



ENOVIA Training
Foil

LCA Administration Advanced (5)

People & Organization

Version 5 Release 11
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EDU-ENOV-E-LAP-AF-V5R11

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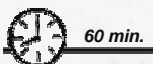
Course Presentation

Objectives of the Course

In this course, you will see how to use People & Organization.

Targeted audience

ENOVIA V5 Administrators



60 min.

Prerequisites:

UNIX & NT Administrators

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Planning

In this course, you will see how to use P & O

- Introduction
- Company Structure Definition
- Security Rules Definition
- Import / Export Capability

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Introduction

You will see an Introduction of People and Organization

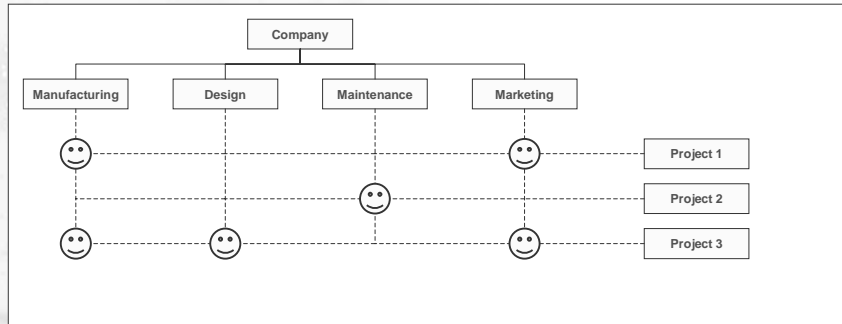
- ▣ Purpose of P&O Module
- ▣ Security Management
- ▣ P&O Data Model
- ▣ P&O Administration Tool : VPMPeopleEdit

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Purpose of P&O Module

- Describe company structure and projects
- Define security rules



The users are working in different departments of the company (Manufacturing, ...). So they will be managed by the manager of each department, who will take care of them. On the other hand, they have to work on different projects. So they will need to have different access rights on data belong to Project 1, or Project 2 ...

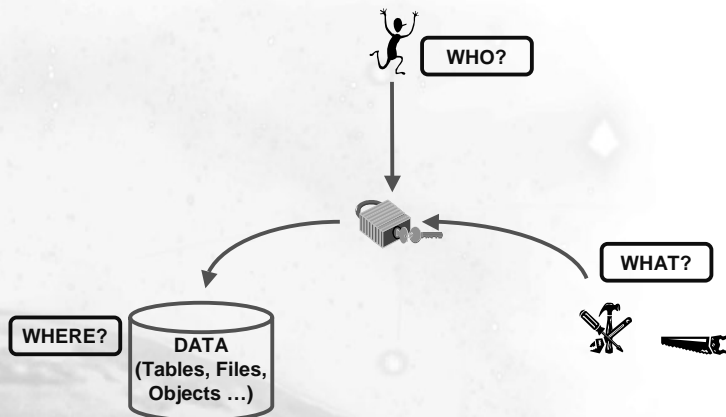


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Security Management

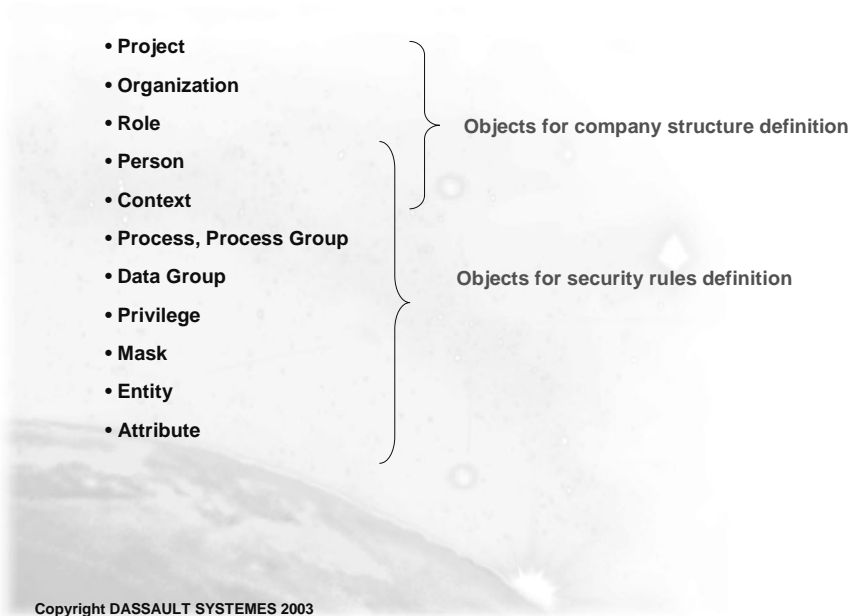
- Define security applied on objects methods with Privileges
- Define security applied on objects access with Masks



