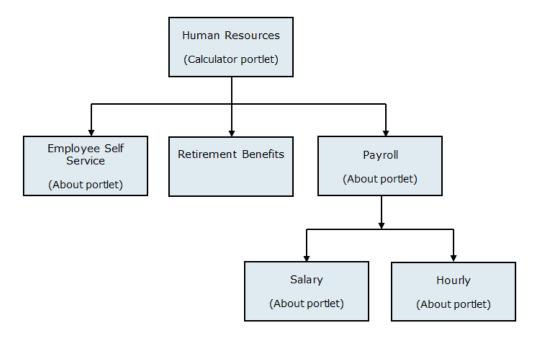
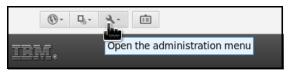
## Section 2: Creating the Human Resources page hierarchy

The following diagram illustrates an example hierarchy of the Human Resources pages.



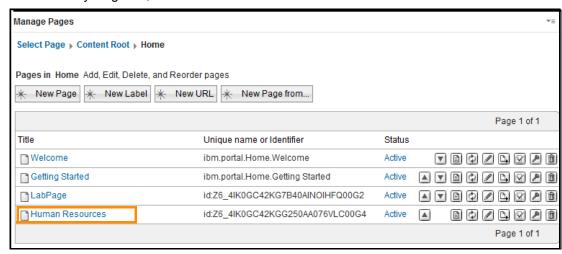
In this section, you create the Human Resources page hierarchy. In the next section, you place the indicated portlets on the pages.

- Create the Human Resources page.
  - \_\_ a. Click the Open the administration menu link.



- \_\_ b. Click Portal User Interface > Manage Pages > Content Root > Home in the portal.
- Click New Page, to see the New page pane.

\_ d. Enter **Human Resources** for the Title on the New page pane. Keep the defaults for everything else, and click **OK**.

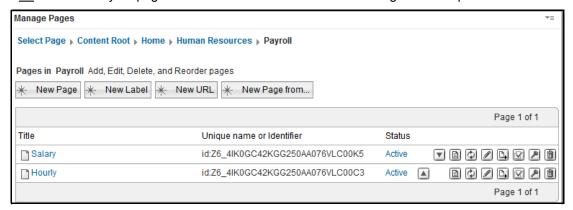


- \_\_ e. Click **Human Resources**. No pages currently exit under Human Resources.
- \_\_\_ 2. Create the pages directly under the Human Resources page in the hierarchy.
  - \_\_ a. Follow steps **c** and **d** in the previous step to create the following pages.
    - Employee Self Service
    - Retirement Benefits
    - Payroll
    - \_ b. Your Human Resources page should now look similar to the following screen capture.

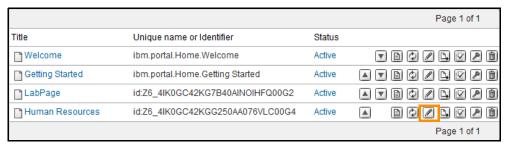


- \_\_ c. Click **Payroll.** No pages current exit under Payroll.
- \_\_\_ 3. Create the pages directly under the Payroll page.
  - a. Follow the same steps to create the following pages:
    - Salary
    - Hourly

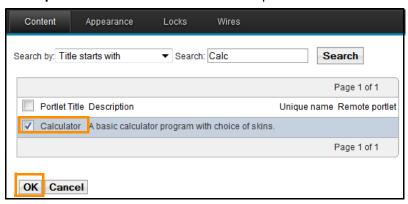
\_\_ b. Your Payroll page should now look similar to the following screen capture.

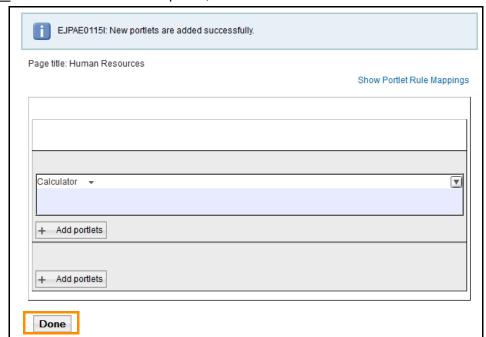


- 4. Assign portlets to pages in the Human Resources page hierarchy.
  - \_ a. On the left navigation tree, click **Portal User Interface > Manage Pages > Content Root > Home**.



