



Entitlements Guide

Version 2004.5, Rev A

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What's New in this Release

The following changes have been introduced in Entitlements Version 2004.5, Rev A:

Topic	Description
Resources Maintenance	This chapter has been removed as the Resources privilege item has been removed from the product. The Resources item has been removed from the product because the privileges related data that it enabled the user to create was not fully utilized by the server side processes in evaluating user entitlements.
Services Maintenance	This chapter has been removed as the Services functionality has been removed from the product. The Services item has been removed from the product because the privileges related data that it enabled the user to create was not fully utilized by the server side processes in evaluating user entitlements.
Privilege Maintenance	Resources and Services have been removed from the Privilege Maintenance sections as these items have been removed from the product.

The following changes have been introduced in Entitlements Version 2004.5:

Topic	Description
References to the ID fields have been removed from the guide.	References to the fields TaskID, ServiceID, RoleID, ResourceID, LimitID and ChannelID have been removed from the guide as these fields have been removed from the Entitlements front-end. These fields are still used in Entitlements but are not displayed on the front-end as they are not relevant to users.
References to the Assign Group, Assign Privilege and Assign Role buttons have been amended to reflect the functionality.	The Assign Group button has been re-labeled as Assign\Unassign Group, the Assign Privilege button has been re-labeled as Assign\Unassign Privilege and the Assign Role button has been re-labeled Assign\Unassign Role, to reflect the functionality.

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Using Entitlements

Siebel Retail Finance Entitlements is a GUI-based application for administering (make this change globally throughout the book) the banking application user entitlements including users, user groups, roles and privileges. Siebel Retail Finance Entitlements is used in conjunction with the Branch Teller Administration Console for administering the Branch Teller application users. Please consult the Branch Teller Guide for details of the Branch Teller Administration Console functionality.

This chapter is divided into the following main sections:

- Concepts and Terms Related to Entitlements
- Maintaining Users
- Maintaining User Groups
- Maintaining Roles
- Maintaining Privileges
- Maintaining Channels
- Maintaining Tasks
- Maintaining Limits

Concepts and Terms Related to Entitlements

Siebel Retail Finance Entitlements is an RBAC (Role Based Access Control) application enabling administration of the banking application user entitlements. In the Entitlements framework users or user groups are assigned roles. The privileges assigned to the role control the functionality and data to which the user or user group has access.

The following are the main components used in the Entitlements framework:

- Users: individual users of the banking application such as a bank teller, branch manager or internet banking self-service customer.
- User Groups: flexible groupings of users. A user group can contain one or more members. A user can belong to zero or more groups.
- Roles: users and groups are assigned roles whose assigned privileges control the functionality and data to which they have access.
- Privileges: a privilege or entitlement describes the action that is being controlled. A user can perform the action of the privilege once their role has been assigned the privilege. A privilege can be made up of one or more of the following privilege items:
 - Task: holds details of the action that is to be carried out, for example funds transfer or supervisor override.

- Limit: a limit value can be imposed on a privilege such as a maximum amount that can be transferred. It can be an upper or a lower limit.
- Channel: the method of access to the system. Examples of channels include Internet Banking and Branch.

Maintaining Users

The user maintenance operations include the following:

- Search for a specific user account or retrieve all users.
- View user details and view delegate user details.
- Add, amend or delete a user or delegate user.
- Reset user logon tries if the user exceeds the allowed number of login attempts.
- Assign or un-assign a Role to or from a user or delegate user.
- Assign or un-assign a user to or from a user group.
- Lock or unlock a user account and change user password.

Viewing Users and Delegate Users

To search for a specific user or delegate user, enter the search criteria below and click the search button. To view a listing of all users or delegate users, select the search button without entering search criteria.

To view a user or delegate user

- 1 Navigate to the Actor Search screen.
- 2 Enter or select the user name, logon name, actor type or select the locked check-box.
- 3 Select the search button.

The Actor Search Results screen displays the name, logon name, actor type and locked status for each user returned.