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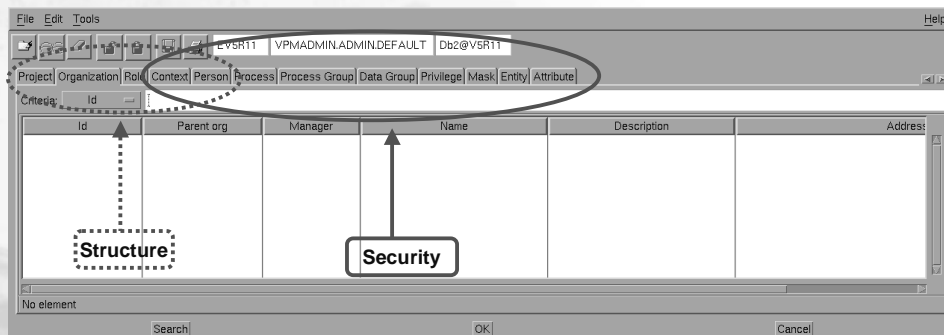
P&O Data Model



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P&O Administration Tool: VPMPeopleEdit

- Host : Server
- `$CATInstallPath/$OS/code/command/catstart -env ENOVIA_LCA.V5R11.B11 -direnv /CATEnv -run VPMPeopleEdit`



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Company Structure Definition

You will see how to manage Company Structure

- ▣ Project and Context : Definition
- ▣ Organization : Definition
- ▣ Create a new Organization
- ▣ Role : Definition
- ▣ Create a new Role
- ▣ Person : Definition
- ▣ Create a New Person
- ▣ P&O Example

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Project & Context

Support for Contexts and Projects in People, Organization and Security

The People and Organization application has been enhanced by the addition of new objects in the P&O structure: *context* and *project*.

You now connect to the ENOVIA V5 server by selecting a context which defines which project you are working on, the role you adopt, and the organization you belong to.

Now, user authorization privileges will be specified by a combination of organization, project, and role referred to as a context (specified during login), as opposed to only organization and role in the past.

Projects are not dependent on organizations, therefore members of different organizations could be placed on the same project with differing authorization results.

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Project & Context : Definition

Project

- The project establishes the link between the role and the organization within a context.
- Once you have created the project, you can assign it and use it to create a context.

Context

- The context is a centralizing P&O object linking together the project and its associated resources : role and organization.
- The context must have a project, role and organization.
- Contexts replace the « former » roles, and provides the same fonctionnalités.



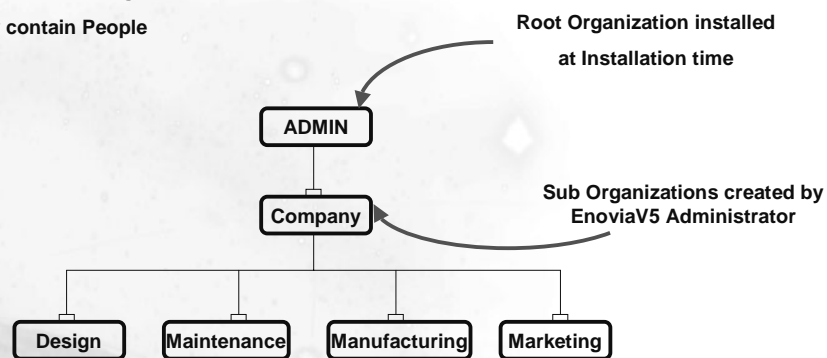
Default context :
VPMADMIN.ADMIN.DEFAULT