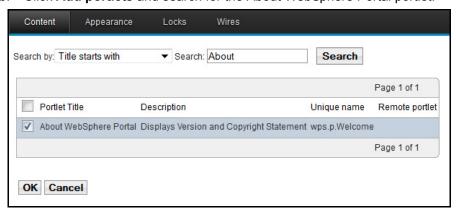
- \_\_ b. For **Human Resources**, click the pencil icon to assign the portlet to page.
- \_\_ c. Click **Add portlet** and search for the Calculator portlet.





\_ d. Select the Calculator portlet, and click OK.

- e. Click **Done**.
- \_\_\_ 5. Add the **About WebSphere Portal** portlet to the Employee Self Service page.
  - \_\_ a. For **Employee Self Service**, click the pencil icon to assign the portlet to page.
  - b. Click **Add portlets** and search for the About WebSphere Portal portlet.



- \_\_ c. Select the **About WebSphere Portal** portlet, and click **OK**.
- \_\_ d. Click **Done** on the success message.
- \_\_ 6. Repeat Step 5 and add the **About WebSphere Portal** portlet to the following pages in the hierarchy.
  - Payroll
  - Salary

- Hourly
- \_\_\_ 7. Verify the Human Resources page hierarchy that you created.
  - \_\_ a. Open the site menu (globe), and click **Home.**



Click the new **Human Resources** tab.



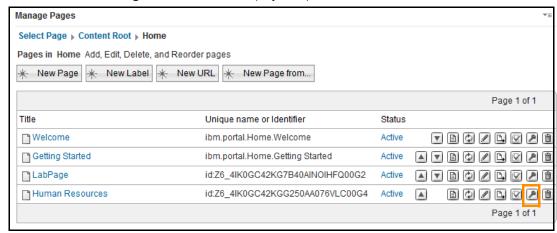
- \_ c. Verify that you see the Calculator portlet on the Human Resources page, and that you see the tabs for the pages: Employee Self Service, Retirement Benefits, and Payroll.
- \_\_\_ d. Click each page in the hierarchy to verify its contents. You should see the About WebSphere Portal portlet all but the Retirements Benefits page.



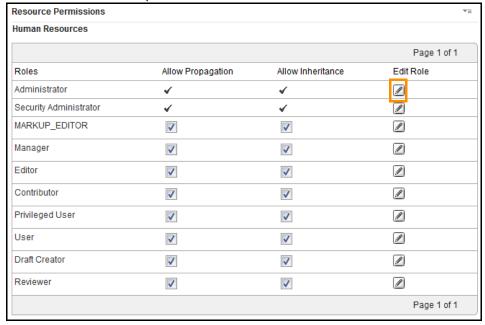
### Section 3: Viewing the initial security permissions

In this section, you declare an administrator and an administrative user group during portal installation, which are assigned initial access. Three predefined virtual users and groups are also created during portal installation and are used to configure initial access rights for an abstract set of users. In this task, you view these initial default permissions. You do not change any permissions now because permissions are assigned later in the exercise.

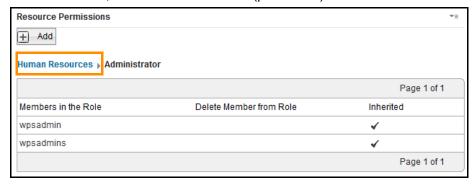
- 1. Open the administrative menu, and click Portal User Interface > Manage Pages.
- 2. Click Content Root > Home.
- \_\_ 3. In the Manage Pages pane (see following screen capture), for the Human Resources page, click the **Set Page Permission** icon (key icon).