Viewing User and Delegate User Details

To view user or delegate user details, the view user or delegate user task must first be executed so that the current active screen is the Actor Search Results screen.

To view user or delegate user details

- 1 Navigate to the Actor Search Results screen.
- 2 Select the user or delegate user row for which details are to be viewed.

- 3 Select the View Details button.

The Actor Details screen appears.

Viewing User Privileges

To view the Privileges that have been assigned to a user, the view user or delegate user task must first be executed so that the current active screen is the Actor Details screen.

To view user privileges

- 1 Navigate to the Actor Details screen.
- 2 Select the View Privileges button.

The Privileges of that user are then displayed on the Privileges screen.

Viewing User Roles

To view the Roles assigned to a user or delegate user, the view user or delegate user task must first be executed so that the current active screen is the Actor Details screen.

To View user roles

- 1 Navigate to the Actor Details screen.
- 2 Select the View Actor Roles button.

The Role Details screen is then launched displaying the role name and role type.

Viewing User Groups

To view the Groups to which the user has been assigned, the view user or delegate user task must first be executed so that the current active screen is the Actor Details screen.

To view user groups

- 1 Navigate to the Actor Details screen.
- 2 Select the View Actor Groups button.

The Actor Groups to which the user has been assigned are then displayed on the Actor Groups screen.

Adding a User

To add a user, the view user or delegate user task must first be executed so that the current active screen is the Actor Search Results screen.

To add a user

- 1 Navigate to the Actor Search Results screen.
- 2 Select the Add button. The Add or Amend Actor Details screen is then launched.
- 3 Enter the user details on the Add or Amend Actor Details screen.
- 4 Select the Submit button.

Amending a User Record

To amend a user record, the view user or delegate user task must first be executed so that the current active screen is the Actor Search Results screen.

To amend a user record

- 1 Navigate to the Actor Search Results screen.
- 2 Select the record to be amended on the Actor Search Results table.
- 3 Select the Amend button. The Add or Amend Actor Details screen is then launched.
- 4 Amend the required fields on the Add or Amend Actor Details screen.
- 5 Select the Submit button.

Resetting a User's Logon Tries

If the user's logon tries exceed the number allowed then the Reset Logon Tries button is enabled. To reset the user's logon tries to zero, the view user or delegate user task must first be executed so that the current active screen is the Actor Details screen.

To reset a user's logon tries

- 1 Navigate to the Actor Details screen.
- 2 Select the Reset Logon Tries button.

Deleting a User Record

To delete a user record, the view user or delegate user task must first be executed so that the current active screen is the Actor Search Results screen.

To delete a user record

- 1 Navigate to the Actor Search Results screen.
- 2 Select the user record on the Actor Search Results table which is to be deleted.
- 3 Select the Delete button.

The system checks if the user or delegate user has been assigned to any actor groups and removes any assignments. The system checks if any roles have been assigned to the user or delegate user and if they have it un-assigns them. The system then deletes the user or delegate user.

Assigning a Role to a User

To assign a Role to a user, the view user or delegate user task must first be executed so that the current active screen is the Actor Search Results screen.

To assign a role to a user

- 1 Navigate to the Actor Search Results screen.
- 2 Select the user or delegate record which is to be assigned a Role.
- 3 Select the Assign or Un-assign button. The Assign Role To Actor screen is then launched.
- 4 Select the Role from the Unassigned Roles list which is to be assigned to the user or delegate.
- 5 Select the right arrow button.
- 6 Select the Submit button.

Un-Assigning a Role from a User

To un-assign a Role from a user, the view user or delegate user task must first be executed so that the current active screen is the Actor Search Results screen.

To un-assign a role from a user

- 1 Navigate to the Actor Search Results screen.
- 2 Select the user or delegate record which is to be un-assigned a Role.
- 3 Select the Assign or Un-assign button. The Assign Role To Actor screen is then launched.
- 4 Select the Role from the Assigned Roles list which is to be un-assigned from the user or delegate.
- 5 Select the left arrow button.
- 6 Select the Submit button.