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Organization : Definition

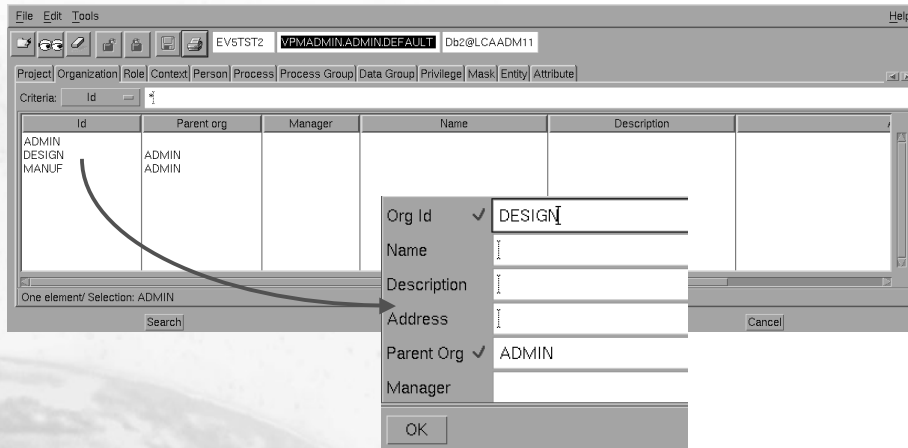
- Describes company division, projects
- Defines hierachical dependencies
- Can have a Manager
- May contain People



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Create a New Organization



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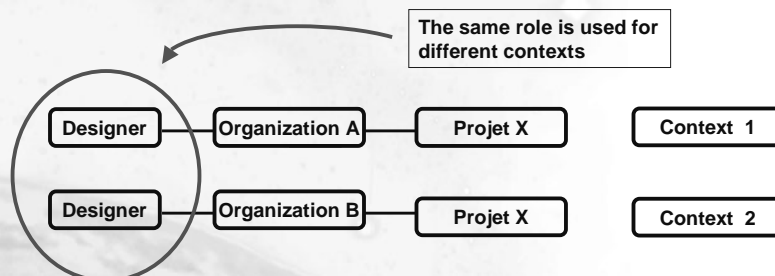
Roles : Definition

Groups of employees having the same position in the company

Represents a job in the company (Designer, Manager etc.)

Since V5R11, the new role is not as rich as before :

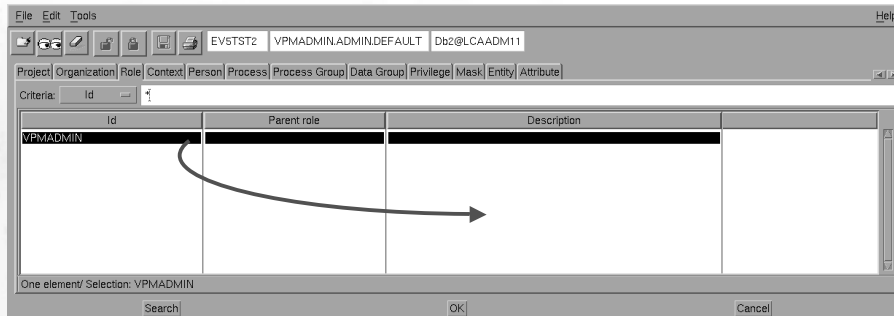
- You don't apply now privileges to role but to context.
- Roles don't dependent anymore on organization.