\_\_ 4. Notice that some permissions are preset, by default, for the roles that are shown in the Resource Permissions pane.

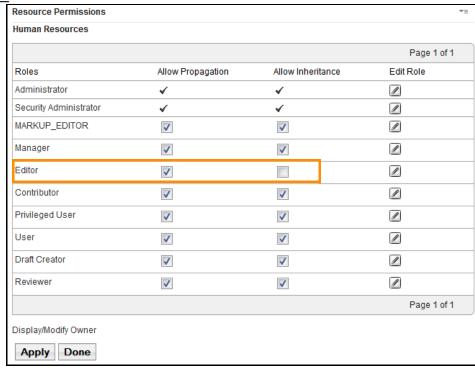


\_\_\_ 5. For Administrator, click the **Edit Role** icon (pencil icon).



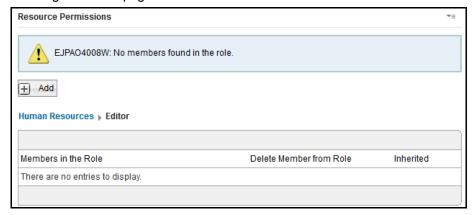
User **wpsadmin** and the group **wpsadmins** have full administrative rights on this page, which are inherited from the parent node of the Human Resources page. Notice that you cannot delete these members from this role.

- \_\_\_ 6. Go back by clicking **Human Resources** in the breadcrumb trail.
- \_\_ 7. In a previous exercise, you granted the editor permission for All authenticated users. To complete this exercise, you are going to remove that setting for the Human resources pages.
  - a. Clear Allow Inheritance for Editor.



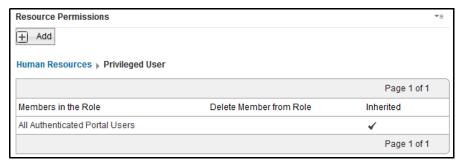
- \_\_ b. Click **Apply**.
- \_\_ c. Click **OK** on the verification dialog.

\_\_ d. Click the **Edit Role** icon (pencil icon) for the **Editor** role to determine who has editor rights on this page.



As shown, no members are in this role, which was also inherited from the parent node of the Human Resources page, and none are explicitly assigned.

\_\_ e. Go back by clicking **Human Resources** in the breadcrumb trail. For **Privileged User**, click the **Edit Role** icon.



The **All Authenticated Portal Users** group is listed as an inherited role as shown.



### **Important**

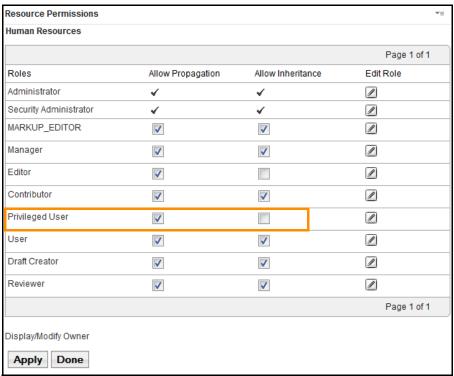
#### The Privileged User role

Users lose the *Anonymous Portal User* identity after successfully logging in, and become authenticated members of the *All Authenticated Portal Users* virtual user group. All Authenticated Portal Users are, by default, assigned the *Privileged User* role on non-administrative pages and portlet applications. This access gives all authenticated users the right to make personal customizations.

## Section 4: Setting and verifying page permissions

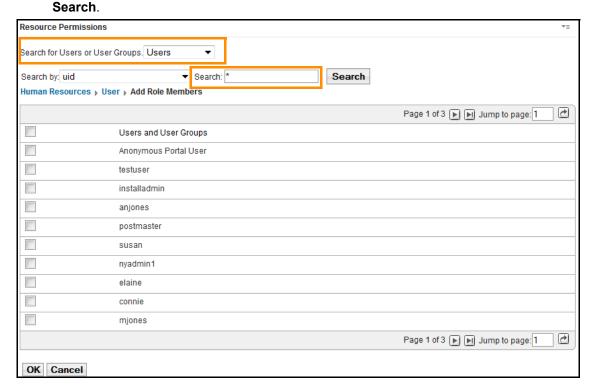
In this section, you modify the permissions for Privileged User and User roles on the Human Resources page. You also block inheritance of the privileged User role to stop personal customizations of the Human Resources page.

