

# DAIMLER

## Dealer and Supplier Identity & Access Management

### GEMS: How-To assign role to User

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# GEMS How-To

## Assign Role to User

1 Overview

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2 Role configuration information

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3 Assign role to a user

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4 Assigning roles with different configuration

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5 Approval of the role

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# How to assign role to user

## Overview (1/2)

- Roles are an abstraction of business activities that typically contain a various number of business functions and rights.
- Each role can contain a variety of application entitlements.
- Roles can be individually configured, every configuration can require additional assignment steps (e.g. on next slides).
- Assigning a role to a user is simple and requires no knowledge about application internals or application rights.
- A role can be assigned with an approval task.  
This kind of assignment has to be approved by the Role Approver.  
Until the role is not approved, it is not active.
- Every single role has to be maintained for assignment process.

# How to assign role to user

## Overview (2/2)

- Roles can be assigned by different role assigners or market/org admins, depending on the role configuration.
- The Role owner is the administrator and is responsible for configuring the roles in his scope.

The following administrators can manage role assignments:

Administrator	Comment
Role Assigner (Organization)	Can assign roles for one or more Organization users.
Role assigner (market)	Can assign role for one or more markets
Role assigner (global)	Can assign roles globally and mass import role assignments via CSV file
Market admin (dealer/supplier/corp.customer)	Can assign roles, if it is configured for delegated assignment.
Organization admin (dealer/supplier/corp.customer)	Can assign roles, if it is configured for delegated assignment.
Role approver	Can <b>only approve</b> role assignment.

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# How to assign role to user

## Role configuration information

- A role configuration can generate additional steps at role assignment:
  - Role with organization scope: requires as an additional step, the assignment of an organization to this specific role.
  - Role with custom scope: requires as an additional step, the assignment of already created custom scopes.
  - Each configuration needs a validation limitation. If the role should not have any, just click on “Define the assignment time period” and close the assignment.
- **NOTE: if any of the below mentioned casualties appear, contact the role owner of the role:**
  - If you are unable to see any users, you do not have permission to assign any roles. In this case you need the “role assigner” Role.
  - If you do not find a specific user community, it means the role was not configured for this community.
  - If you cannot find a role in your market, most likely the role was not configured yet to be assignable for the needed market.
  - If the role you need to assign should be require custom scopes, abut you are not able to find the role, the creation of the custom scopes is required.

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# How to assign role to user

## Assign role to user (1 / 4)

- Start the assignment by clicking on **Users** (1) tab. Use the **Search Filter** (2) to find the user, who needs the role.
- Input the values relevant for your search. You can use as many fields as you wish. They will be interpreted with logical “AND”. You can also utilize \* as wildcard for easier search. However using the User ID is the fastest way to find a user (2).
- Click on the **user** (3) to continue in the process.

The screenshot displays the Daimler GEMS Identity & Access Management interface. At the top, the Daimler logo is on the left, and the user's name 'John Doe' and 'Log Off' option are on the right. Below the logo, there are navigation tabs: 'Tasks', 'Users' (highlighted with a red box and '1'), 'Roles', 'Applications', and 'Info'. A 'Users' sub-tab is also visible. Below the tabs, there is a search filter section (highlighted with a red box and '2') containing several input fields: 'Last name', 'First name' (with 'd7hedesk' entered), 'Email', 'Phone', 'Organization or department', 'Dealer No. / Supplier ID', 'City', 'Only active' (dropdown), 'All communities' (dropdown), 'All Countries' (dropdown), and 'Job title role name'. There are 'Search' and 'Clear input' buttons. Below the search filter, there is a table with one row of data (highlighted with a red box and '3'). The table has columns: 'Community', 'User ID', 'Active', 'Last name', 'First name', and 'Home organization'. The row contains: 'Dealer', 'D7HEDESK', a green checkmark, 'Desk', 'help', and 'SOREMAR S.A. / D'. At the bottom, there are pagination controls and 'Items per page' dropdowns.

Community	User ID	Active	Last name	First name	Home organization
Dealer	D7HEDESK	✓	Desk	help	SOREMAR S.A. / D



# How to assign role to user

## Assign role to user (2/4)

- Continue with **Manage roles** (4) and select **Assign role** (5) to continue with the role assignment.
- You will be redirected to a page where you can search the role you want to assign to the user.
- **NOTE:** The box „**Filter roles by**“ is **NOT** for assigning roles. This **search filter** (6) is for searching of already assigned roles.