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Create a New Role

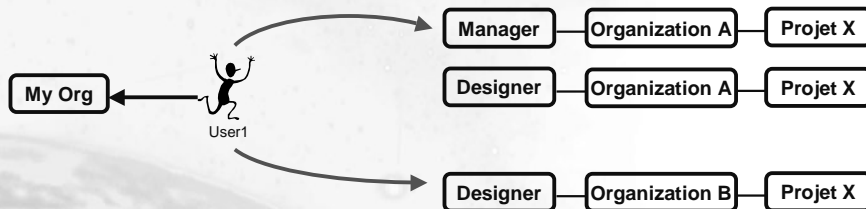


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Person : Definition

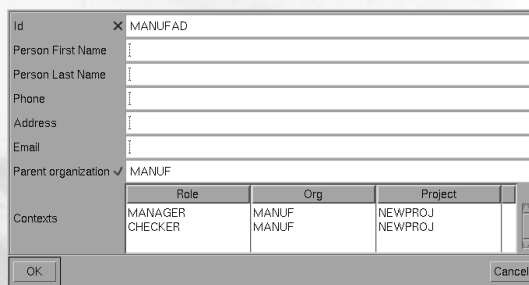
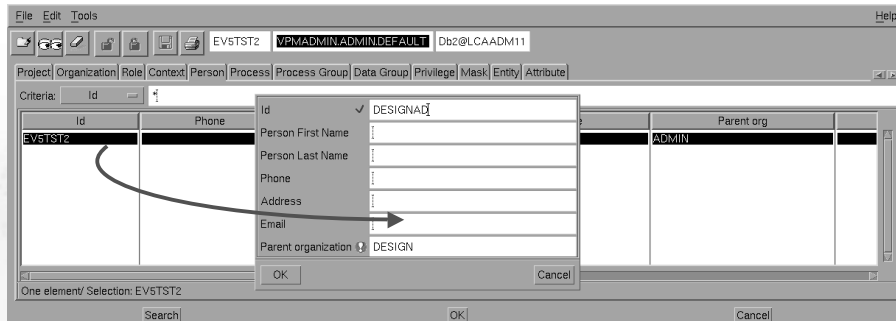
- Represents a User (associated with a Windows or UNIX user)
- Belongs to one Organization
- Can work using many Contexts in several Organizations
- Can manage an Organization



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Create a Person



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Security Rules Definition

You will see how to manage Security Rules

- ▣ Process
- ▣ Process Group
- ▣ Data Group
- ▣ Data Group : Enhancement
- ▣ Privileges
- ▣ Mask

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Process

- Operation that can be performed by somebody
- Represents an Enovia functionality
 - ✓ Create a PART
 - ✓ Delete an ACTION
 - ✓ Create A LINK ...
- Created at installation time
- Can not be created, nor deleted nor modified
- Made of three components : Application + Class + Method
 - ✓ example: VPM + ENOVIA_VPMPartVersion + Create
- Two types of processes:
 - ◆ Specific process : VPM.Action.Create
 - ◆ Global process : VPM.Action
- Can be grouped into Process Groups
- A Process can require association with data groups when referenced by privileges

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Process

- Attribute '*Description*'
 - ✓ req : "required" Process that can be used under conditions. When you will grant this Process via a Privilege, you will have to associate the corresponding condition

Application	Entity	Command	Description
VPM	LOGIN		--
VPM	ENOVIA_VPMItemInstance	Replace	-- req
VPM	ENOVIA_VPMPartVersion	Replace	-- req
VPM	ENOVIA_VPMProductClass	AddChildProductClass	-- req
VPM	ENOVIA_VPMProductClass	AddChildProductRootClass	-- req
VPM	ENOVIA_VPMProductRootClass	AddChildProductComponent	-- req
VPM	ENOVIA_VPMProductComponent	AddChildProductComponent	-- req
VPM	ENOVIA_VPMPartVersion	AddChildAR	-- req
VPM	ENOVIA_VPMProductRootClass	ImportGenericComponent	-- req
VPM	ENOVIA_VPMProductRootClass	AddChildPartInstance	-- req
VPM	ENOVIA_VPMProductComponent	AddChildPartInstance	-- req

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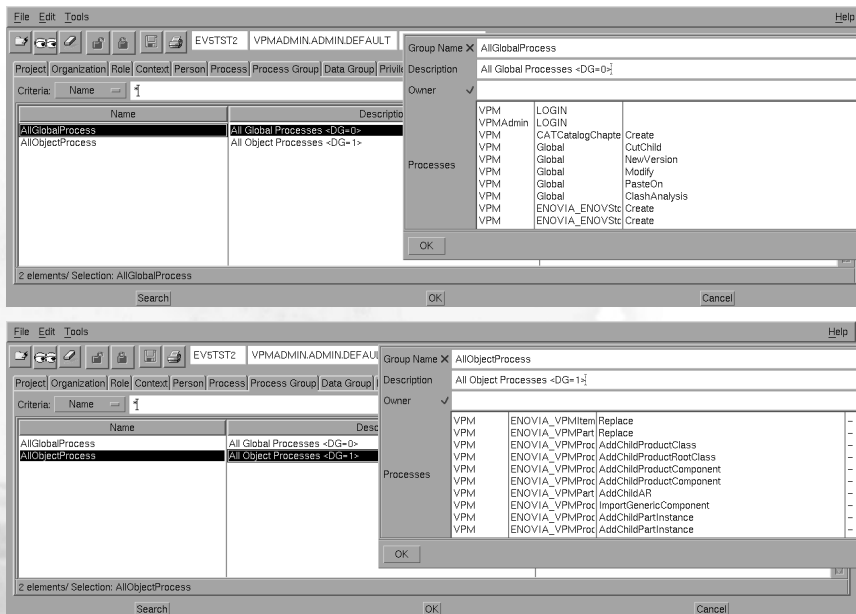
Process Group