Assigning a User to a User Group

To assign a user or delegate user to a user group, the view user or delegate user task must first be executed so that the current active screen is the Actor Search Results screen.

To assign a user to a user group

- 1 Navigate to the Actor Search Results screen.
- 2 Select the user or delegate user record which is to be assigned to a user group.
- 3 Select the Assign To Actor Group button. The Assign Actor To Actor Group screen is then launched.

- 4 Select the User Group from the Unassigned Groups list to which the user is to be assigned.
- 5 Select the right arrow button.
- 6 Select the Submit button.

Un-assigning a User from a User Group

To un-assign a user or delegate user from a user group, the view user or delegate user task must first be executed so that the current active screen is the Actor Search Results screen.

To un-assign a user from a user group

- 1 Navigate to the Actor Search Results screen.
- 2 Select the user or delegate user record which is to be un-assigned from a user group.
- 3 Select the Assign To Actor Group button. The Assign Actor To Actor Group screen is then launched.
- 4 Select the User Group from the Assigned Groups list from which the user is to be un-assigned.
- 5 Select the left arrow button.
- 6 Select the Submit button.

Viewing the Delegates of a User

To view the delegates of a user, the view user or delegate user task must first be executed so that the current active screen is the Actor Search Results screen.

To view the delegates of a user

- 1 Navigate to the Actor Search Results screen.
- 2 Select the user on the Actor Search Results table for which delegates are to be viewed.
- 3 Select the View Delegates button.

The Delegates screen is then launched.

Viewing Delegate Details

To view the details of a Delegate User record, the view delegates of a user task must first be executed so that the current active screen is the Delegates screen.

To view delegate details

- 1 Navigate to the Delegates screen.
- 2 Select the Delegate user row for which details are to be viewed.
- 3 Select the View Details button.

The View Delegate Details screen is then launched.

Adding a Delegate User

To add a Delegate User, the view delegates of a user task must first be executed so that the current active screen is the Delegates screen.

To add a delegate user

- 1 Navigate to the Delegates screen.
- 2 Select the Add button. The Add or Amend Delegate Details screen is then launched.
- 3 Complete the delegate details.
- 4 Select the Submit button.

Amending Delegate Details

To amend a Delegate record, the view delegates of a user task must first be executed so that the current active screen is the Delegates screen.

To amend a delegate record

- 1 Navigate to the Delegates screen.
- 2 Select the record to be amended on the View Delegates table.
- 3 Select the Amend button. The Add or Amend Delegate Details screen is then launched.
- 4 Amend the required fields.
- 5 Select the Submit button.

Deleting a Delegate User

To delete a Delegate User, the view delegates of a user task must first be executed so that the current active screen is the Delegates screen.

To delete a delegate user

- 1 Navigate to the Delegates screen.
- 2 Select the user record on the View Delegates table which is to be deleted.
- 3 Select the Delete button.

The system checks if the Delegate User has been assigned to any user groups and removes any assignments. The system checks if any roles have been assigned to the Delegate User and removes any assignments. The system then deletes the Delegate.

Assigning a Role to a Delegate

To assign a Role to a Delegate, the view delegates of a user task must first be executed so that the current active screen is the Delegates screen.

To assign a role to a delegate

- 1 Navigate to the Delegates screen.
- 2 Select the Delegate record which is to be assigned a Role.
- 3 Select the Assign or Un-assign button. The Assign Role To Delegate screen is then launched.
- 4 Select the Role from the Unassigned Roles list which is to be assigned to the Delegate.
- 5 Select the right arrow button.
- 6 Select the Submit button.

Un-assigning a Role from a Delegate

To un-assign a Role from a Delegate, the view delegates of a user task must first be executed so that the current active screen is the Delegates screen.

To un-assign a role from a delegate

- 1 Navigate to the Delegates screen.
- 2 Select the Delegate record which is to be un-assigned a Role.
- 3 Select the Assign or Un-assign button. The Assign Role To Delegate screen is then launched.
- 4 Select the Role from the Assigned Roles list which is to be un-assigned from the Delegate.
- 5 Select the left arrow button.
- 6 Select the Submit button.