- 1. Return to the Human Resources resource permissions pane. Notice that you do not have a choice to clear the Allow Propagation or Allow Inheritance check boxes for the Administrator and Security Administrator roles.
- \_\_ 2. On the Human Resources page, clear the Allow Inheritance check box for the Privileged User role.



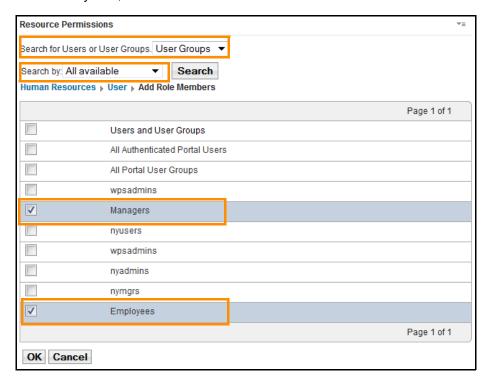
_ 3		ou must click Apply for changes to take effect. If you click Done without first clicking Apply, e changes are not applied. To illustrate this behavior:
_	a.	Clear or verify that the Allow Inheritance for the Privileged User role is cleared.
_	b.	Click <b>Done</b> .
_	C.	Click the <b>Set Page Permissions</b> icon (key icon) for the Human Resources page.
-	d.	Observe that the Allow Inheritance check box is still checked. In this example, the changes were not applied.
4. In contrast, any permissions that are set in the parent node of the Human Res for this role are no longer inherited after you apply this change. Explore this be		
_	a.	Clear Allow Inheritance for the Privileged User role.
_	b.	Click Apply.

_	c. When you see the message "Are you sure you want to modify this resource", click <b>OK.</b>
5.	Click the <b>Edit Role</b> icon (pencil icon) for the Privileged User role. No entries are displayed. Go back to the <b>Human Resources</b> page.
6.	Clear the Allow Inheritance for the User role.
_	a. Clear Allow Inheritance for the User role.
_	b. Click Apply.
	c. When you see the message, "Are you sure you want to modify this resource?", click <b>Ok</b>
7.	Click the <b>Edit Role</b> icon for the User role. No members are in this role.
8.	Click <b>Add</b> to add users or groups to the User role.
9.	As shown in the following screen capture, select <b>Users</b> from the Search for Users or User Groups menu to see a list of users. In the Search field, type an asterisk (*), and click

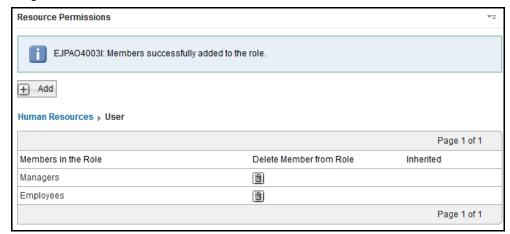


\_\_ 10. You do not choose an individual user now. (Your list might not exactly match the one shown in the screen capture.)

\_\_ 11. From the Search for Users or User Groups list, click **User Groups** to see a list of groups. In the Search by field, select **All available** and click **Search**.



- \_\_ 12. Select the **Employees** and **Managers** check boxes. Click **OK** to add these groups to the User role.
- \_\_ 13. You should see the Members successfully added to the role message and Employees and Managers are listed under the "Members in the Role" column, as illustrated in the following figure.

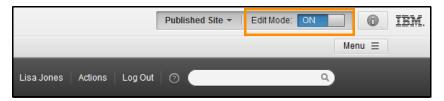


\_\_\_ 14. Go back to the Human Resources page and click **Done**.