- List of Process objects
- Can not contain any other Process Group
- A Process may be referred by multiple Process Groups
- It is possible to create, Edit and Delete a Process Group
- The objective of the Process Group is to facilitate the Privileges management

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Process Group

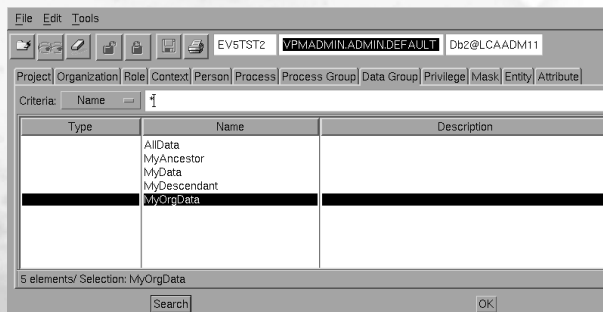


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Data Group

- Defines the criteria (on ownership, for example) an object must match to automatically belong to the group. It is used to define Privileges on Process objects
- Set of Data that match a criteria
 - ✓ Data belonging to a User or an Organization or matching conditions
- Two types of Data Group
 - ✓ Implicit - created at installation time
 - ✓ Explicit - to be defined by administrators

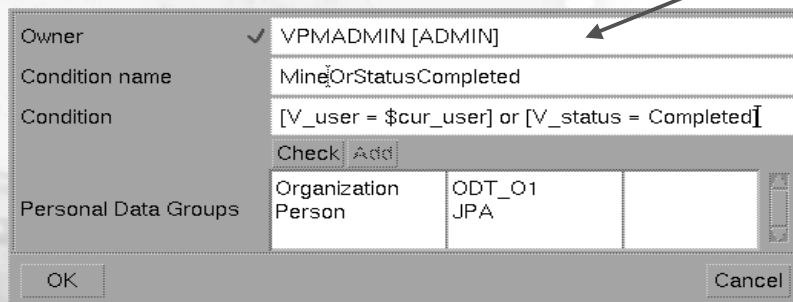


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Data Group : Enhancement

- Create detailed conditions:
 - ✓ Session context → [V_organization = \$cur_org]
 - ✓ Single reference → V_cur_action[! V_status = Completed]
 - ✓ Aggregate → any V_actions[! V_status = SHARED]
- Conditions can be described with a specific language
- Possibility to validate Condition Syntax

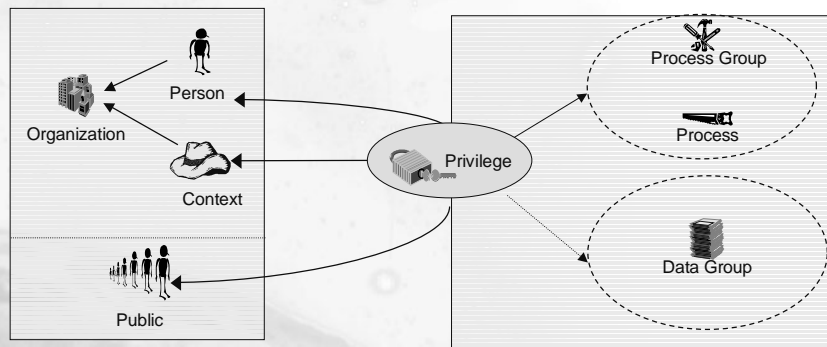


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Privileges

- Defines the access rights to a Process or a Process Group
- Can be Granted or Revoked
- It is associated to a Person or a Context or made Public



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Privileges

- The three types of Privileges
 - ✓ Person: Access rights to resources apply only to a person –Priority 1
 - ✓ Context : Access rights to resources apply to a context in a specific organisation –Priority 2
 - ✓ Public: Access rights to resources apply to all users –Priority 3
- Revoke has priority over Grant

