



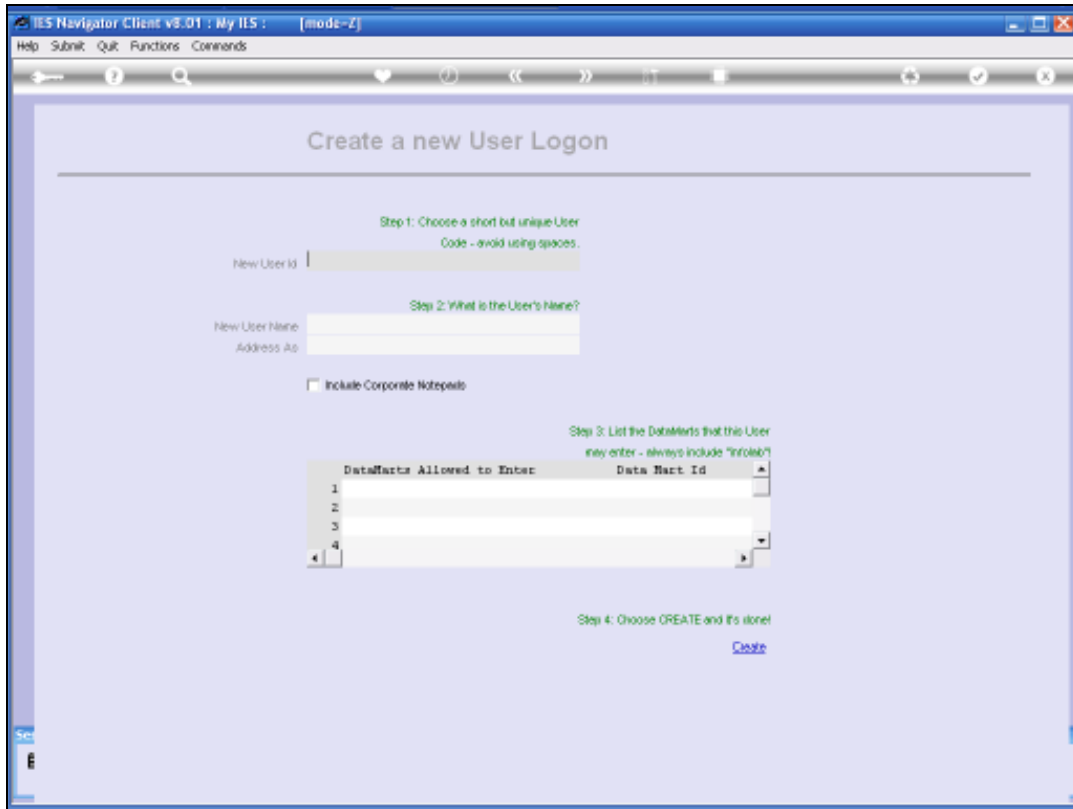
Slide 1

We are busy working with User Profiles and in this session we do an overview of the steps involved in creating a Subscription Profile.

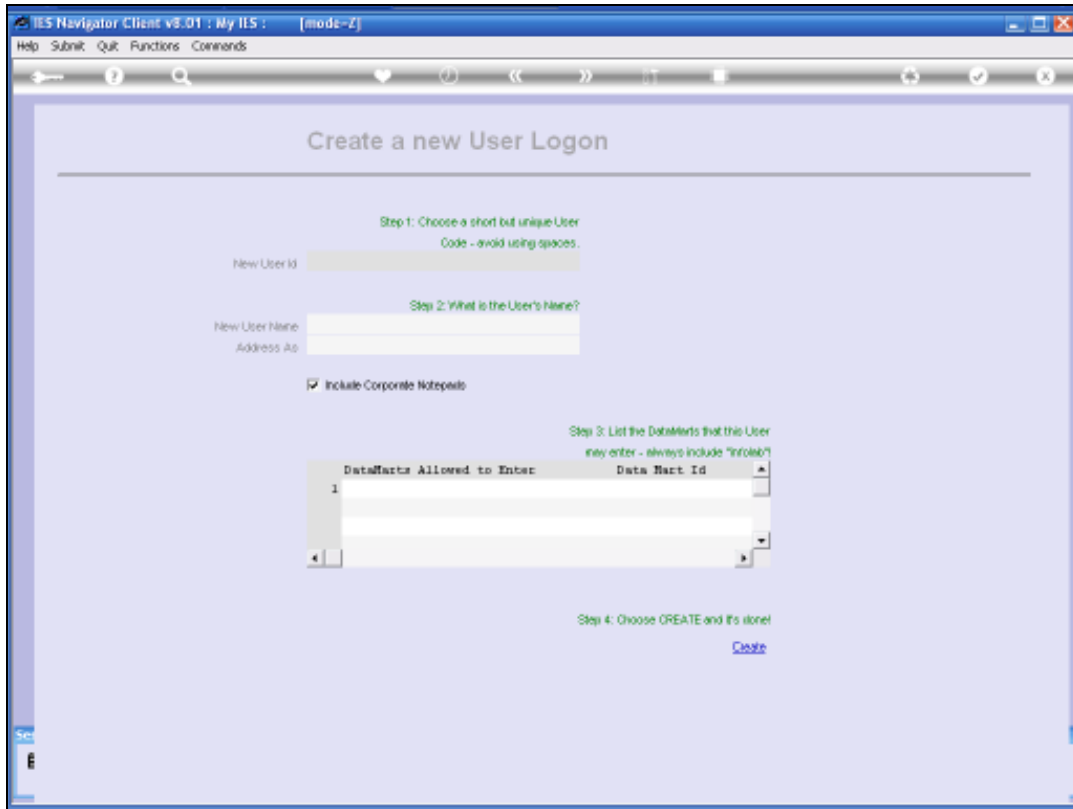
A Subscription Profile is of course something that we can use for other Users to Subscribe to when we setup Users or manage their Access. So we will show the steps that are required to create a Subscription Profile.

We are not going to cover all the detail on each step, because there are separate detailed tutorials for each of these steps.

But this is an overview of the steps involved in creating a Subscription Profile.