Locking a User Account

The Lock button is enabled when a User record in the table is selected. If the selected User record is unlocked then the button reads 'Lock'. If the selected User record is locked then the button reads 'Unlock'. To lock a user, the view user or delegate user task must first be executed so that the current active screen is the Actor Search Results screen.

To lock a user account

- 1 Navigate to the Actor Search Results screen.
- 2 Select the user or delegate record on the Actor Search Results table which is to be locked.
- 3 Select the Lock button.

Unlocking a User Account

The Unlock button is enabled when a User record in the table is selected. If the selected User record is unlocked then the button reads 'Lock'. If the selected User record is locked then the button reads 'Unlock'. To unlock a user, the view user or delegate user task must first be executed so that the current active screen is the Actor Search Results screen.

To unlock a user account

- 1 Navigate to the Actor Search Results screen.
- 2 Select the user or delegate record on the Actor Search Results table which is to be unlocked.
- 3 Select the Unlock button.

Changing a User's Password

To change a user's password

- 1 Navigate to the Change Password screen. The system displays the user logon name.
- 2 Enter the Existing Password, New Password, Confirm New Password. All fields are mandatory.
- 3 Select the Submit button.

The system verifies that the Existing Password entered matches that stored against the current user and that both new entered passwords match.

Maintaining User Groups

The User Group maintenance operations include:

- View User Groups.
- View Roles assigned to a specific User Group.
- Assign a Role to or from a User Group.
- Add, amend or delete a User Group.

To delete a User Group, the system first checks if any Users have been assigned to the User Group and un-assigns any which have been assigned. The system checks if any Roles have been assigned to the User Group and un-assigns any roles which have been assigned. The User Group is then deleted.

Viewing User Groups

This task displays all user groups set up on the system. To view user groups, navigate to the Actor Groups screen by selecting Actor Groups on the Entitlements left navigation menu. The Actor Groups screen is then launched displaying the group name and group status for each group.

Viewing Roles Assigned to a User Group

To view the roles assigned to a user group, the view user groups task must first be executed so that the current active screen is the Actor Groups screen.

To view the roles assigned to a user group

- 1 Navigate to the Actor Groups screen.
- 2 Select the User Group on the Actor Groups table for which Roles are to be viewed.
- 3 Select the View Roles button.

The Role Details screen is then launched.

Assigning a Role to a User Group

To assign a role to a user group, the view user groups task must first be executed so that the current active screen is the Actor Groups screen.

To assign a role to a user

- 1 Navigate to the Actor Groups screen.
- 2 Select the user group which is to be assigned or un-assigned a Role.
- 3 Select the Assign/Unassign Role button. The Assign Role to Actor Group screen is then launched.
- 4 Select the Role from the Unassigned Roles list which is to be assigned to the User Group.
- 5 Select the assign button which is the right arrow button.
- 6 Select the Submit button.

Un-assigning a Role from a User Group

To un-assign a role from a user group, the view user groups task must first be executed so that the current active screen is the Actor Groups screen.

To un-assign a role from a user

- 1 Navigate to the Actor Groups screen.
- 2 Select the user group which is to be un-assigned a Role.
- 3 Select the Assign/Unassign Role button. The Assign Role to Actor Group screen is then launched.
- 4 Select the Role from the Assigned Roles list which is to be un-assigned from the User Group.
- 5 Select the un-assign button which is the left arrow button.
- 6 Select the Submit button.

Adding a User Group

To add a User Group to the system, the view user groups task must first be executed so that the current active screen is the Actor Groups screen.

To add a user group

- 1 Navigate to the Actor Groups screen.
- 2 Select the Add button. The Add or Amend Actor Group screen is then launched.
- 3 Enter an Actor Group Name.
- 4 Select the Actor Group Status from the drop-down menu.
- 5 Select the Submit button.

Amending a User Group

To amend a User Group record, the view user groups task must first be executed so that the current active screen is the Actor Groups screen.