The screenshot shows a software window with a menu bar (File, Edit, Tools) and a toolbar. Below the toolbar is a navigation pane with tabs for Project, Organization, Role, Context, Person, Process, Process Group, Data Group, Privilege, Mask, Entity, and Attribute. The 'Privilege' tab is selected. Below the navigation pane is a search criteria field with 'Person id' entered. The main area contains a table with the following data:

Grant	Granted To	Application	Entity	Command	Data group
Granted	VPMADMIN.ADMIN.DEFAULT	VPMAdmin	LOGIN		
Granted	VPMADMIN.ADMIN.DEFAULT	Process Group	AllGlobalProcess		
Granted	VPMADMIN.ADMIN.DEFAULT	Process Group	AllObjectProcess		AllData
Granted	VPMADMIN.ADMIN.DEFAULT	VPM	LOGIN		

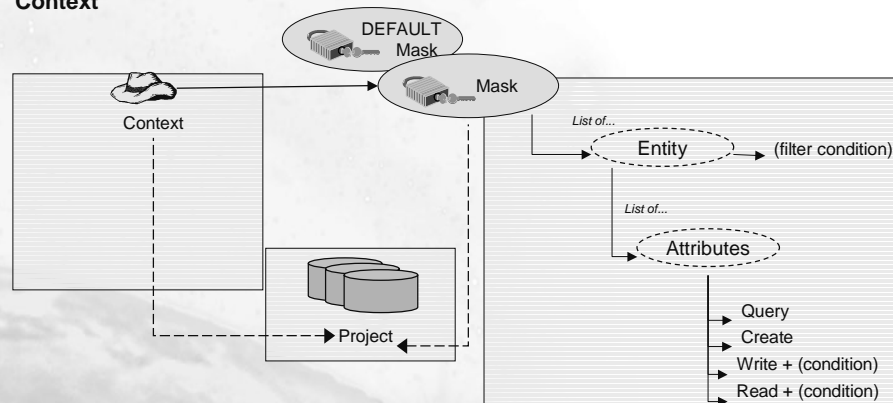
At the bottom of the window, it indicates '4 elements' and has buttons for Search, OK, and Cancel.

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Masks

- Masks specify and secure the access to business objects and their attributes, optionally for a given project.
- Masks are associated to Contexts
- A default mask is created during the installation phase. It is not linked to any Context



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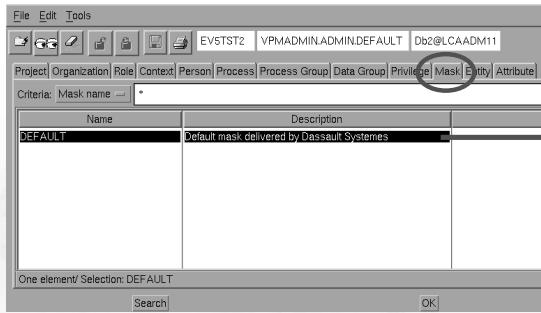
Masks

- **Masks are restrictions:** There is no restriction on attributes if no Mask have been defined on them
- **The restriction is performed on four GUI oriented operations:**
 - ✓ creation, e.g. a creation panel
 - ✓ read, e.g. a list displaying a query result (column filtering)
 - ✓ write, e.g. a properties panel
 - ✓ query, e.g. a generic query panel
- **The access can be defined under condition for read & write operations**
- **A context can have only :**
 - ✓ ONE mask for a given project name
 - ✓ ONE mask with NO project name: the role's default mask
- **At login time, a mask concatenation is done-** first, the mask associated to the context and valid for the project (or all projects) is retrieved (if any) and then, the DEFAULT mask (if any)

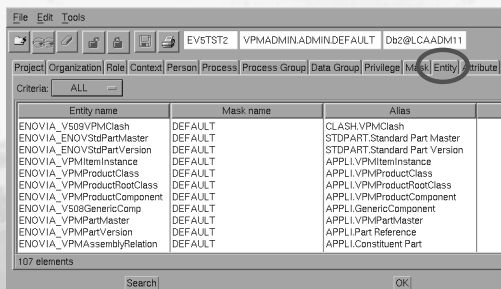
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Masks