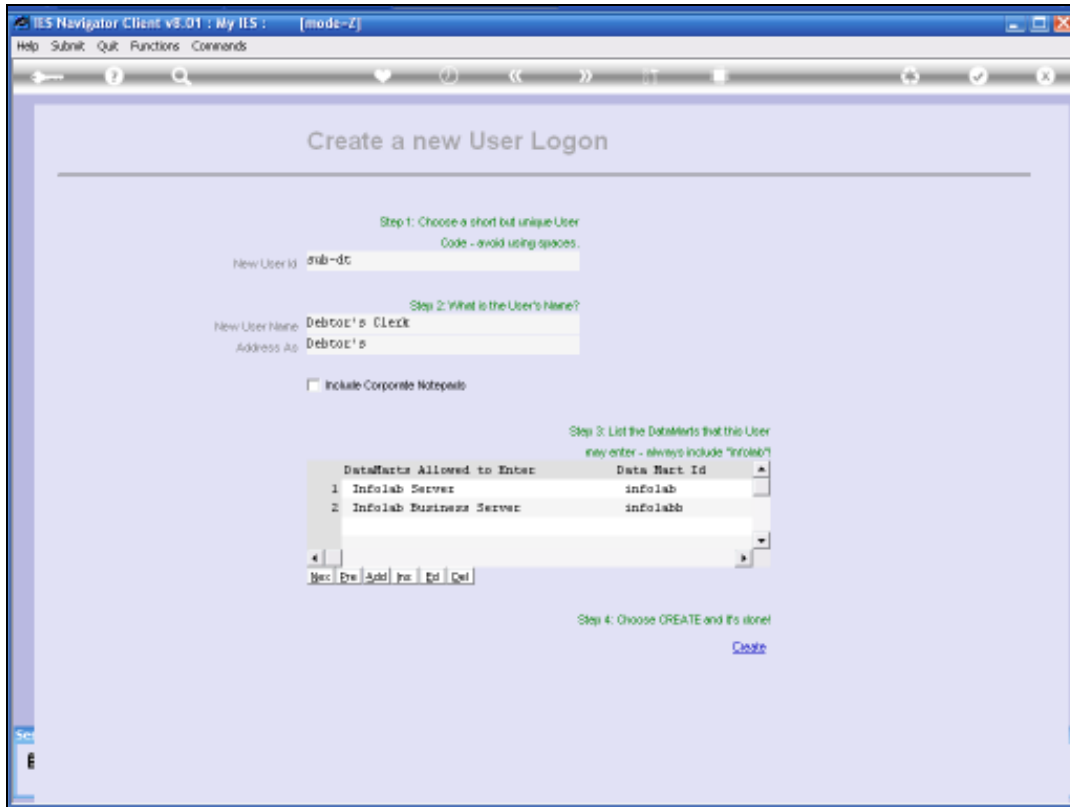
Slide 2



Slide 3

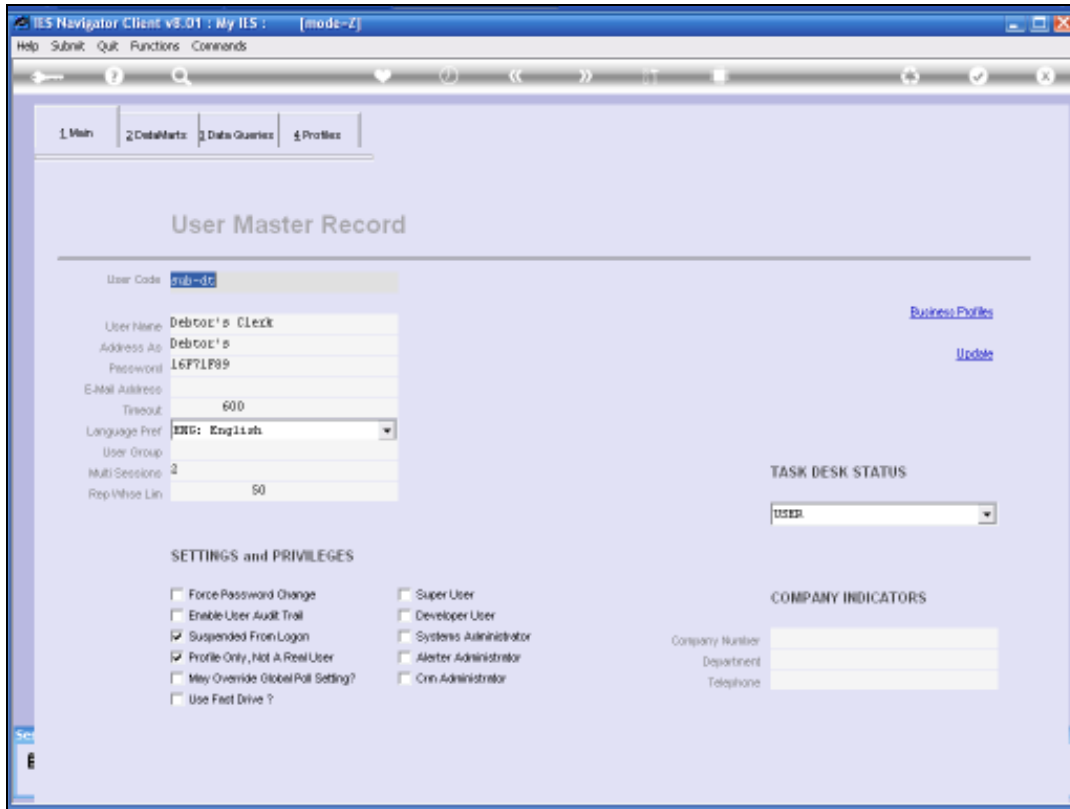
The 1st step in creating a Subscription Profile is to create a User Code that will become this Subscription Profile.

Of course it is going to be a Non-Logon i.e. a Profile Only User Code.



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Notice, that before we choose Create, we will ensure that at least the Primary Data Mart, in which this Profile is to operate, in this case, the Infolab Business Server, is listed under the Data Marts allowed to enter (and usually also for any User Codes that we creates a matter of course).

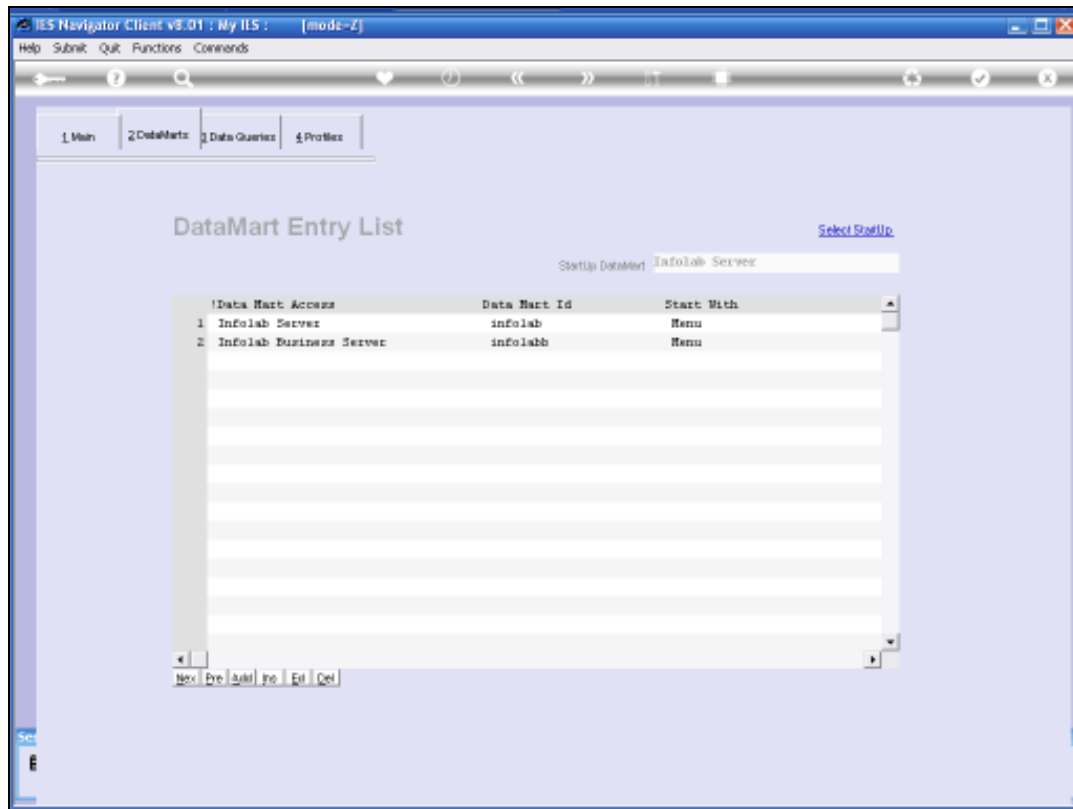


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Once the User Code has been created, we use the Maintain User step to further work with this particular User Code.

Notice that under Settings and Priviledges, we should have "Suspended from Logon" checked. Also "Profile Only, Not A Real User" is checked.

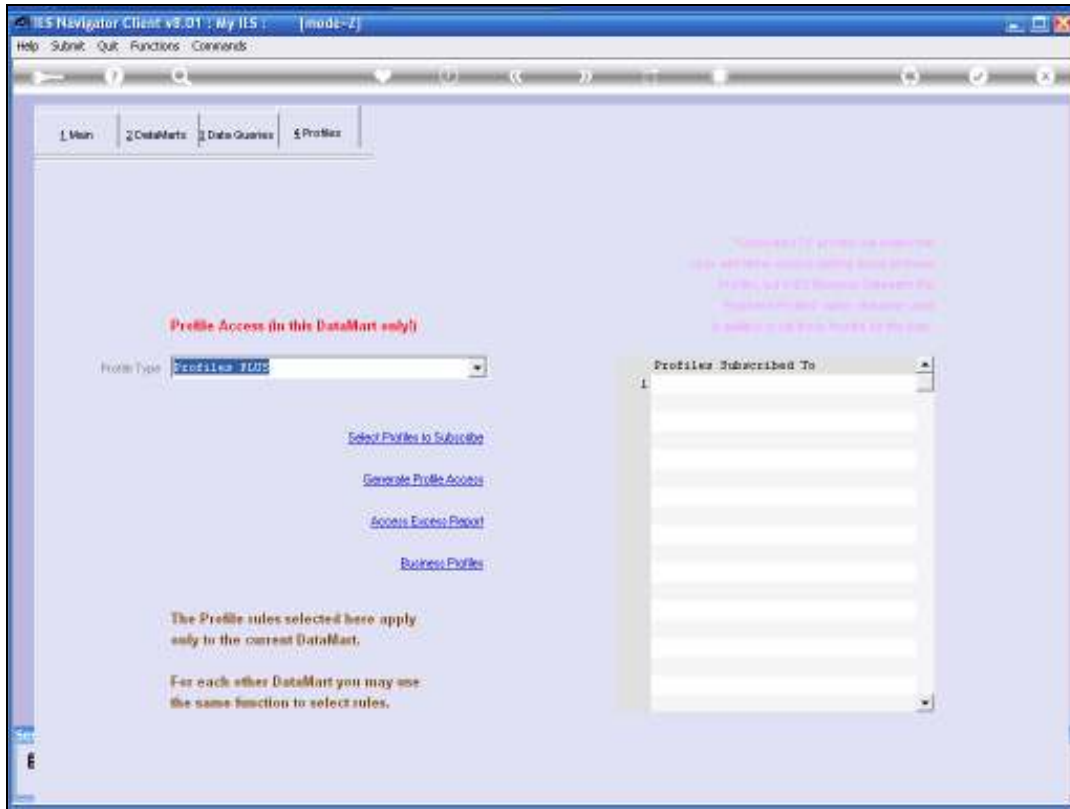
None of the others should be checked.



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Here I am simply showing the Data Mart list for this particular User.

