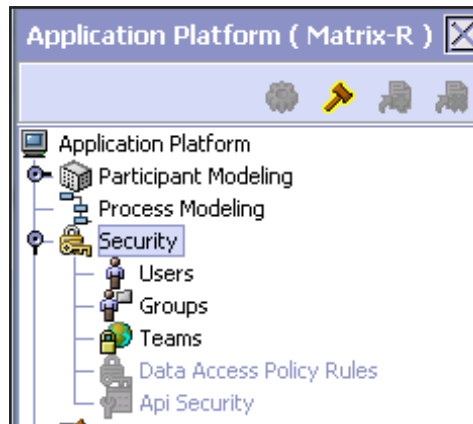
## Exercise 3.2.1: Create a User


(Continued)

### Instructions

....(Continued)

4. Navigate to **Application Platform > Security**. Double-click **Security**. The options under security are shown in the following figure.



5. Double-click **Users** to show the **User Search** screen.
6. Click  to create a user to view the **User Details** screen.
7. Enter the values in the fields, as shown in the following figure. Set the password to *aparker*. Ensure that you also select the locale before clicking **Save**.

A screenshot of the 'User Details (Matrix-R)' window. It contains several input fields and tabs. The 'Primary Info' tab is selected. The fields are: User ID (aparker), User Name (Allen Parker), Password (masked with dots), Theme (Earth), Locale (English (United States Easter...)), and Department Code (empty). There are also tabs for 'Queue Subscription' and 'Printer Preferences'.

8. Save the user details. This step completes the procedure to create a user.

(Continued on next page)




## Exercise 3.2.1: Create a User

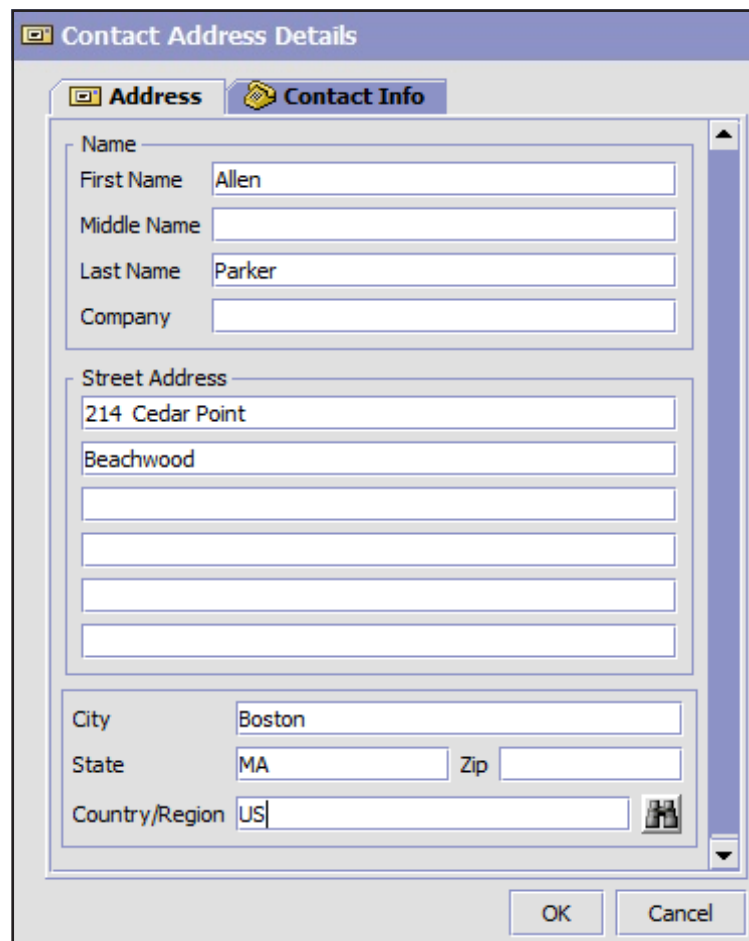
(Continued)

### Instructions

....(Continued)

#### Procedure to Set Up Primary Information for a User

1. In the User Details screen for the user aparker, enter the values in the Name, Street Address, City, State, Country fields, as specified in the following figure. To enter the address, click  in the Contact Address panel.



The image shows a 'Contact Address Details' dialog box with two tabs: 'Address' and 'Contact Info'. The 'Address' tab is active. It contains several input fields for user information. The 'Name' section includes 'First Name' (Allen), 'Middle Name' (empty), 'Last Name' (Parker), and 'Company' (empty). The 'Street Address' section includes a multi-line text area with '214 Cedar Point' and 'Beachwood'. The 'City' field is 'Boston', 'State' is 'MA', 'Zip' is empty, and 'Country/Region' is 'US'. There are 'OK' and 'Cancel' buttons at the bottom right.

