

# PeopleSoft 9.2 Security HCM Functional

## Agenda

Developed specifically for PeopleSoft v9.2 HCM functional end users, HCM Security training quickly introduces students to the building blocks of PeopleSoft security. The goals of this class are achieved through a mixture of live PeopleSoft Security component walk-throughs and a hands-on exercise that allows students to apply security to a PeopleSoft HCM module as transactions are entered and processed.

## Prerequisites:

- PeopleSoft v9.2 Foundations (HCM)

## HCM Security Building Blocks

- Course Introduction
- Overview of PeopleSoft Security
- Permission Lists
  - Pages used to define Permission Lists
  - General Permissions
  - Pages Permissions
  - PeopleTools Permissions, Process Permissions
  - Query Permissions, Access Groups and Query Profiles
- Roles
  - Pages used to define Role Options
  - General Role Tab
  - Assigning Permission Lists to Roles
  - Members for a Role, Workflow Routing Options and Role Grants
- User Profiles
  - Pages Used to Specify User Profile Attributes
  - General, User ID and Roles
  - Workflow

## HCM Security Building Blocks (cont'd)

- Row-Level Security
  - Business Unit
  - By User ID or Permission List
- User Preferences
  - Overall
  - Modular
- System-wide Options
  - Password Controls and Query Access Manager
  - Sample Process Flow for Security Requests
  - Security Strategy and Considerations
- Review and Exercise
  - Viewing and/or Creating Roles with delivered Permission Lists
  - Assigning Roles to User Profiles

## HCM Security Exercise

Create a new HCM user with the following requirements:

1. User has access to Job Data (Workforce Admin > Job Info > Job Data)
  - a. All pages except salary Plan
  - b. All available actions in each page except no correction in Work Location
2. Only see employees in department 44400 (use the SHARE tree)
3. Only see Recruits and Job Openings for business unit US001 (assume already have page access, just configure row level sec)
4. North America global security
5. Does not want to receive workflow emails
6. Timekeeper for all employees in the KUELM group with ability to create new dynamic groups using the JOB table
7. Create public queries using the DEPT\_TBL table
8. Other users can see this user's processes in the Process scheduler but cannot cancel them
9. Ability to run the Portal Sync process (PeopleTools > Portal > Portal Security Sync)
10. Will be executing a process in FSM that invokes the 3 Cs Trigger Component Interface web service communication to HCM
11. Alan Costello will be handling this user's workflow responsibilities in November

Additional instructions:

- Create only in HCM, not FSM
- There are some not-so-obvious non page permissions that all users must have to access the system. For this exercise grant your user the PeopleSoft User and EOPP\_USER roles to make sure they are included
- For this exercise minimize the number of custom roles and perm lists you create
- This employee's name is Nicole Cage
- If any required info is missing from the list above, model after user C10001
- Always a good idea to design the solution before you build
- Any user running the Portal Sync process must have either the PeopleSoft Administrator or Portal Administrator role in their profile
- If you get stuck use the training materials or PeopleBooks!

**BONUS REQUIREMENT:** This user should not have access to the Bargaining and union fields on the Job Labor page in Job Data