If it is at this stage not correct, then we can still change it here, and we can also change it at any stage afterwards.



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A User Code that is going to be a Subscription Profile, i.e. a Non-Logon User, will not be subscribing to other Profiles.

The Profile Type will then be listed as Profiles Plus.



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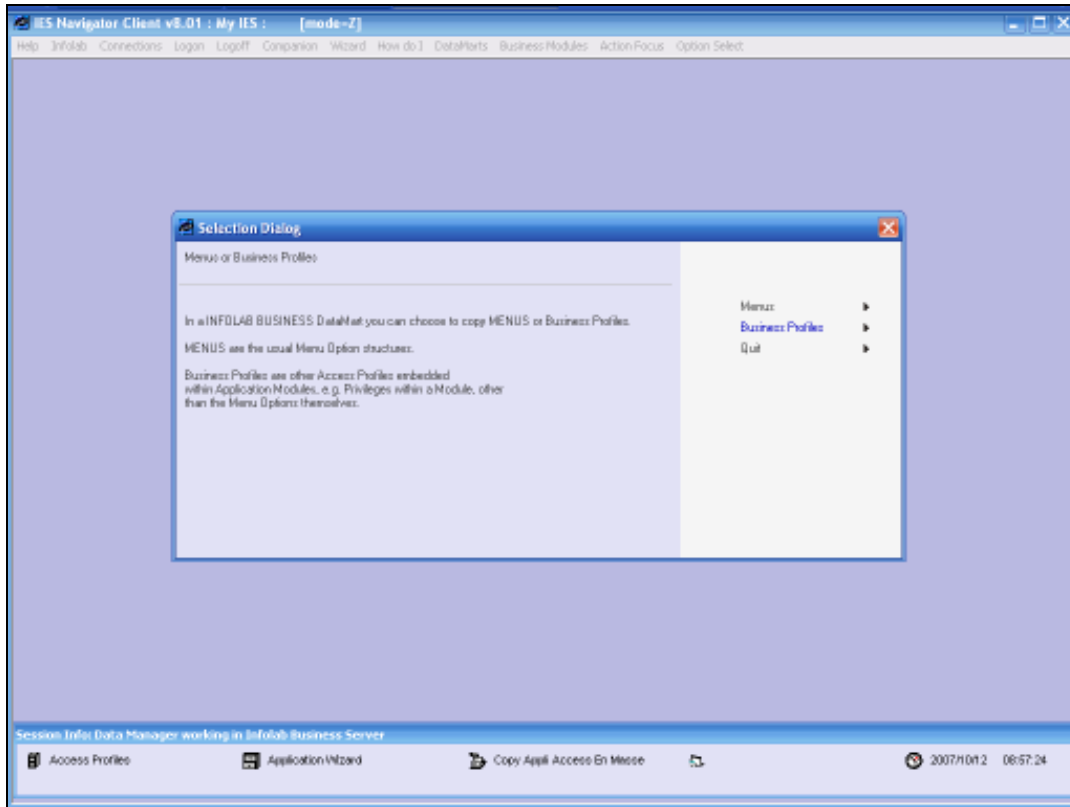
Next we will go to the New Access Methods and use the Copy Profile Option.



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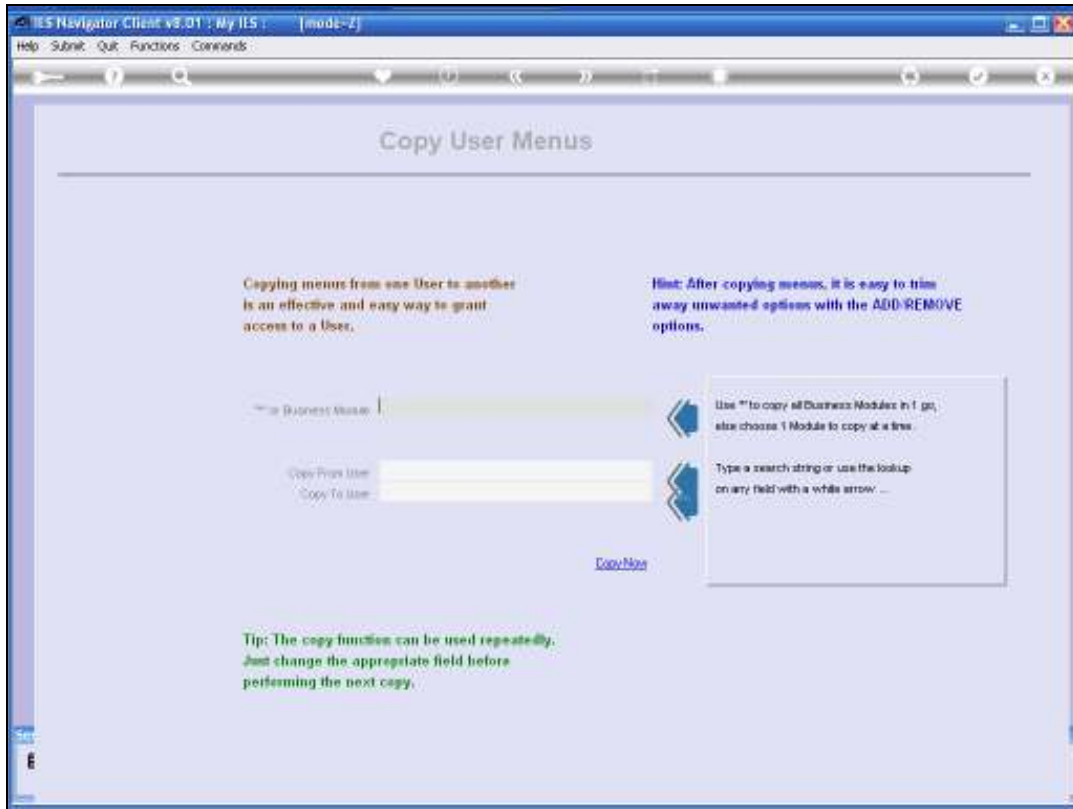


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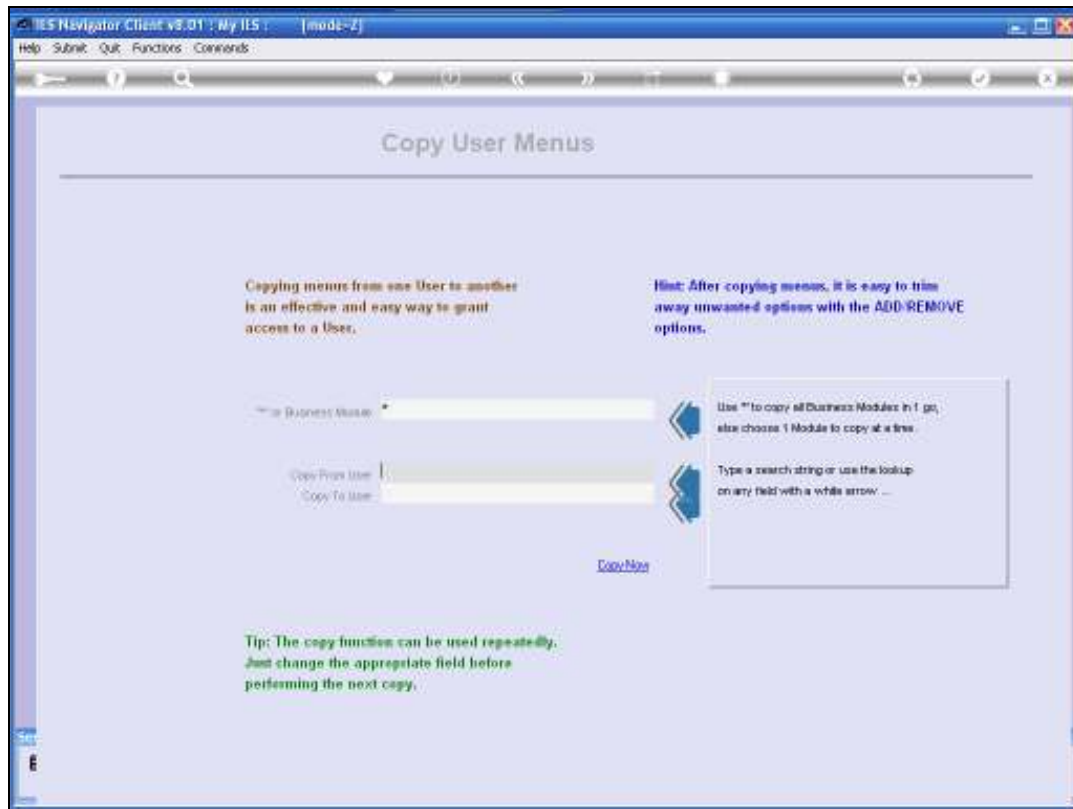


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And in this case we will be Copying Menus.



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In my example I am going to copy all the Business Modules, in one go.

