ALLN02
Self Training Guide
for DSAs

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ALLN01 is the name of the “old” financial application on Com-Plete.

ALLN02 is the name of the “new” financial application on the GMC.

**Logging In & Accessing Assignments**

The Login link for production:  
https://gateway.procurement.ucsb.edu/gmc

The Login link for test system:  
https://gateway.test.procurement.ucsb.edu/gmc/Home.aspx

1. Login with your UCSBnetID & password where indicated.

2. The welcome screen is displayed:
You may have used the GMC for Gateway, so the look and flow of the application may be familiar.

3. Click "Assignments" (these are the functions to view, add, edit, delete, etc).

4. This brings up your "main menu"; these functions are the core of your DSA duties.

5. First off, you can just ignore "Assignments by Role" as that is NOT applicable to any ALLN02 functions.
Manage Assignments

So start testing by clicking "Manage Assignments". One way to understand this function is that it is a way to view existing assignments (and to unassign [hence remove their permissions] them as well).

It is not used to add a brand new user, or to add new roles to an existing user (that function is available under "Assignments by User", discussed later).

Any of the 'white' fields can be filled out for this display. Ignore the greyed fields, you cannot fill them in.

If you are a DSA for one and only one department, you will see all entries for your department displayed in the table. If you are a DSA for multiple departments, you will see everyone as well, but the departments will be intermixed.

HINT: I selected CCTR-COMPUTER CENTER, and clicked Search. I find it easier to manage assignments one department at a time.

I'm a DSA for two departments (CCTR and INFO), and those departments are in my Department pull down, and yours will be as well.

You will only be able to see the departments that you have been authorized for.

General Notes:
- Any field greyed out cannot be selected.
- WARNING: Pressing the "Clear” button on this screen returns you to the Gateway application, be careful!

More Notes:
- All Columns are sortable; click on the title of the column to re-sort.
- Under Role, you will see the ALLN01 "Security Groups”.
- Under Dept, the 4 character department code is displayed.
- There are two Name columns, sortable by first, or last name.
- The Unassign column is used when you want to remove a staff member.
## Manage Assignments

### Application:
ALLNO2

### Role:

### Workflow Steps:

### Department:
CCTR - COMPUTER CENTER

### Status:

### Assigned Status:
Assigned

<table>
<thead>
<tr>
<th>Role</th>
<th>Dept</th>
<th>First Name</th>
<th>Last Name</th>
<th>Handling</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRVL-PL</td>
<td>CCTR</td>
<td>Scott</td>
<td>Bury</td>
<td>Inprogress</td>
</tr>
<tr>
<td>TRVL-P</td>
<td>CCTR</td>
<td>Lisa</td>
<td>Mayer</td>
<td>Inprogress</td>
</tr>
<tr>
<td>DBBR-P</td>
<td>CCTR</td>
<td>Lisa</td>
<td>Mayer</td>
<td>Inprogress</td>
</tr>
<tr>
<td>TOP-P</td>
<td>CCTR</td>
<td>Lisa</td>
<td>Mayer</td>
<td>Inprogress</td>
</tr>
<tr>
<td>TOW-DA</td>
<td>CCTR</td>
<td>Lisa</td>
<td>Mayer</td>
<td>Inprogress</td>
</tr>
<tr>
<td>TRAI-P</td>
<td>CCTR</td>
<td>Kelly</td>
<td>Oopil</td>
<td>Inprogress</td>
</tr>
<tr>
<td>TRVL-P</td>
<td>CCTR</td>
<td>Kelly</td>
<td>Oopil</td>
<td>Inprogress</td>
</tr>
<tr>
<td>DBBR-P</td>
<td>CCTR</td>
<td>Kelly</td>
<td>Oopil</td>
<td>Inprogress</td>
</tr>
<tr>
<td>TOP-P</td>
<td>CCTR</td>
<td>Kelly</td>
<td>Oopil</td>
<td>Inprogress</td>
</tr>
</tbody>
</table>

### First Name:

### Last Name:

### LAF:

### Project Code:

### Cost Center:

---

Add New Assignment  Items Per Page: 10 1 2 3 Prev Next
Testing ideas for the Manage Assignments screen

Review the displayed list for your department.

1. **Check your own permissions and those of your staff.**
   It should match what is currently in ALLN01 on Com-Plete. Is anyone missing what should be there? Does anything seem odd?

   Keep in mind that not all security groups have been migrated from ALLN01. For example, the security groups for the old Rex system, RQSB-DU, RQSB-RL have not been migrated, as that system has been replaced by the Gateway application

2. **Change your department code** (if you are a DSA for more than one department) and review staff entries for each department code.

3. Try making yourself a DSA for another department, one that you haven't been authorized for.

4. **Try clicking on the Column Headings** (Role, Dept, First Name, Last Name etc.) to resort.

5. Try to do a search using someone's "Last Name" and display the entry.

6. Do a search, using "First Name", and see what kind of results you get.

7. **Combine search criteria** (Department Code + Last Name, for example) and see what kind of result you get.

8. **Make a deliberate error … type your last name in "Last Name", but include a leading blank -- like " Malosh".** A leading blank will result in nothing being found.

9. **Change the "Items per Page" pull down to display 10, 20, 30, 50 or 100 entries.**

10. **Click on an entry under the "Unassign" column.** It should be removed from the list.