### **Setting page permissions**

Members of the Employees and Managers groups, which are now under the User role, can read the Human Resources page. They cannot make any personal changes to it. The changed permissions are propagated to all Human Resources child pages, the pages under Human Resources, which means Employees and Managers have User role permissions on all pages under Human Resources. You change permissions to some of the pages under Human Resources later in this exercise.

In the Manage Pages pane, click Human Resources.
 Click the Set Page Permissions icon (key icon) for the Retirement Benefits page. Any child page has the same permissions in this example.
 Click Edit Role for User. Notice that Employees and Managers are members. Go back by using the breadcrumb trail.
 Click Edit Role for Privileged User. No members are in this role. Go back by using the breadcrumb trail.
 You did not make any changes to the roles, so click Done.
 Click Log Out.
 Enter lisa as the User ID and IBMpOrtal as the Password and click Log in. The user Lisa Jones is a member of the Employees group.
 Click the Human Resources tab.
 Click Edit Mode. Edit Mode is either ON or OFF. Click ON.



- 10. Notice that as user Lisa, you do not have permissions to customize the page, as shown.
- \_\_\_ 11. Log out and log back in as wpsadmin.

### Section 5: Allowing customization

In this section, you allow members of the Employees or Managers group the right to customize the Employee Self-Service page through the *Privileged User* role. You also limit access to the Payroll page by creating an inheritance block.

To allow customization, by using the following steps.

- \_ 1. Open the administrative menu, and click Portal User Interface > Manage Pages > Content Root > Home > Human Resources.
- \_\_ 2. For the Employee Self-Service page, click **Set Page Permissions** (key icon).

- \_\_ 3. Click Edit Role for the User role. Employees and Managers have User Privileges to this page. The roles are inherited from the parent page, Human Resources, which were changed in the previous section.
- 4. Go back to Employee Self Service.
- \_\_\_ 5. Click **Edit Role** for the *Privileged User* role. No entries are displayed because roles are inherited
- \_\_\_ 6. Click **Add** and search for User Groups, search by All Available, and click **Search**.

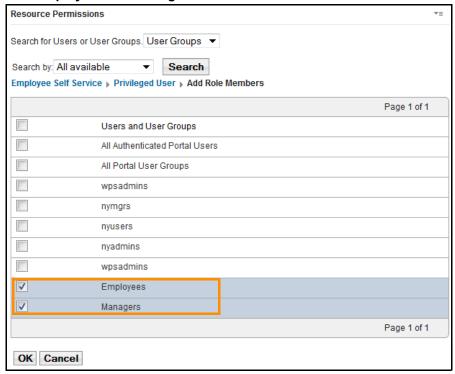


Information

#### Adding personal customization ability

Employee Self-Service page permissions are inherited from its parent, Human Resources. Employee Self-Service begins with one portlet, and based on the access that is set in the previous task, changes cannot be made. Any member of the Employees and Managers role can make personal customizations to the Employee Self-Service page by adding them to the Privileged User role.

7. Select Employees and Managers.



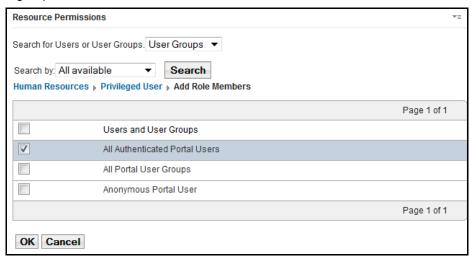
- \_\_\_ 8. Click **OK**.
- \_\_\_ 9. Go back to the **Employee Self-Service** page and click **Done** to complete the changes.

### Creating an inheritance block

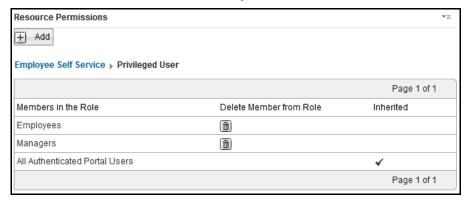
Because of inheritance, if permissions are changed on the parent page, Human Resources, they are also changed on the child page, Employee Self Service. Preventing role inheritance, also known as "role blocking", prevents the child page from automatically inheriting the same permissions as the parent.