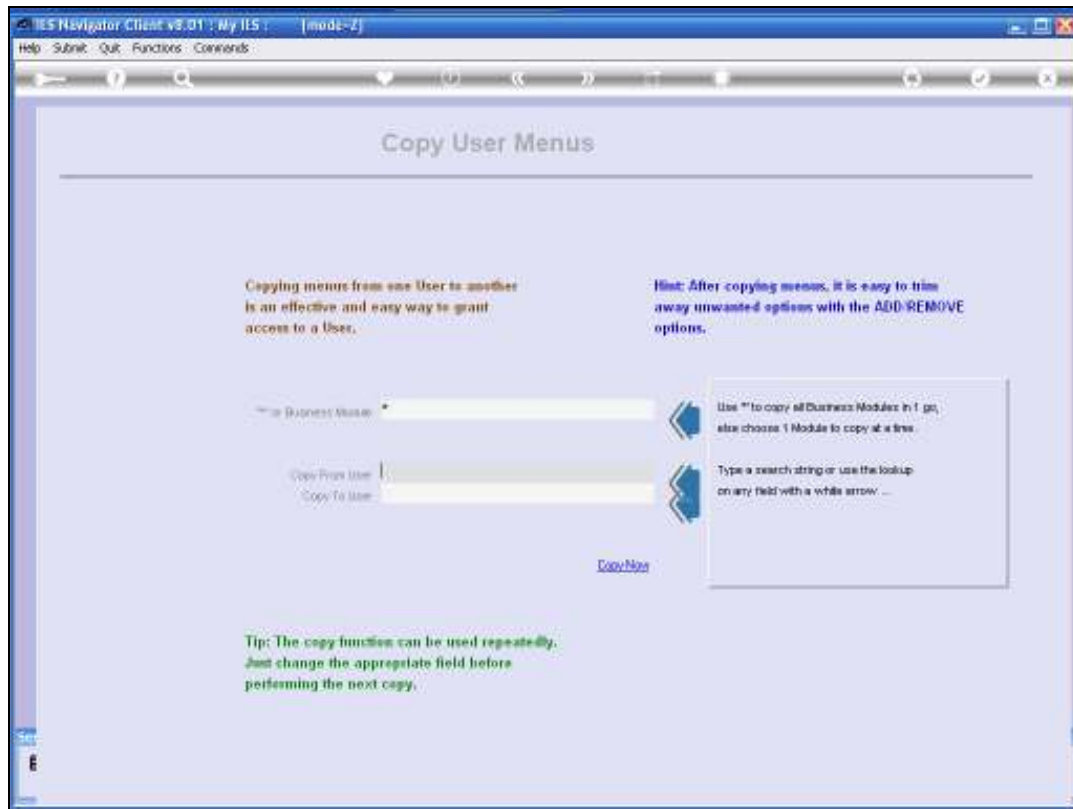
Then after that, I will be trimming the Business Modules that will not be required for this particular Profile.

But if this Profile is only going to be focusing on 1 particular Business Module, which it can of course, because we can have many different Subscription Profiles, then in that case, it may make more sense to just copy the particular Business Module.

In some cases some of them only have one or two Modules.

But, in my example, this is going to be a fairly big Profile, with multiple Modules.

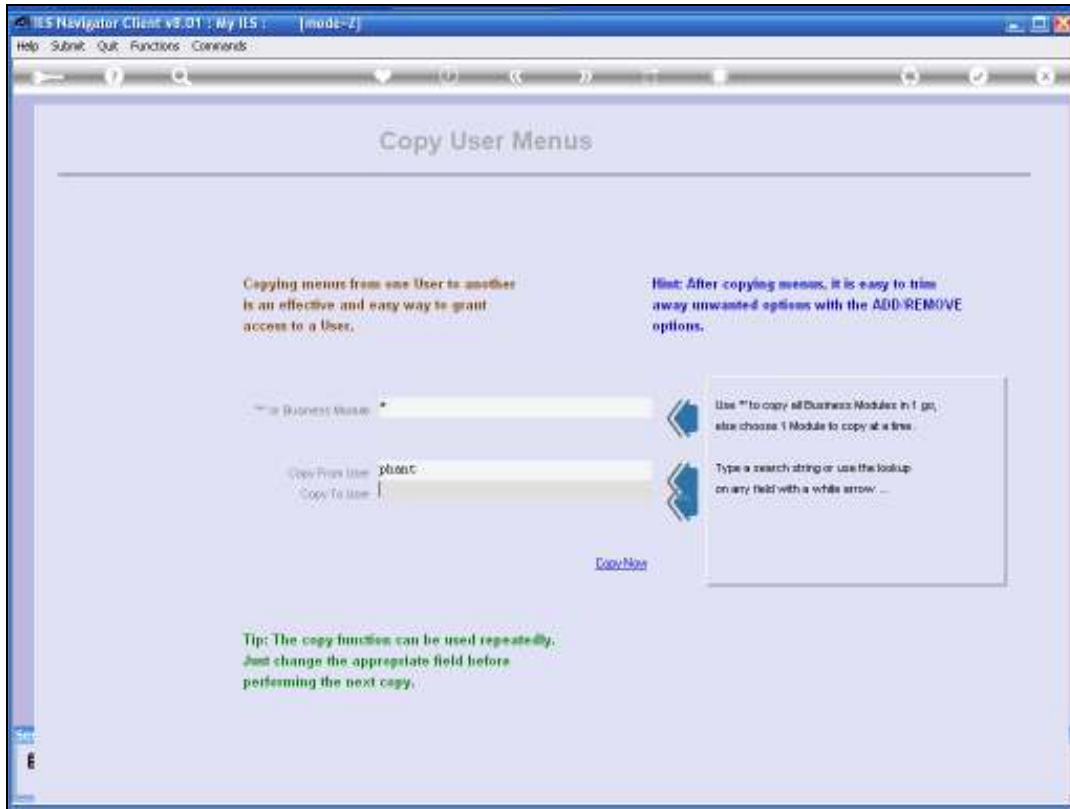
So I am copying all the Modules.



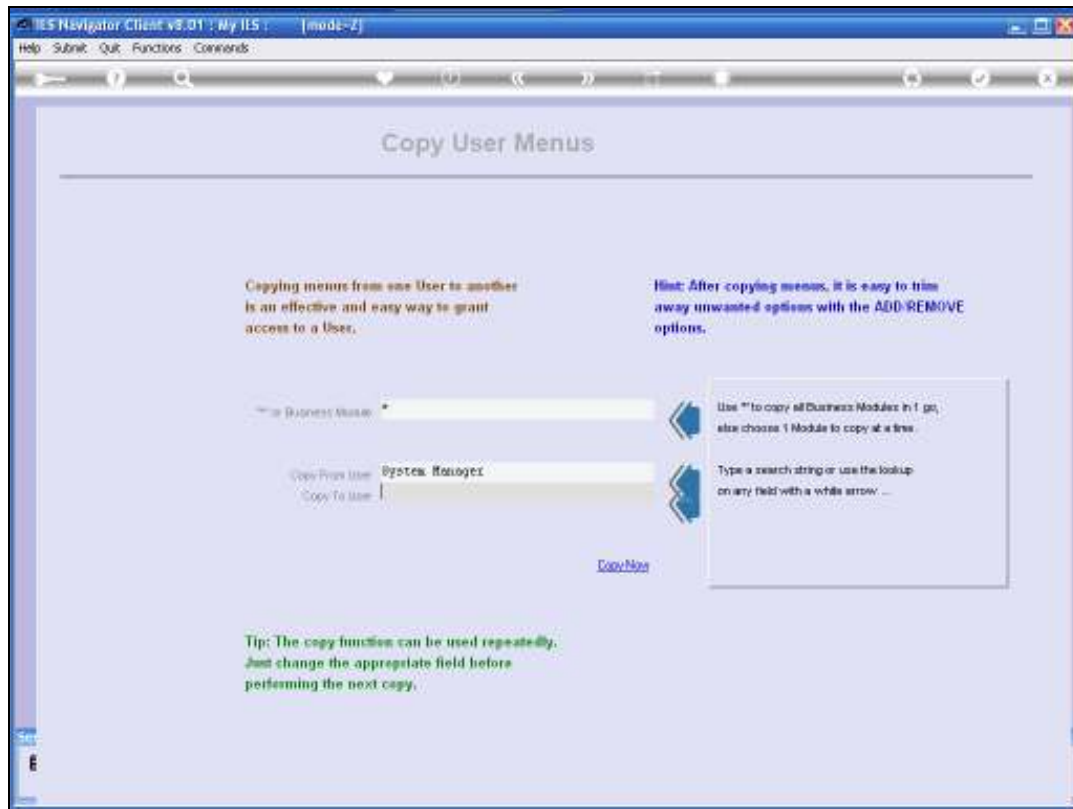
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So I am starting off with a full Menu, because I am Copying from User "phant", which is the System Manager Code, i.e. the Internal System Manager Code.

Now this User Code has got full Access. So if I start with that, and then trim off anything that is unwanted, then I am sure I've got all the Options to deal with what I would wish to deal with.