To amend a user group

- 1 Navigate to the Actor Groups screen.
- 2 Select the User Group record on the Actor Groups table which is to be amended.
- 3 Select the Amend button on the Actor Groups screen. The Add or Amend Actor Group screen is then launched.
- 4 Amend the required field(s). The Actor Group Name and Status fields are amendable.
- 5 Select the Submit button.

Deleting a User Group

To delete a User Group, the view user groups task must first be executed so that the current active screen is the Actor Groups screen.

To delete a user group

- 1 Navigate to the Actor Groups screen.
- 2 Select the User Group record on the Actor Groups table which is to be deleted.
- 3 Select the Delete button.

The system checks if any Users have been assigned to the User Group. Any Users which have been assigned will be un-assigned. The system checks if any Roles have been assigned to the User Group. Any Roles which have been assigned will be un-assigned. The User Group is then deleted.

Maintaining Roles

The Roles maintenance operations include the following:

- View Role details.
- View the Privileges assigned to a specific Role.
- Create Role.
- Assign or un-assign Privileges to or from Role.
- Add a Role.
- Amend a Role name.
- Delete a Role.

Before deleting a Role the system first un-assigns the Role from any User, User Group or Privilege that it has been assigned to.

Viewing Roles

This task displays all roles set up on the system. To view the existing roles, navigate to the Role Details screen by selecting Roles on the Entitlements left navigation menu. The Role Details screen is then launched displaying the role name and role type for each role.

Viewing the Privileges Assigned to a Role

To view all the privileges assigned to a specific Role, the view roles task must first be executed so that the current active screen is the Role Details screen.

To view the privileges assigned to a role

- 1 Navigate to the Role Details screen.
- 2 Select the Role record for which to retrieve Privilege details on the Role Details table.
- 3 Select the View Privileges button.

The Privileges assigned to the specified Role are retrieved and displayed. Refer to the Privileges Maintenance chapter for more details.

Adding a Role

To create a new Role, the view roles task must first be executed so that the current active screen is the Role Details screen.

To add a role

- 1 Navigate to the Role Details screen.
- 2 Select the Add button. The Add/Amend Role screen is then launched.

- 3 Select the Add button.
- 4 Enter a Role Name.
- 5 Select a Role Type from the drop-down menu.
- 6 Select the Submit button.

Amending a Role

To amend a Role Name, the view roles task must first be executed so that the current active screen is the Role Details screen.

To amend a role

- 1 Navigate to the Role Details screen.
- 2 Select the Role to amend.
- 3 Select the Amend button. The Add/Amend Role screen is then launched.
- 4 Make the required amendments, only the Role Name field is amendable.
- 5 Select the Submit button.

Assigning Privileges to a Role

To assign privileges to a specific role, the view roles task must first be executed so that the current active screen is the Role Details screen.

To assign privileges to a role

- 1 Navigate to the Role Details screen.
- 2 Select the Role record on the Role Details table which is to be assigned privileges.
- 3 Select the Assign/Unassign Privilege button. The Assign Privilege to Role screen is then launched.
- 4 Select the Privilege from the Un-assigned Privileges list which is to be assigned to the Role.
- 5 Select the assign button which is the right arrow button.
- 6 Repeat steps 4 and 5 for each privilege that is to be assigned.
- 7 Select the Submit button.

Un-assigning Privileges from a Role

To un-assign privileges from a specific role, the view roles task must first be executed so that the current active screen is the Role Details screen.

To un-assign privileges from a role

- 1 Navigate to the Role Details screen.
- 2 Select the Role record on the Role Details table which is to be un-assigned privileges.

- 3 Select the Assign/Unassign Privilege button. The Assign Privilege to Role screen is then launched.
- 4 Select the Privilege from the Assigned Privileges list which is to be un-assigned from the Role.
- 5 Select the un-assign button which is the left arrow button.
- 6 Repeat steps 4 and 5 for each privilege that is to be un-assigned.
- 7 Select the Submit button.

Deleting a Role

To delete a Role, the view roles task must first be executed so that the current active screen is the Role Details screen.