Create an inheritance block by completing the following steps.

- \_\_ 1. Click **Home** in the breadcrumb trail, and for the Human Resources page, click the **Set Page Permissions** icon.
- \_\_ 2. Click Edit Role for Privileged User and click Add to add the All Authenticated Portal Users group.

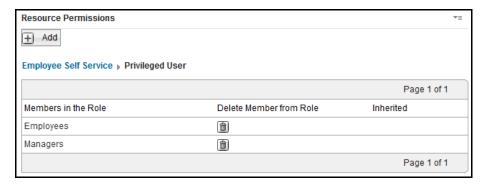


- Click OK.
- Click Human Resources and click Done.
- \_\_ 5. Click Human Resources and click the Set Page Permissions icon for the Employee Self-Service page.
- 6. Click the Edit Role icon for the Privileged User role.



Notice that the group, All Authenticated Portal Users, is inherited from the parent, Human Resources

- 7. Turn off Allow Inheritance for the role if it is not the intended behavior.
  - \_\_ a. Select Employee Self Service.
  - \_\_ b. Clear the **Allow Inheritance** check box for Privileged User.
  - \_\_ c. Click Apply and OK to confirm.
  - \_\_ d. Click the **Edit Role** icon for the Privileged User role.



Notice that the group, All Authenticated Portal Users, is no longer displayed.

- \_\_ e. Click **Employee Self Service** in the breadcrumb trail and click **Done**.
- \_\_ 8. Go to **Set Page Permissions** for Human Resources. Remove **All Authenticated Portal Users** from the Privileged User role.



- a. Click the **Delete** icon, and click **OK** to confirm.
- \_\_ b. Go back and click Done.
- \_\_ 9. Click **Log Out** and log back in using mjones for the User ID and IBMp0rtal for the password. The user mjones is a member of the Managers group.

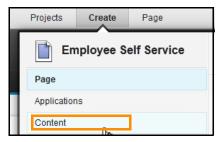
\_\_ 10. Go to the Employee Self-Service page.



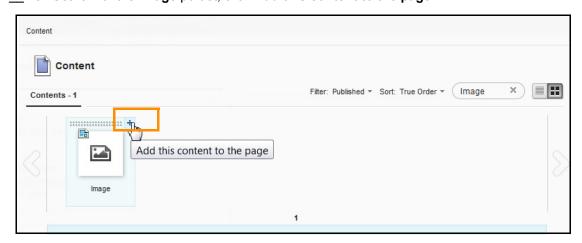
\_\_\_ 11. For the Edit Mode, click **ON** to activate editing.



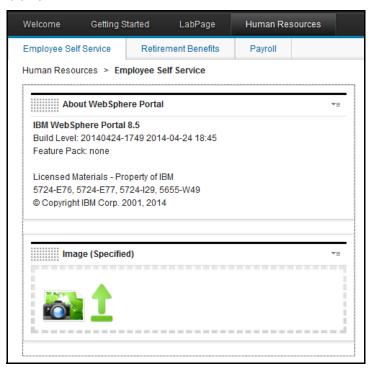
\_\_ 12. Click **Create** at the top of the page, and then click **Content**.



\_\_\_ 13. Search for the **Image** portlet, click **Add this content to the page**.



\_\_ 14. Close the Edit view.



- For Edit Mode, click OFF.
- 16. Log out and log back in by using lisa as the User ID and IBMpOrtal as the Password.
- \_\_\_ 17. Go to the **Employee Self-Service** page under the Human Resources tab.
- \_\_ 18. Notice that only the About WebSphere Portal portlet is on the page. Privileged User permissions are applied to the Employee Self-Service page, which allows users to individually customize the page. Therefore, in this example, only the user Mike Jones can see the Image portlet.
- \_\_ 19. Log out and log back in as wpsadmin.

# Section 6: Setting and verifying portlet permissions

You applied permissions to pages in the previous sections. In this task, you set up portlet permissions.