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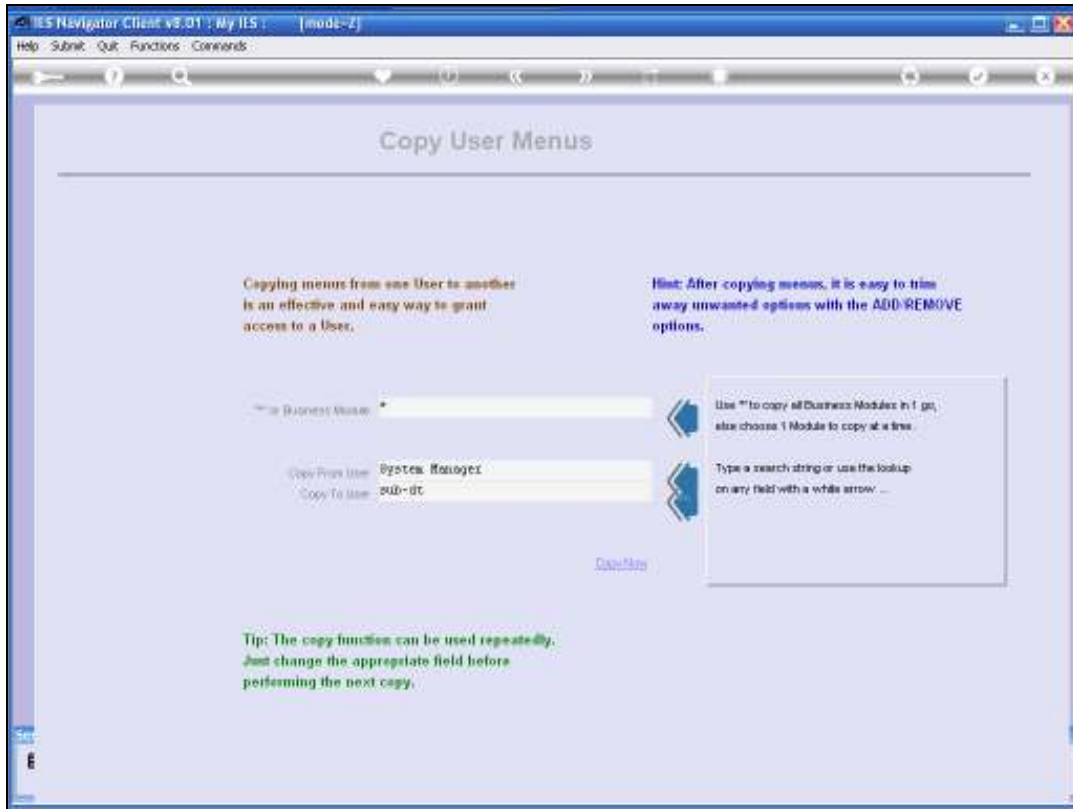


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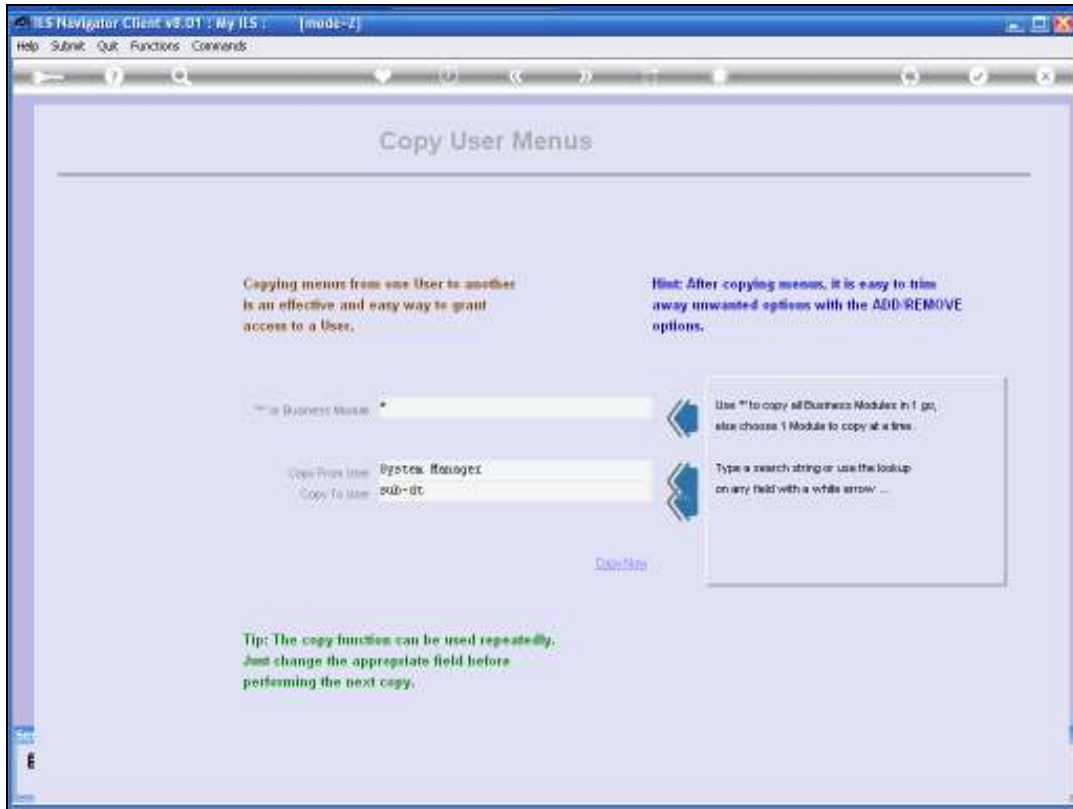
And of course I am copying to the new User Code, which is the Subscription User Code. Now notice that in my example I am using a User Code "sub-dt", because my intention is, that this User Code is going to be a Subscription Profile for a Debtors clerk position in the Company.

Now the "sub-" in front is just a way that I do my Profiles, so that I can separate my Subscription Profiles from the normal User Codes.

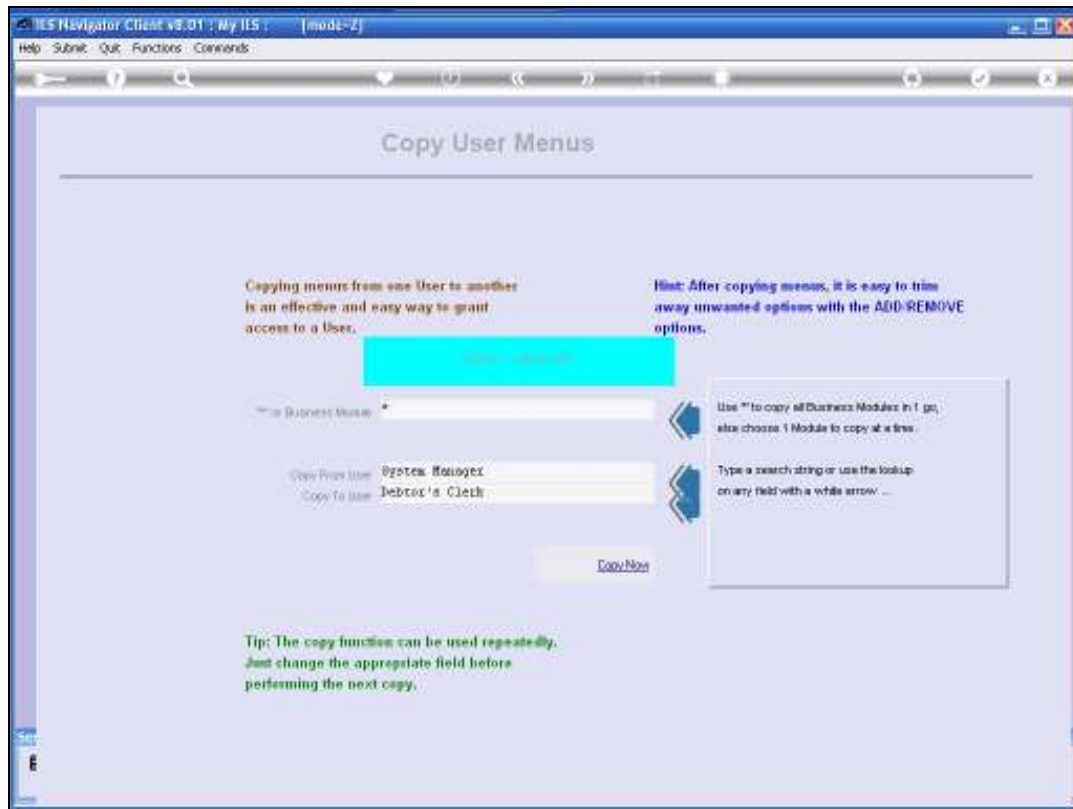
I do it in the Code for easy recognition although it is not required. Just a good idea.



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So the System now copies all the Menus because I have included all Business Modules, by stating "*" (asterisk).

The system now copies all the Menus from the System Manager to this New Debtors clerk profile.