11. **Change "Assigned Status" from "Assigned" to "Unassigned" and see the results.**

12. **Change "Assigned Status" to a blank and see the results.**
Assignments by User

Continue your DSA testing by either:

1. Clicking on "Assignments by User", or,

2. Click on the "Add New Assignment" button at the bottom left of the "Manage Assignments" screen.

3. You will need to change the Application from "Gateway" to "ALLN02"

4. To use this screen, click on the "Lookup User" button.

5. This will bring up a "User Search" box. You can Search on a person's Last or First name. If you click on "Show Advanced Search Options" you will be presented with a couple of additional search options, such as searching on a UCSBnetID or COMPLETE ID (if you know either of those).
For your testing, try these:

1) **Do a search on your last name**: then under the "Actions" column; **Select** it.

![User Search](image)

You may also **try searches using First Name, UCSBnetIDs, or Complete ID**. A "wild card", using an asterisk (*) in a search field can be used as well (Malo*, for example).

![Assignments by User](image)
2) **Assign a new Role for yourself.** For my example, I selected TRVL-RL as the role, and for Department selected CCTR.

Clicking "Save" will update my entry, and the new role will appear "unsorted" in my list of assignments.
**Hint: sort the list for readability!** You can re-sort the list by the Role or Dept columns which will group the results, however you wish. This can be useful when eyeballing role assignments that you are making.

Here is the same list, sorted and grouped by the Dept column!

![Current Assignments for Terry Malosh:](image)

**Assigned Status:** Assigned

<table>
<thead>
<tr>
<th>Role</th>
<th>Dept</th>
<th>Unassign</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRVL-DU</td>
<td>CCTR</td>
<td>Unassign</td>
</tr>
<tr>
<td>TOF-DB</td>
<td>CCTR</td>
<td>Unassign</td>
</tr>
<tr>
<td>TRVL-RL</td>
<td>CCTR</td>
<td>Unassign</td>
</tr>
<tr>
<td>TOE-PRE1</td>
<td>CCTR</td>
<td>Unassign</td>
</tr>
<tr>
<td>BLIS-DB</td>
<td>CCTR</td>
<td>Unassign</td>
</tr>
<tr>
<td>RAPS-DU</td>
<td>CCTR</td>
<td>Unassign</td>
</tr>
<tr>
<td>TRVL-DU</td>
<td>INFO</td>
<td>Unassign</td>
</tr>
</tbody>
</table>

Items Per Page: 20

Here is the same list, sorted by the Role column!

![Current Assignments for Terry Malosh:](image)

**Assigned Status:** Assigned

<table>
<thead>
<tr>
<th>Role</th>
<th>Dept</th>
<th>Unassign</th>
</tr>
</thead>
<tbody>
<tr>
<td>BLIS-DB</td>
<td>CCTR</td>
<td>Unassign</td>
</tr>
<tr>
<td>RAPS-DU</td>
<td>CCTR</td>
<td>Unassign</td>
</tr>
<tr>
<td>TOE-PRE1</td>
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<td>TOF-DB</td>
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<tr>
<td>TRVL-DU</td>
<td>CCTR</td>
<td>Unassign</td>
</tr>
<tr>
<td>TRVL-DU</td>
<td>INFO</td>
<td>Unassign</td>
</tr>
<tr>
<td>TRVL-RL</td>
<td>CCTR</td>
<td>Unassign</td>
</tr>
</tbody>
</table>

Items Per Page: 20
3) **Repeat the above steps** for other members of your department … **assign** them new roles and **resort the results**. Make sure you click on "Save" to update the database!

4) **Default Department**: Every user of ALLN01 is required to have one, and only one, default Department.

   a. **Verify** that the Default Department for yourself is displayed.

      ```
      Default Department for Terry Malosh:
      CCTR – COMPUTER CENTER  Change Default Department
      ```

   b. If you are a DSA for multiple departments, you can **change your default Department** by clicking on "Change Default Department". The departments that you have been authorized for will appear in a drop down. Select a new department and then "Save" it to make it your new "Default".

   c. **Repeat 4b for other members of your department.**

5) **Unassigning users.** To Unassign a user means that you will **remove their active permissions**. **Unassign yourself or other staff member from one role.** Find a role; click on "Unassign". After a confirmation message, that role is removed from the list.

   To totally remove a user, you would Unassign them from all roles.

   **NOTE: BE CAREFUL THAT YOU DO NOT UNASSIGN YOUR OWN DSA ROLE.**

   If you should Unassign yourself from the DSA role, your DSA rights will cease and you will have to contact me to have them re-enabled (or your co-DSA, should there be one)!

6) **Reassigning users.** To Reassign a user means that you will **re-enable their active permission**.

   When might you need to do this? For example a staff member might be 'loaned' to another department, or a staff member make take a leave of absence (such as maternity leave or sick leave), and as the DSA you dutifully
Unassigned them from your department. There could be other circumstances where you might do this.

Once the staff member returns, you would Reassign them their old roles. Do a search on their name, and change the "Assigned Status" pull down to "Unassigned". In the below example, TOF-DB had been Uassigned for me, so to re-enable me, I click on Reassign, and now that role will re-appear in the list of Assigned roles-- very handy.

To try this: Unassign a role from yourself or from a staff member; then Reassign it so that it appears in the list of "Assigned" Current Assignments. (note that the LAFS column has been dropped so it will not appear).

<table>
<thead>
<tr>
<th>Role</th>
<th>Rept ▲</th>
<th>LAF(S)</th>
<th>Reassign</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOF-DB</td>
<td>CCTR</td>
<td></td>
<td>Reassign</td>
</tr>
</tbody>
</table>

Current Assignments for Terry Malosh:

Assigned Status: Unassigned

Items Per Page: 30