There is only the default mask

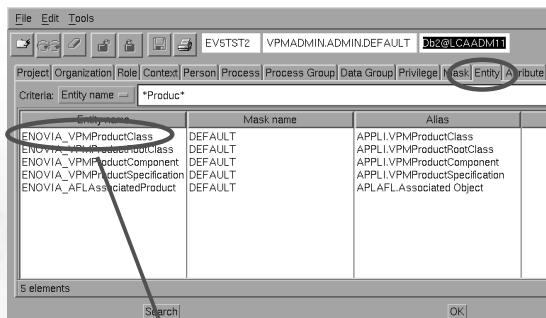


All entities are linked to the default mask

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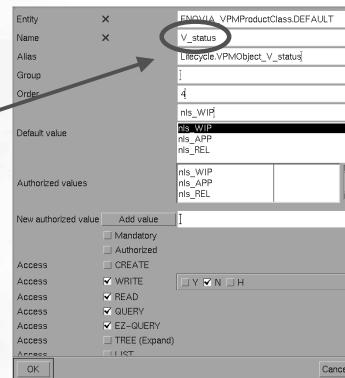
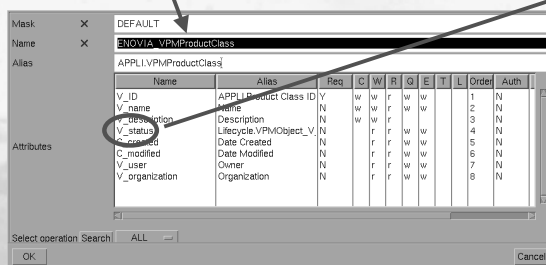
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Masks and Attributes



In Entity tab, each entity is described by its different attributes

You can put restrictions on each attribute



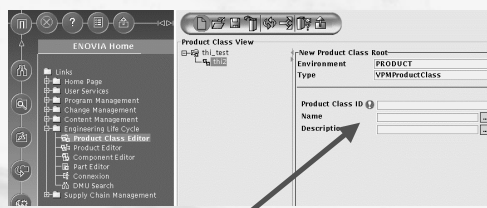
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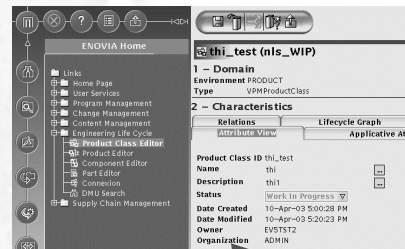
Masks and Attributes

Attribute name	Entity name (MASK)	Mandatory	C	W	R	O	Alias	Default value	Auth. req.
V_ID	ENOVIA_VPMProductClass.DEFAULT	Y	w	r	r	w	APPLI Product Class ID		N
V_name	ENOVIA_VPMProductClass.DEFAULT	N	w	r	r	w	Name		N
V_description	ENOVIA_VPMProductClass.DEFAULT	N	w	r	r	-	Description		N
V_status	ENOVIA_VPMProductClass.DEFAULT	N	-	r	r	w	Lifecycle.VPMObject_V_stat		N
C_created	ENOVIA_VPMProductClass.DEFAULT	N	-	r	r	w	Date Created		N
C_modified	ENOVIA_VPMProductClass.DEFAULT	N	-	r	r	w	Date Modified		N
V_user	ENOVIA_VPMProductClass.DEFAULT	N	-	r	r	w	Owner		N
V_organization	ENOVIA_VPMProductClass.DEFAULT	N	-	r	r	w	Organization		N
V_ID	ENOVIA_VPMProductRootClass.DEFAULT	Y	w	r	r	w	APPLI Product ID		N

For each attribute of an entity, you have one row in the « attribute tab »



What you see at creation on the LCA client.
(here for a new Product Class)



What you see after creation on the LCA client

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Import / Export Capability

You will see how to import and export P&O configuration

- ☐ Tool
- ☐ Text File Format
- ☐ P&O Import File Example
- ☐ Mask Import File Example

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Tool

- Massive Import/Export capabilities
- Create or Extract P&O / Security Objects
 - ✓ Organization
 - ✓ Role
 - ✓ Context
 - ✓ Project
 - ✓ Person
 - ✓ Privileges
 - ✓ Masks
- Batch command: VPMPeopleImport
 - ✓ VPMPeopleImport [-h | -lang] [-u <user> -p <password>]
 - [-export [-org <organization>]] <filename>
- Such an Import/Export file matches a predefined text format