To delete a role

- 1 Navigate to the Role Details screen.
- 2 Select the Role record on the Role Details table which is to be deleted.
- 3 Select the Delete button.

The system checks if the Role has been assigned to any user, actor group or privilege. If it has then the assignments are deleted. The system then deletes the Role.

Maintaining Privileges

The Privilege Maintenance operations include the following:

- View Privileges.
- Revoke Privilege from all Users irrespective of the Role of any User.
- Restore a Privilege to all Users who had the Privilege before it was revoked.
- Add, assign and delete a Privilege.

The Revoke Privilege from all Users task is to cater for situations where some services, for example, funds transfer, need to be blocked.

When a Privilege is created it is assigned one or more of the following privilege items:

- Task: holds details of the action that is to be carried out, for example, funds transfer.
- Limit: a limit value can be imposed on a privilege such as a maximum amount that can be transferred. The Limit type can be, for example, daily, weekly or transactional.
- Channel: the method of access to a system can effect the access control requirements and it is this method of access which is described in the Channel field. Examples of Channels include internet and branch.

Viewing Privileges

To view all privileges set up on the system, select Privileges from the left navigation menu. The Privileges screen is then launched and the privilege description, task description, limit amount, limit

type, channel name and revoked status are displayed for each privilege set up on the system. Note: to view Privileges for a specific user or delegate user see the User Maintenance chapter.

Revoking a Privilege from all Users

To revoke a privilege from all users, the view privileges task must first be executed so that the current active screen is the Privileges screen.

To revoke a privilege from all users

- 1 Navigate to the Privileges screen.
- 2 Select the Privilege on the Privileges table which is to be revoked from all users.
- 3 Select the Revoke From All button.

Restoring a Privilege

To restore a privilege for all users who had the privilege before it was revoked, the view privileges task must first be executed so that the current active screen is the Privileges screen.

To restore a privilege

- 1 Navigate to the Privileges screen.
- 2 Select the Privilege on the Privileges table which is to be restored.
- 3 Select the Reinvoke Privilege button.

Adding a Privilege and Assigning a Privilege to all Roles

To create a general system privilege, the view privileges task must first be executed so that the current active screen is the Privileges screen.

Note to create a privilege for a specific user or delegate user the Privileges screen must be launched from the View Actor Details screen or the Amend Delegate Actor screen. Refer to the User Maintenance chapter for further details.

To create a Privilege

- 1 Navigate to the Privileges screen.
- 2 Select the Add button. The Add Privilege screen is then launched.
- 3 Enter a Privilege Description. This field is mandatory.
- 4 Populate one or more of the following fields, at least one field is mandatory: Task Description, Limit Amount, Limit Type and Channel Name.
- 5 Select the Submit button.
- 6 Select the Assign To All Roles button to assign the privilege to all existing roles.

The system verifies that a privilege of the same Task, Limit and Channel does not exist (if it does exist an error message is displayed). The system creates the new Privilege, generates a Privilege ID and sets the Privilege Type to general.

Deleting a Privilege

To delete a general Privilege, the view privileges task must first be executed so that the current active screen is the Privileges screen. A general privilege is a privilege which can be assigned to all users or user groups and which has not been created for a specific user or user group.

To delete a privilege

- 1 Navigate to the privileges screen.
- 2 Select the Privilege on the Privileges table which is to be deleted.
- 3 Select the Delete button.

The system checks if the Privilege has been assigned to any Role. If it has the assignments are deleted. The system then deletes the privilege.

For Privileges which were created for an individual user or delegate user (only applicable when the privileges screen is launched from a user or delegate user screen) the system checks instead if the individual Role of the privilege has any other individual privileges assigned to it. If it has not then the individual Role is unassigned from the user or delegate user. The individual Role is deleted and the Privilege is deleted. If the individual Role has other individual Privileges assigned to it then the individual Role is not deleted. The individual Privilege is then deleted.

Maintaining Channels

A Privilege can be made up of one or more of the following privilege items: Task, Limit and Channel. A privilege item is assigned to a Privilege when the Privilege is created.