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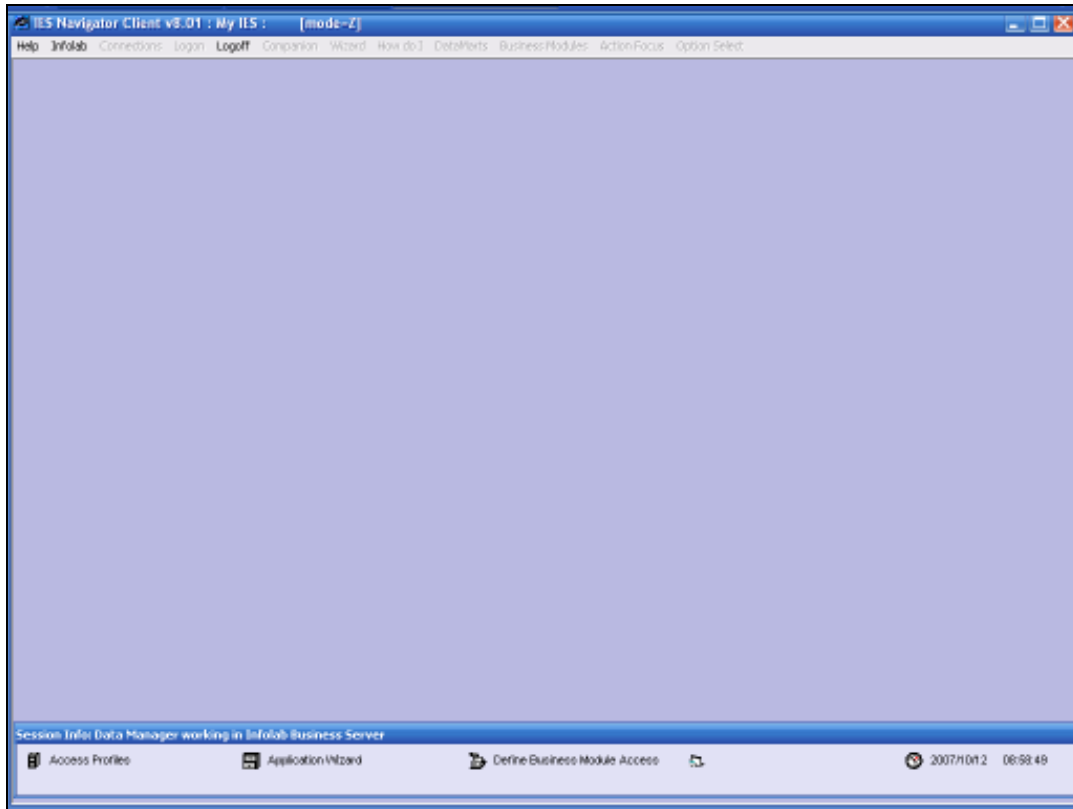


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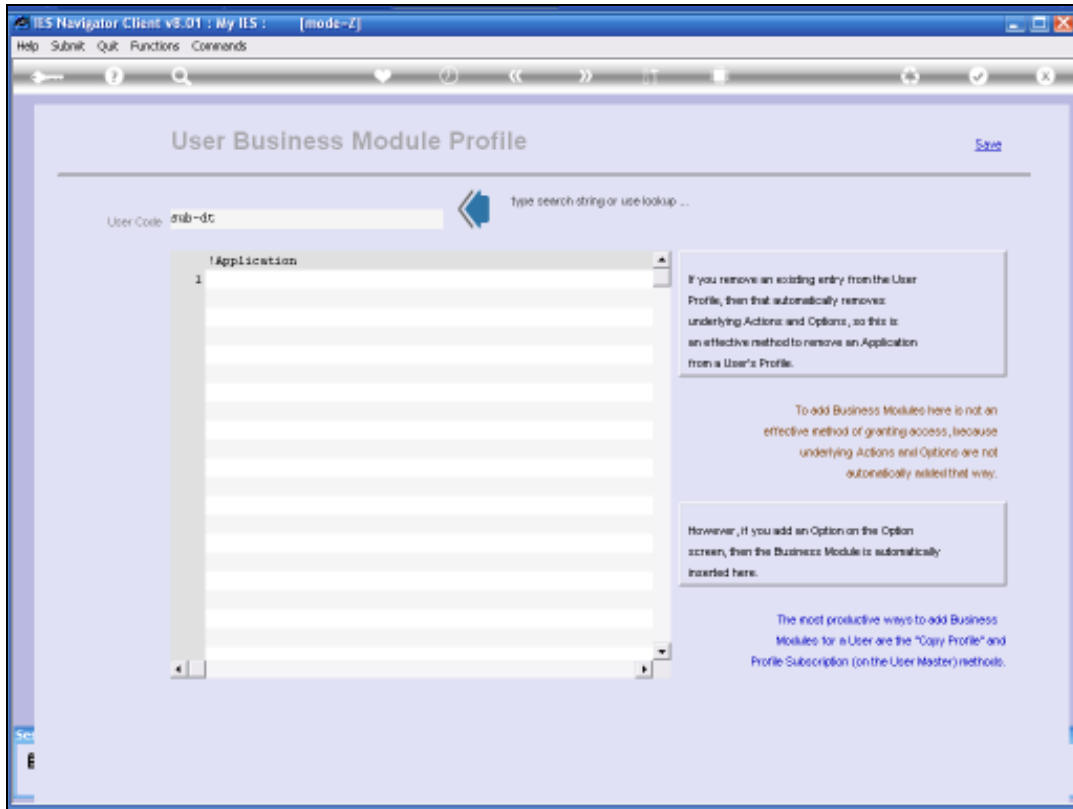


Slide 23

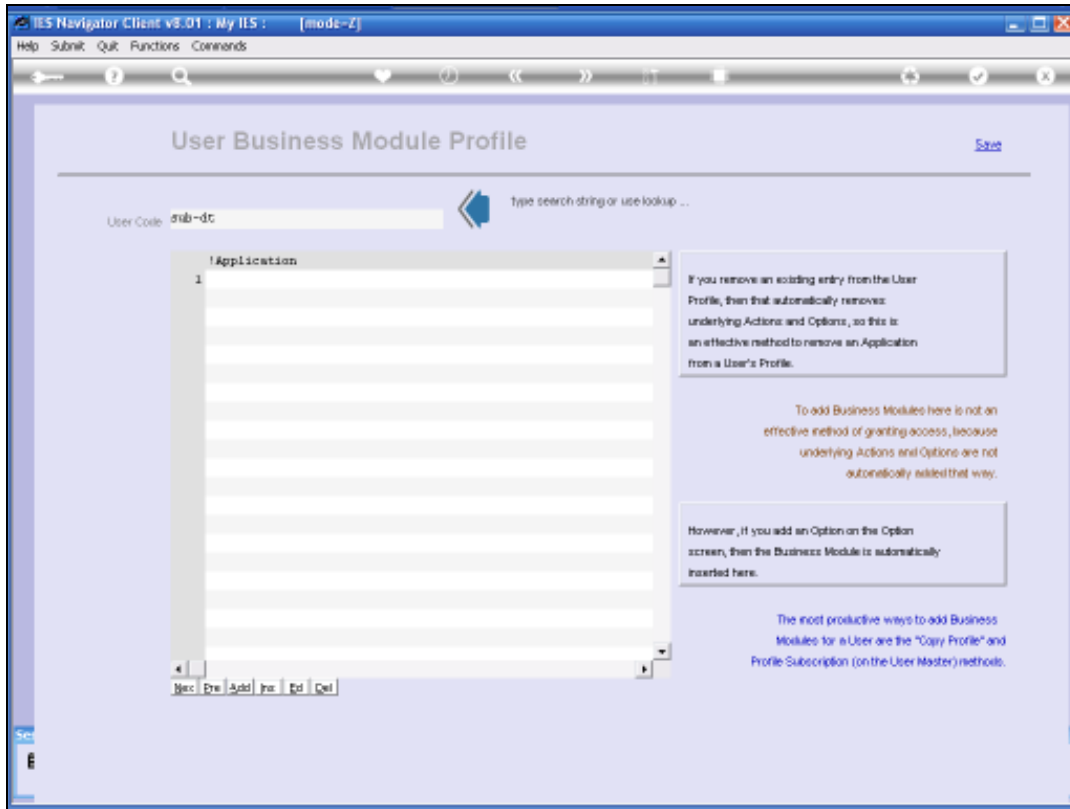
And now all I have to do is go to the Capture Methods. I start at the Business Module level and I am going to "trim off" this list of Menus that the New User Code now has. I am going to trim off all the Business Modules that should not be on that Profile. Then I am going to the Actions and then to Options, if necessary, to trim away any Options that this User Code or Profile should not have.