Contact Address Details	
<b>Address</b>   <b>Contact Info</b>	
<b>Name</b>	
First Name	Allen
Middle Name	
Last Name	Parker
Company	
<b>Street Address</b>	
214 Cedar Point	
Beachwood	
City	Boston
State	MA
Zip	
Country/Region	US
OK Cancel	

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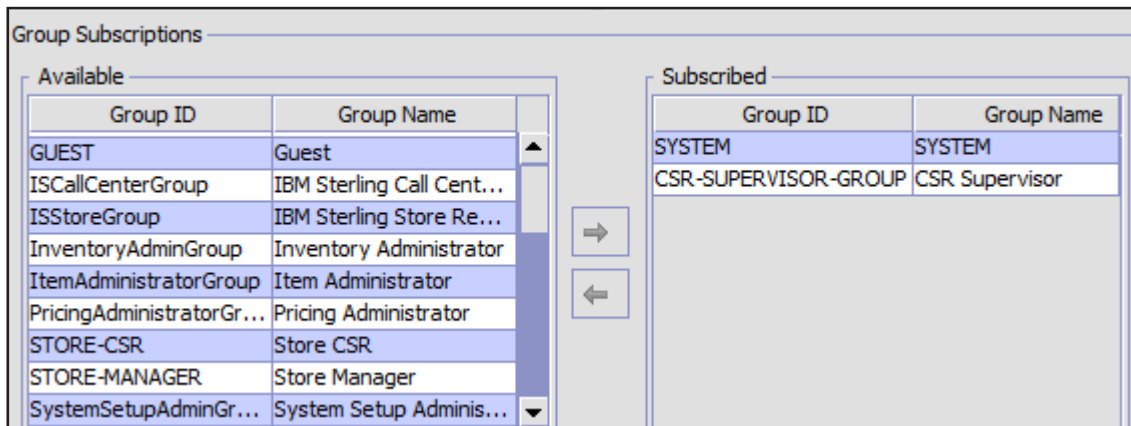
## Exercise 3.2.1: Create a User

(Continued)

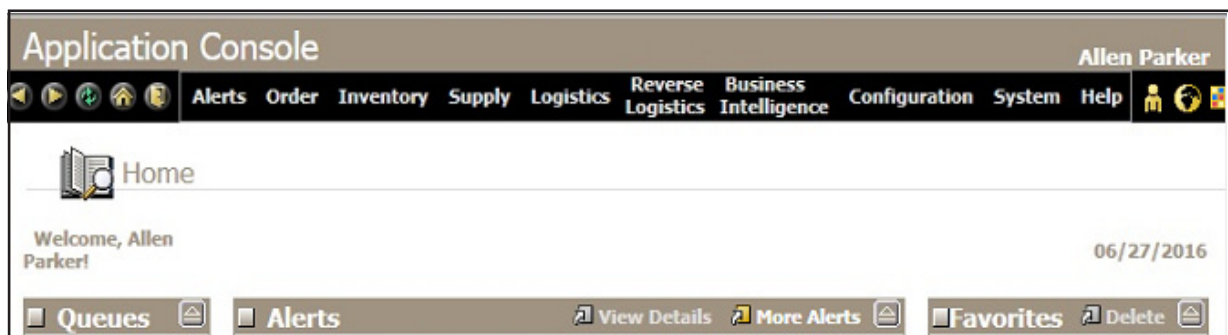
### Instructions

....(Continued)

- From the **Group Subscriptions**, assign the **CSR-SUPERVISOR-GROUP** and **SYSTEM** to the new user as shown in the following figure.



- Click to save your changes. This step completes the procedure to set up Primary Information for the user **aparker**.
- As a check, you can log in to the Application Console with the credentials set for aparker. You see the Application Console screen specifically configured for aparker, as shown in the following figure.



### Result

You successfully created a user and set up the primary information for the user.

## Optional Exercise

---

### Create User

As part of their business expansion plan, Matrix Retail hired Andrea Peterson as a new manager to manage the store supervisors of all the three stores of Matrix Retail. Her primary responsibilities are to monitor the store supervisors who manage the sales and return orders of these stores. Her locale is the same as the organization Matrix Retail.

Andrea is a manager and monitors the store supervisors who manage the sales and return orders of these stores. The supervisors belong to Matrix Retail team that handles the sales and return orders. Ensure that you set the following details for Andrea.

- Password Policy: Matrix-R Reset
- Menu Group: Default Menu
- Contact and Billing address: Andrea Peterson, #789, Ralph Avenue, Boston MA, US
- Group: CSR-Lead-Group

Assume that you are an administrator with Matrix. You are required to create a user profile for Andrea Peterson and setup the necessary user details.

### Instructions

1. Log in to Sterling Selling and Fulfillment Foundation by using user name as **admin** and password as **password**.
2. Create a user apeterson and set the primary details for Locale, Theme, and Password Policy.
3. Ensure that the user has supervisor rights.
4. Subscribe her to the specified group and assign the correct team to her.