The screenshot shows the Daimler GEMS Identity & Access Management interface. The user profile for 'help Desk (D7HEDESK)' is displayed. The 'Manage roles' button is highlighted with a red box and the number 4. The 'Assign role' button is highlighted with a red box and the number 5. The 'Filter roles by' search box is highlighted with a red box and the number 6. The search box contains two input fields: 'Role name' and 'Role ID', and a 'Search' button. The 'Assigned roles' table is currently empty, showing 'No entries found!'.

# How to assign role to user

## Assign role to user (3/4)

- Using the **search field** (7) you can find the role you want to assign. If you have only a few roles you can click directly on “Search”. All Roles you are able to assign will be displayed. You can also use \* as wildcard to improve your search experience.
- Once the role found, select it (8) and continue by clicking on **Pick roles** (9).

The screenshot shows the Daimler GEMS Identity & Access Management interface. The user 'help Desk (D7HEDESK)' is selected. The 'Filter roles by:' section (7) contains input fields for 'Role name', 'Role ID', and 'All role types', along with a 'Search' button and a 'Clear input' button. Below this, a message states: 'There are no search results. Start the search by pressing the 'Search' button. Indicate search criteria to limit the search results if necessary.' A 'Pick roles' button is visible. The 'Pick roles' dialog (8) shows a table with one role selected:

Name	Description
<input checked="" type="checkbox"/> App_ID_testrole_2	Test Role without any Configuration

The 'Pick roles' button (9) is highlighted at the bottom of the dialog.

# How to assign role to user

## Assign role to user (4/4)

- After picking the role, you will be guided to the last step of the assignment: defining an assignment period for this role (10).
- Depending on the configuration of the role, you can define a time period for this role or you may leave the input field empty and finish the assignment (11) by clicking on ***Define the assignment time period*** (12).

DAIMLER GEMS Identity & Access Management

Tasks Users Roles Applications Info

Users

User help Desk (D7HEDESK)

Overview

Modify data

Manage roles

Step 1: Roles selected - App\_ID\_testrole\_2

Step 2: Define the assignment time period **10**

Please define the time period for which the role will be assigned.

Items 1-1 of 1

Page: |< << 1 >> >| Items per page 20

Name	Restriction	from	to	Default validity
App_ID_testrole_2		<input type="text"/>	<input type="text"/>	OPTIONAL

Page: |< << 1 >> >| Items per page 20

Back Define the assignment time period **12**

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# How to assign role to user

## Role approval (1/2)

- The role approver of the role you assigned gets notified about the outstanding role approval as a new Task on his GEMS Home page.
- He can decide whether to **accept or reject** the role assignment (1).

The screenshot shows the Daimler GEMS Identity & Access Management interface. At the top, it says "Welcome help Desk (D7HEDESK) Log Off" and "DAIMLER GEMS Identity & Access Management". Below this are navigation tabs: "Tasks", "Users", "Organizations", "Roles", and "Info". Under "Tasks", there are sub-tabs for "My tasks" and "Triggered tasks". A search form is present with fields for "Task number", "Role approval" (dropdown), "Recipient UID", "Affected user UID", and "Originator UID", along with "Search" and "Clear input" buttons. Below the search form, it says "Items 1-1 of 1" and "Page: |< << 1 >> >|". A table lists the task details:

Task number	Task type	Task	Pending since	Expires on	Status	Possible actions
B1905092	Role approval	Please check the following assignment for the Role App_ID_testrole_3	05/09/2019	05/08/2020	Pending	Approve Reject

At the bottom of the page, it says "Page: |< << 1 >> >|" and "Items per page 20". A red box highlights the "Approve" and "Reject" buttons in the table, with a red "1" in a small box next to the "Reject" button.

# How to assign role to user

## Role approval (2/2)

- Once the role has been approved, you as a role assigner can review the user's role again. Navigate to Manage roles as described at the beginning of this tutorial and review the role assignment.
- Notice that the role appears in the table Assigned roles (2).

The screenshot shows the Daimler GEMS Identity & Access Management interface. The user 'help Desk (D7HEDESK)' is selected. The 'Assigned roles' section shows a table with one role assigned: 'App\_ID\_testrole\_3'. A red box highlights this role in the table.

Role	Restriction	from	to	Default validity
<input type="checkbox"/> App_ID_testrole_3	AUTOMOBILS PYRENEES, S.A., Prat de la Tresa s/n-Crta.General s/n, Sant Julià de Lòria, AD (Dealer) custom-scope-one			OPTIONAL