- \_\_\_ 1. Add the Calculator portlet to the Retirement Benefits page.
  - \_\_ a. Open the administrative menu, and click **Portal User Interface >** Click **Manage Pages** > **Content Root > Human Resources**.
  - \_\_ b. Click the **Edit Page Layout** icon (pencil icon) for the Retirement Benefits page.
  - c. Click Add Portlets.
  - \_\_ d. In the Edit Layout window, search for **Calculator**. Then, select the Calculator portlet check box and click **OK**. Click **Done**.

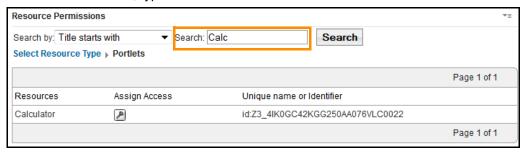
- 2. Click the Open site menu icon, and click Home > Human Resources > Retirement Benefits. The Calculator portlet is available on the Retirement Benefits page.
- \_\_ 3. Log out and log back in as lisa or mjones. Go to the **Retirement Benefits** page. The Calculator portlet is not available for either user ID.
- \_\_\_ 4. Log out and log back in as wpsadmin.

### Granting permissions to a portlet

Access is granted only to the ID that is used when portlet applications are initially installed, which, in this case, is wpsadmin. Permissions must be granted to the portlet for other user IDs to have access to it.

Grant permissions to a portlet by using the following steps.

- 1. Open the administrative menu, and click Access > Resources Permissions > Portlets.
- 2. In the Search field, type Calculator and click Search.



- Click the Assign Access icon (the key icon) for the Calculator resource.
- \_\_\_ 4. Click the **Edit Role** icon for some of the roles. Notice that Administrator is the only role for which permissions are assigned.
- 5. Click the **Edit Role** icon for the User role. Add **Managers** and click **OK**.
- 6. Click Calculator in the breadcrumb trail.
- 7. Click **Apply**, click **OK** to confirm.
- \_\_ 8. Log out, and log in as mjones to verify that the user Mike Jones now has permission to view the Calculator portlet on the Retirement Benefits page.

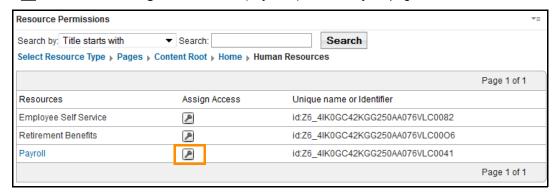
## Section 7: Configuring traversal permissions

In this section, you configure traversal permissions. With traversal permissions, you bridge two resources across an object without giving access to that object. Users gain implicit rights to browse all resources in a page hierarchy based on permissions that are assigned in the parent.

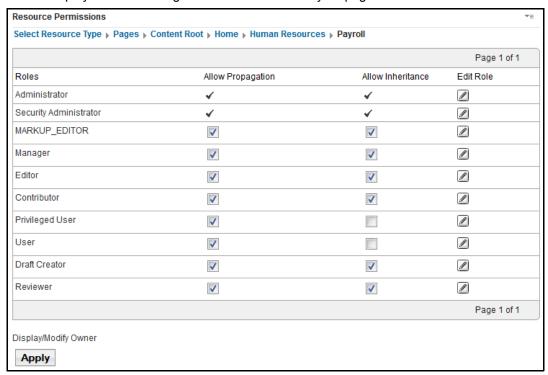
You want all employees to have access to the Human Resources hierarchy, with the exception that only managers have access to the Payroll page. Employees need a way to access between the Human Resources page and the Hourly page without accessing the Payroll page, which is traversal permissions. See the Human Resources page hierarchy diagram at the beginning of Section 2.

Configure traversal permission by completing the following steps.

- Limit access to the Payroll page.
  - \_\_a. Log in as wpsadmin.
  - \_\_ b. Open the administrative menu, and click **Access > Resource Permissions**.
  - \_\_ c. Click Pages > Content Root > Home > Human Resources.
  - \_ d. Click the **Assign Access** icon (key icon) for the Payroll page.