### Result

When you perform a user search, the user Andrea Peterson shows in the search results.

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## Check Your Understanding

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The following set of multiple choice questions enable you to evaluate your understanding of the concepts covered and reinforce the content presented so far. The answer key for these questions are provided in the Appendix of this course.

### Questions

1. A user can be subscribed to only one user group.
    - True
    - False
  2. Which of the following options is the primary mechanism for enforcing user security?
    - Teams
    - User Groups
    - Data Access Policies
    - Customized Menus
  3. Users are created by the Hub user only while in the Hub environment (Hub rules loaded).
    - True
    - False
  4. Users can be subscribed to as many queues as needed.
    - True
    - False
-

## Lesson Review

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### Completed Objectives

This lesson was designed to enable you to:

- Create a user.
  - Configure Data Access Policies for:
    - Enterprise Users
    - Buyer Users
    - Seller Users
    - Node Users
  - Configure API security.
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## ***Unit 4: Case Study***

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This unit presents a full-blown case study of a multi-divisional corporation to help you understand the different participants in the supply chain and map their appropriate roles in Sterling Selling and Fulfillment Foundation.

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## LESSON 4.1: Sample Case Study

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### Introduction

This lesson presents a full-blown case study of a multi-divisional corporation to help you understand the different participants in the supply chain and map their appropriate roles in Sterling Selling and Fulfillment Foundation.

### Lesson Objectives

This lesson is designed to enable you to:

- Map participants to their appropriate roles in Sterling Selling and Fulfillment Foundation.
  - Create Organizations in Application Platform.
  - Assign suitable roles to each organization in the supply chain network.
  - Configure attributes that are related to each role.
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## Case Study Description

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### General Description

Acme Ltd is a market leader in sales and distribution of Cameras and Photocopiers. One of its selling channels is call centers. The Call Centers capture orders for cameras and requests for photocopiers. The Sales Team brings in the orders for photocopiers and passes on to the Customer Service department, which in turn enters the orders into the system. Acme's customers range from large specialty retailers to individual Buyers.

Acme Ltd. has two sales departments, that are headed by different Sales Managers. One department handles sales of cameras and camera accessories; the other takes care of selling copiers and copier accessories. It has one centralized purchasing department that handles purchases of both raw materials and finished goods. Acme has one manufacturing plant in Texas and two Distribution Centers (DCs), one in Boston and the other in Sunnyvale. These two Distribution Centers store only finished goods.

### Suppliers of Acme Ltd

The following Organizations are the Selling Organizations that sell goods to Acme Ltd.:

- Inkscribe supplies different models of digital cameras, SLR cameras, and camera accessories. Inkscribe has a warehouse in Denver, from where it ships finished goods to both Boston and Sunnyvale DCs.
- Selectron supplies copiers and copier accessories to Acme. Selectron has an office and warehouse in Wichita.

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## Case Study Description

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### Customers of Acme Ltd

The following organizations are the Purchasing Organizations that buy goods from Acme Ltd:

- BizNet is one of the biggest customers of Acme Ltd that buys Photocopiers from Acme Ltd. Acme fulfills the orders of BizNet through its Boston or Sunnyvale warehouse on the basis of where the material is required in BizNet network. BizNet has two Nodes in different states. One warehouse is in Atlanta and the other is in Phoenix.
- CameraZone is another customer who buys all type of cameras from Acme Ltd. Acme always sends the cameras to Laverton Node of CameraZone. Though CameraZone primarily buys Cameras from Acme Ltd, it also places orders for Copiers.
- Several individual Buyers prefer buying directly from Acme Ltd. They can go to the website of Acme and place an order for goods.

### Business Relationships

Another significant aspect of Acme business is that there is a two-way business relationship between Acme Ltd and BizNet. Biznet that buys photocopiers from Acme Ltd,. They sell office stationery to Acme Ltd. BizNet fulfills the orders to Acme Ltd through its Phoenix warehouse.

### Conclusion

Acme Ltd chose Sterling Selling and Fulfillment Foundation to manage its orders through its extended supply chain.

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## Instructions to model Acme Ltd

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### Instructions

To model the participants of this case study, you must:

1. Interpret the case study and list all the participants in the supply chain.
  2. Identify the roles of the participants from the case study description,
  3. Draw a participants model diagram and assign the roles to each participant.
  4. Create each organization and assign the appropriate roles in Application Platform.
  5. Configure the primary information and other organizational attributes for each organization.
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## Lesson Review

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### Completed Objectives

This lesson was designed to enable you to:

- Map participants to their appropriate roles in Sterling Selling and Fulfillment Foundation.
  - Create Organizations in Application Platform.
  - Assign suitable roles to each organization in the supply chain network.
  - Configure attributes that are related to each role.
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