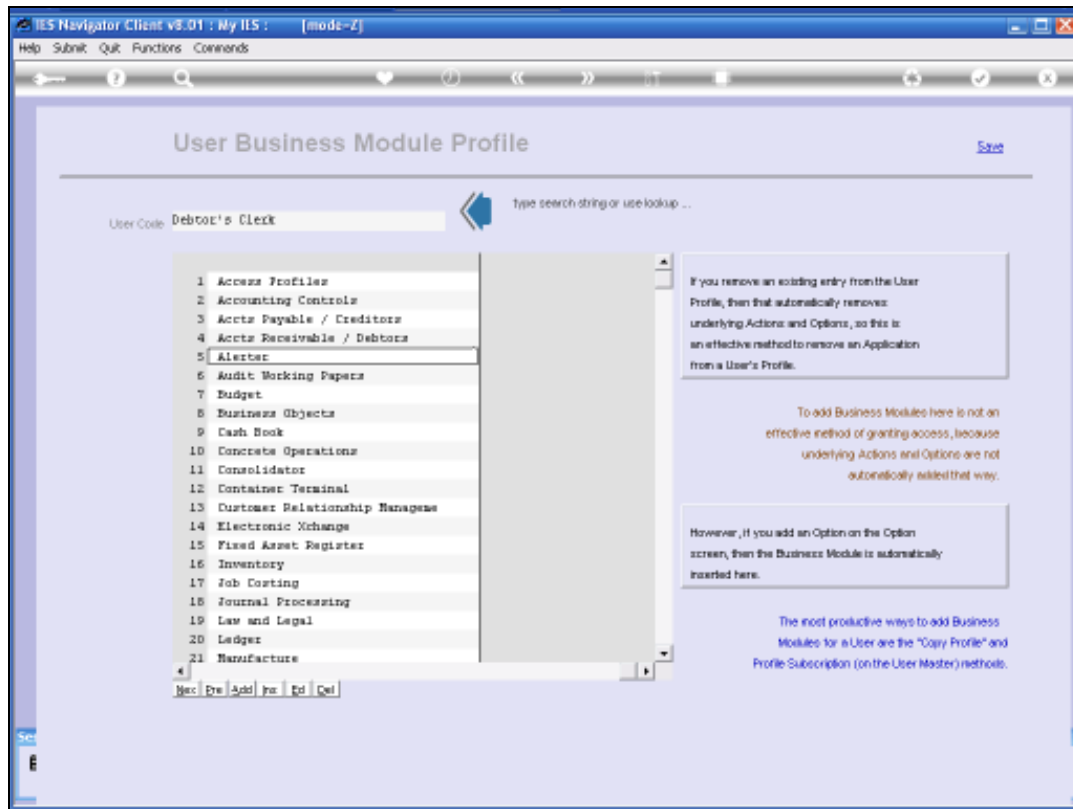
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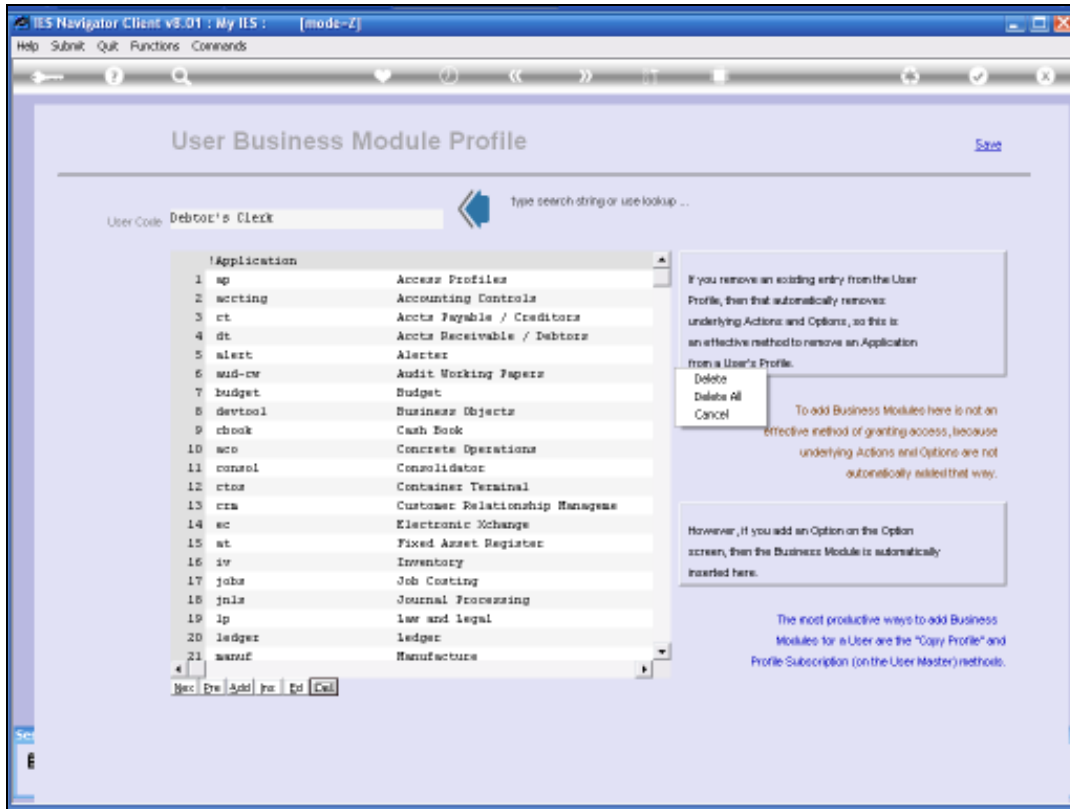


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So I can now trim, 1st of all, all the Business Modules that should not be on this Profile. After that for the remaining Business Profiles, I may go to each of these Business Modules in turn, at the Actions level, and remove any Actions that are not required. After that, for each Business Module and Action, I could go into the Options Level, and trim off any Options that are not required. Then I end up with a Profile that I want for this new User Code, which is a Subscription Profile.



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I can also use the Access Report during this Process of Trimming, to verify all the Menu Options that remain and are present on this Profile, until I am satisfied that the Profile is now the way that we want it to be.

The screenshot shows the 'User Business Module Profile' interface. At the top, the title bar reads 'IES Navigator Client vs.01: My IIS: [mode-Z]'. Below the title bar is a menu with 'Help', 'Submit', 'Quit', 'Functions', and 'Comments'. The main content area has a search bar with 'Debtors Clerk' entered and a search icon. Below the search bar is a list of applications:

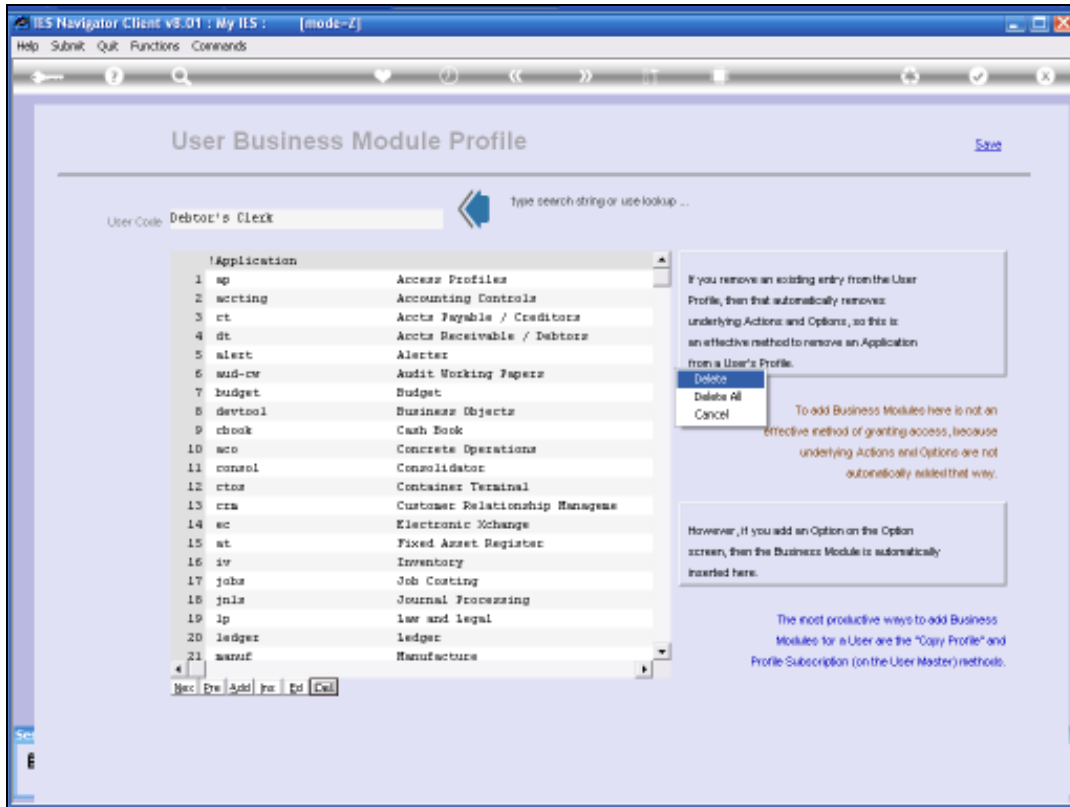
Application	
1	ap Access Profiles
2	accting Accounting Controls
3	ct Accts Payable / Creditors
4	dt Accts Receivable / Debtors
5	alert Alert
6	aud-wr Audit Working Papers
7	budget Budget
8	devtool Business Objects
9	cbok Cash Book
10	acc Concrete Operations
11	consol Consolidator
12	ctos Container Terminal
13	cra Customer Relationship Manage
14	ec Electronic Exchange
15	at Fixed Asset Register
16	iv Inventory
17	joba Job Costing
18	jpls Journal Processing
19	lp Law and Legal
20	ledger Ledger
21	manuf Manufacture