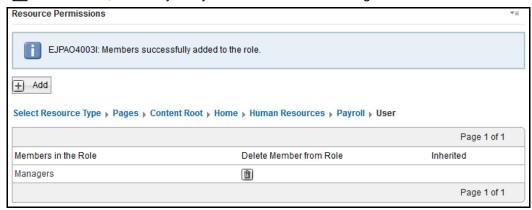
\_\_ e. Clear the Allow Inheritance check box for the User and Privileged User roles, which stops inheritance from the parent, Human Resources. Human Resources allows the Employees and Managers roles to view the Payroll page.



\_\_f. Click Apply and then click OK when asked to confirm. The message Propagation/Inheritance modified successfully displays if the confirmation was successful.
\_\_2. Verify that only wpsadmin has access to the Payroll page currently.
\_\_a. Open the site menu (globe), and click Home > Human Resources and expand Payroll.
b. Click Log Out and log back in as mjones. Select Human Resources. The Payroll page



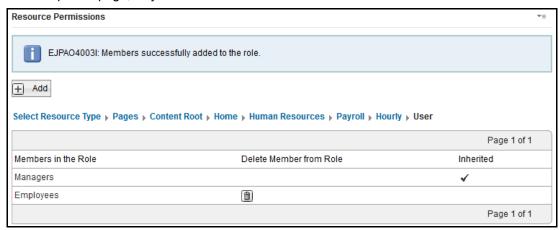
- c. Log out and log back in as wpsadmin.
- \_\_ 3. Go back to Payroll Resource Permissions.
  - \_\_ a. Open the site menu (globe), and click **Access > Resource Permissions**.
  - \_\_ b. Click Pages > Content Root > Home > Human Resources.
- \_\_ 4. Add Managers to the User role.
  - a. Click the Assign Access icon for the Payroll page.
  - b. Click the **Edit Role** icon for the *User* role.
  - \_\_ c. Click **Add**, search for **Managers**, and check the box for Managers.
  - d. Click **OK**, and verify that you see the success message.



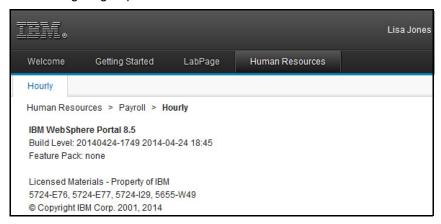
- 5. Verify that Lisa and Mike have access to the Payroll page and its children.
  - a. Log out and log back in as mjones.
  - b. Click the **Human Resources** page. Notice that Mike has access to the Payroll page, and also the Salary and Hourly pages. The permissions for these pages were inherited from the parent page, Payroll.
  - \_\_ c. Log out and log back in as lisa.

d.	Go to the <b>Human Resources</b> page. Notice that Lisa cannot access the Payroll page
	because the inherited permission for Employees group has no access.

- \_\_e. Log out and log back in as wpsadmin.
- \_\_\_ 6. Configure traversal permissions.
  - \_\_ a. Open the site menu (globe), and click **Access > Resource Permissions**.
  - \_\_ b. Click Pages > Content Root > Home > Human Resources > Payroll.
  - \_\_ c. Click the **Assign Access** icon for the Hourly page.
  - \_\_ d. Add the **Employees** group to the *User* role. The Managers group was inherited from the parent page, Payroll.



- \_\_ e. Verify that you see the success message.
- \_\_\_ 7. Verify the traversal permissions. Recall that Lisa is a member of the Employees group.
  - \_\_ a. Log out and log back in as lisa.
  - \_\_ b. Go to the **Human Resources** page. Notice that Lisa can see Payroll as a title. Expand **Payroll** and notice that Lisa has access to the Hourly page only. Lisa does not have access to the Salary page. Mike has access to the Salary page because he is a member of the Managers group.



\_\_ c. Log out and log back in as wpsadmin.

# **End of exercise**