The Channel privilege item describes the method by which a system is accessed, for example, internet or wireless. The Channel can affect the system access control requirements. Channel privilege maintenance operations include view, add and delete a Channel. To delete a Channel, the system initially determines any Privileges that the Channel has been assigned to, un-assigns those Privileges from any Roles they have been assigned to, deletes those Privileges and then deletes the Channel.

Viewing Channels

This task displays all channels set up on the system. To view the existing channels, navigate to the Channels screen by selecting Channels on the Entitlements left navigation menu.

Adding a Channel

To add a Channel, the view channels task must first be executed so that the current active screen is the Channels screen.

To add a channel

- 1 Navigate to the Channels screen.
- 2 Select the Add button. The Add Channel screen is then launched.
- 3 Enter the Channel Name.
- 4 Select the Submit button.

Deleting a Channel

To delete a Channel, the Channels screen by selecting Channels on the Entitlements left navigation menu.

To delete a channel

- 1 Navigate to the Channels screen.
- 2 Select the Channel which is to be deleted.
- 3 Select the Delete button.

The system initially determines any Privileges that the Channel has been assigned to, un-assigns those Privileges from any Roles they have been assigned to, deletes those Privileges and then deletes the Channel.

Maintaining Tasks

A Privilege can be made up of one or more of the following privilege items: Task, Limit and Channel. A privilege item is assigned to a Privilege when the Privilege is created.

The Task privilege item holds details of the action that is to be carried out. The Tasks maintenance operations include view, add and delete a Task. To delete a Task, the system initially determines any Privileges that the Task has been assigned to, un-assigns those Privileges from any Roles they have been assigned to, deletes those Privileges and then deletes the Task.

Viewing Tasks

This operation displays all tasks set up on the system. To view the existing tasks, navigate to the Tasks screen by selecting Tasks on the Entitlements left navigation menu.

Adding a Task

To add a Task, the view tasks operation must first be executed so that the current active screen is the Tasks screen.

To add a task

- 1 Navigate to the Tasks screen.

- 2 Select the Add button. The Add Task screen is then launched.
- 3 Enter the Task Description.
- 4 Select the Submit button.

Deleting a Task

To delete a Task, the view tasks operation must first be executed so that the current active screen is the Tasks screen.

To delete a task

- 1 Navigate to the Tasks screen.
- 2 Select the Task which is to be deleted.
- 3 Select the Delete button.

The system initially determines any Privileges that the Task has been assigned to, un-assigns those Privileges from any Roles they have been assigned to, deletes those Privileges and then deletes the Task.

Maintaining Limits

A Privilege can be made up of one or more of the following privilege items: Task, Limit and Channel. A privilege item is assigned to a Privilege when the Privilege is created.

A Limit value can be imposed on a privilege such as a maximum amount that can be transferred. The Limit Type can be, for example, daily, weekly or transactional. The Limits maintenance operations include view, add and delete a Limit. To delete a Limit, the system initially determines any Privileges that the Limit has been assigned to, un-assigns those Privileges from any Roles they have been assigned to, deletes those Privileges and then deletes the Limit.

Viewing Limits

This task displays all limits set up on the system. To view the existing limits, navigate to the Limits screen by selecting Limits on the Entitlements left navigation menu.

Adding a Limit

To add a Limit, the view limits operation must first be executed so that the current active screen is the Limits screen.

To add a limit

- 1 Navigate to the Limits screen.
- 2 Select the Add button. The Add Limit screen is then launched.

- 3 Enter or select the Limit Value, currency and Type.
- 4 Select the Submit button.

Deleting a Limit

To delete a Limit, the view limits operation must first be executed so that the current active screen is the Limits screen.

To delete a limit

- 1 Navigate to the Limits screen.
- 2 Select the Limit which is to be deleted.
- 3 Select the Delete button.

The system initially determines any Privileges that the Limit has been assigned to, un-assigns those Privileges from any Roles they have been assigned to, deletes those Privileges and then deletes the Limit.