PeopleSoft Dynamic Roles

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Dynamic Roles

- Why would you want to use them?
- How do they work?
- Steps needed to create them
- Gotchas
- Summary
Why would you want to use a Dynamic Role

- It allows PeopleSoft to automatically give a User a permission
- The permission is assigned as soon as the person is returned in the query
- The query that is created determines the parameters that must be met
- System handles the updating and runs on a schedule
How do Dynamic Roles work?

- First thing you have to do is create a query
- If the Record you are trying to use is not a PeopleSoft Record you have to add the Record to the Tree to be able to create a Query
- Make the Query of type ROLE (remember this when you want query on it once it is created)
- The result set of the query must be OPRID
- There must not be another USER Query or Private Query of the same name
- There must not be any bind variables or parameters for the Query
- Assign your Dynamic Role Query to a Role
Create a New Query
If you search and your record is not there then you will have to go out and add the record
The Tree that was created to house the Sandia Records is SL_RECORDS
Insert record name here and add the record.
Then go back to Query Manager and your record will be present
Once you create a Query and you go back to Query Manager to find
the query you have to do an advanced find for a Role Query
Note: Change Query type to ROLE
Create a query using EMPLID as the key to define and limit but the result set must be OPRID
There must not be another USER Query or Private Query of the same name. There must not be any bind variables or parameters for the Query.
Assign your Dynamic Role Query to a Role
Test the Dynamic Query by deleting members and Execute Rule

When you Delete you will notice that nothing happens, you need to refresh to see an updated list. Same is true for Test Rule, you need to go to Process Monitor and see it execute. I currently have this scheduled to run at 1 am so you may need to change recurrence if you want it to run immediately.
If the Dynamic Role is to limit access to a Menu or Page assign the Role to the Page level.
By creating a Permission List, assign the menu that the pages belong to and show the permissions.
### Page Permissions

#### SL_VUSER_MENU::Pensions/Pension Calculator

<table>
<thead>
<tr>
<th>Pages</th>
<th>Customized</th>
<th>audited</th>
<th>Authorized</th>
<th>Updated On</th>
<th>Group Only</th>
<th>Available Only</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Options:**
- [X] All
- [X] Updated/Display
- [X] Updated/Display/All
- [X] Updated/Display/All/Next

**Buttons:**
- OK
- Cancel
It will then be displayed in the Portal
### PeopleSoft Security

#### Content Reference Security

**Label:** Portlet Calculator

The permissions for the component or script this content reference points to control its permissions. To change these component or script permissions, click on the "View Definition" link for the appropriate permission list.

<table>
<thead>
<tr>
<th>Permission List</th>
<th>Name</th>
<th>Type</th>
<th>View Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 PermissionList</td>
<td>Name</td>
<td>Type</td>
<td>View Definition</td>
</tr>
<tr>
<td>2 PermissionList</td>
<td>Name</td>
<td>Type</td>
<td>View Definition</td>
</tr>
<tr>
<td>3 PermissionList</td>
<td>Name</td>
<td>Type</td>
<td>View Definition</td>
</tr>
</tbody>
</table>

### Selected Security Authorizations

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>View Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>User 1</td>
<td>User 1 details</td>
<td>View Definition</td>
</tr>
</tbody>
</table>

### General Security
Schedule update of Dynamic List each evening and to update who is notified in case of failure.

Notice this is asking for Process Type not name, so do an advanced Search.
When you run it schedules two jobs one at the run time and one at the scheduled time.
Note it is set to Recurrence Name: DAILY-PENSION
To Change this you can click on the magnifying glass, but if you do not have a Recurrence set up you will not see it in the list
To create a Recurrence do the following:
Make the settings you like based on days and times
On the Notification Page of the Process Scheduling add the User that you want notified in case of failure or success. Mark the messages you would like to receive. Now test by hiring and terminating an employee, moving an employee through employee types and make certain your Dynamic list updates at the time it is scheduled.
Gotchas

- If you assign the role manually vs. letting the system do it dynamically the Application Engine that updates will stop working.
- Query to check:
The message PeopleCode can be run manually from the Application Designer. First, open the message ROLESYNCH_MSG.
Run PeopleCode

Right click on Write RoleUser to Database and select Run PeopleCode.
PeopleCode Options

Enter valid publication ID. You can reuse values from the message monitor. PeopleCode will run in the background before finishing and displaying the results.
PeopleCode Completion
Questions and Answers

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