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Text File format

```
*MODE          [ CHECK ]      [ REPLACE | NOREPLACE ]
*DDL           [ GENERATE ]   [ EXECUTE ]
*SEPARATOR <one_character>
*ORG <org_id>, <parent_org_id> [, <name> [, <description> [, <address>]]]
*ROLE <role_name>, <org_id> [, <parent_role_name> [, <description>
[, <license>]]]
+PERSON <person_id>
+MASK <mask_name>
-MASK <mask_name>
*PERSON <person_id>, <org_id> [, <FirstName> [, <LastName> [, <Phone>
[, <Address> [, <Email>]]]]]
+MANAGER <org_id>
*PROCESS <application>, <class> [, <method>] [, <data_group_required>]]
*PGROUP <pg_name> [, <description>]
+PROCESS <application>, <class> [, <method>]
*DATA <dg_name>, <dg_type> [, <description> [, <usage>]]
*PRIV <authorization>, <someone>, <process> [, <data_group>]
*MASK <mask_name> [, <project> [, <description>]]
*ENTITY <entity_aci_name>, <mask_name> [, <alias>]
*ATTR <attribute_aci_name>, <entity_aci>, <mandatory> [, <alias>
[, <group> [, <order> [, <sensitive> [, <authorized_required>
[, <default_value>]]]]]]]
+ACI <operation> [, <condition>]
+VALUE <value>
```

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P&O Import file example (1/2)

```
*mode CHECK REPLACE
*ddl GENERATE EXECUTE
>null $
*separator ,
// ----- ORGANIZATIONS -----
*org SUB_ORG1,ODT,$,$,$
*org SUB_ORG2,DUMMY ORG,$,$,$
// ----- PERSONS -----
*person USR2,SUB_ORG1,$,$,$
+manager SUB_ORG1
*person USR7,SUB_ORG1,$,$,$
+manager
*person USR4,SUB_ORG2,$,$,$,$,$
*person USR5
*person USR6,SUB_ORG1,$,$,$
+manager SUB_ORG3
// ----- ROLES -----
*role ROLE_1,ODT,$,$
-person USR1
+person USR2
*role ROLE_2,SUB_ORG1,$,$
-person USR1
+person USR2
// ----- PROCESSES -----
*process ODT_IMPORT
*process ODT_IMPORT,ODTFunction
*process ODT_IMPORT,ODTFunction,$,0
*process ODT_IMPORT,ODTFunction,ODTCommand,1
```

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P&O Import file example (2/2)

```
// ----- PROCESS GROUPS -----
*pgroup ODT_IMPORT,$
+process ODT_IMPORT,ODTFunction
// ----- DATA GROUPS -----
*data ODT_USR1,USER,ODT_USR1 data group,odt_usr1 friends usage only
*data ODT_USR1,Invalid_type,will never be created,$
// ----- PRIVILEGES -----
*priv
1,PERSON=USR2,PROCESS=ODT_IMPORT.ODTFunction.ODTCommand,ODT_USR1,USER
*priv 1,ROLE=ROLE_1.ODT,PROCESS_GROUP=ODT_IMPORT
```

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Masks Import file example

```
*mode CHECK REPLACE
*ddl GENERATE
*separator ,
*null $
*mask test_mask1,test_project,test of import program
*mask test_mask2,$,idem
*mask test_mask3,test_project,pareil
*entity entity1,test_mask1,the_first
*entity entity2,test_mask2,the_second
*entity entity3,test_mask3,$
*attr attr1,entity1.TEST_MASK1,Y,mask1,group1,$,Y,N,green
+aci create
+value blue
+value green
*attr attr2,entity2.TEST_MASK2,Y,check,group0,$,N,Y,$
+aci read
+value teeth
+aci browse
*attr attr3,entity3.TEST_MASK3,N,$,$,$,$,$,$
+value hair
+aci query
+aci write
+value nail
*role basicadmin,odt,$,$
+mask test_mask1
+mask test_mask2
+mask
-mask test_mask3
```

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To Sum Up

In this course you have seen :

- Introduction
- Company structure Definition
- Security Rules Definition
- Import / Export Capability

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