At the bottom of the application list are buttons: 'New', 'Edit', 'Add', 'Print', and 'Call'. To the right of the application list, there are three text boxes providing instructions:

- Top Box:** "If you remove an existing entry from the User Profile, then that automatically removes underlying Actions and Options, so this is an effective method to remove an Application from a User's Profile." Below this is a small dialog box with 'Delete', 'Delete All', and 'Cancel' buttons.
- Middle Box:** "To add Business Modules here is not an effective method of granting access, because underlying Actions and Options are not automatically added that way."
- Bottom Box:** "However, if you add an Option on the Option screen, then the Business Module is automatically inserted here."

At the bottom right, there is a blue text box: "The most productive ways to add Business Modules for a User are the 'Copy Profile' and Profile Subscription (on the User Master) methods."

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The screenshot shows the IES Navigator Client interface. The title bar reads "IES Navigator Client v8.01 : My IIS : [mode-z]". The menu bar includes "Help", "Submit", "Quit", "Functions", and "Commands". The main content area is titled "User Master Record" and contains the following fields and sections:

- User Code:** subdp-dc
- User Name:** Debtors Clerk Business Profiles
- Address Ad:** Debtors
- Password:** CEF2BP89
- E-Mail Address:**
- Timeout:** 600
- Language Pref:** ENG: English
- User Group:**
- Multi Sessions:** 2
- Rep/Voice Lin:** 50

Additional features and sections include:

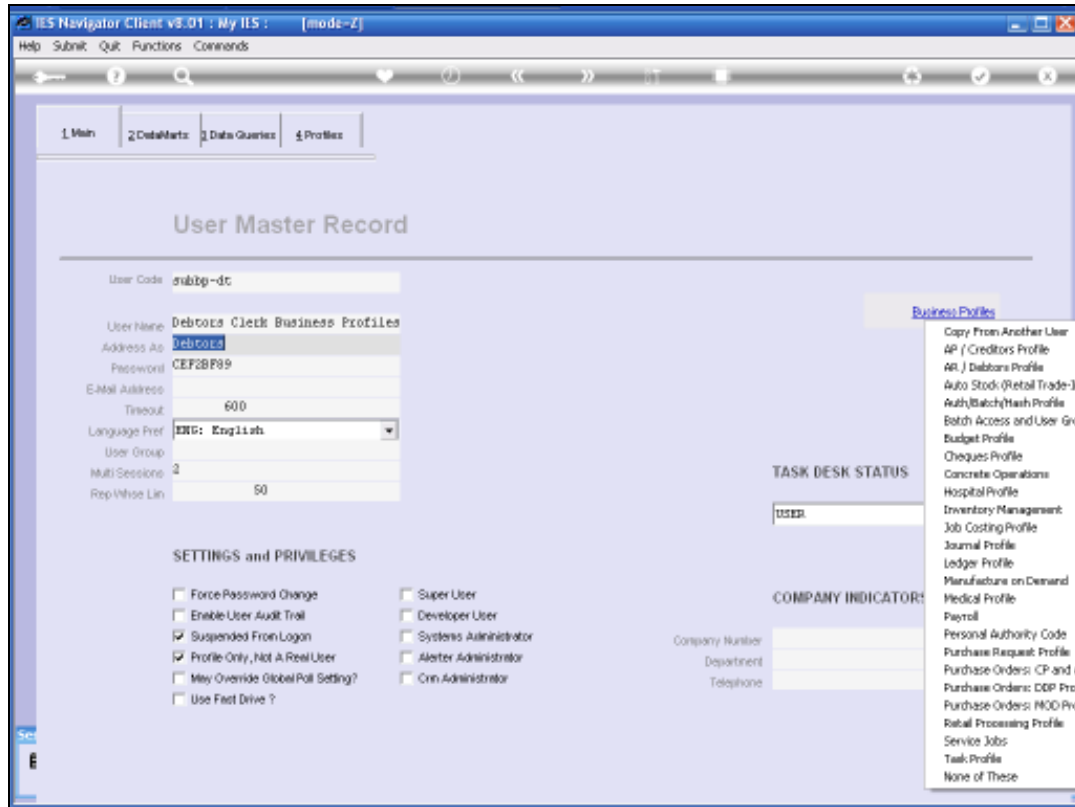
- Business Profiles:** A link to view business profiles.
- Update:** A link to update the user record.
- TASK DESK STATUS:** A dropdown menu currently set to "USER".
- SETTINGS and PRIVILEGES:**
 - Force Password Change
 - Enable User Audit Trail
 - Suspended From Logon
 - Profile Only, Not a Real User
 - May Override Global Roll Setting?
 - Use Fast Drive ?
 - Super User
 - Developer User
 - Systems Administrator
 - Alerter Administrator
 - Crim Administrator
- COMPANY INDICATORS:**
 - Company Number: _____
 - Department: _____
 - Telephone: _____

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Now we have dealt with the Subscription Profile for Menu Options. We also have the Business Profiles. And Business Profiles are not directly subscribed to, although at initial User creation when the "mirror access" option is used, the Business Profiles of the User being mirrored will also be applied.

We can make it easier to set up Users, by also having Non Logon User Codes, with some Business Profiles that they own, and that we can simply copy from.

So if for example, we are Setting up the Profiles for a position like a Debtors Clerk in the Company, then when we employ a new Debtors Clerk, we can simply Subscribe the New User to that particular Profile.



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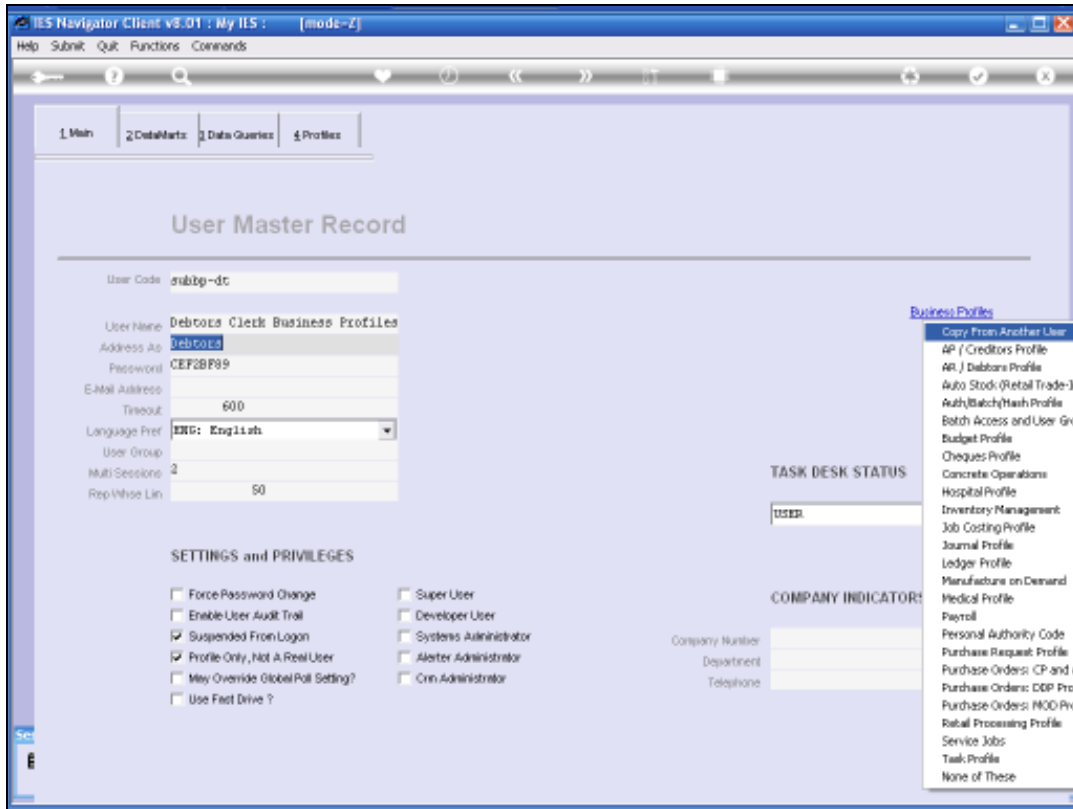
Then in that case, I could also show this example where I make a New User Code, in the same fashion as the 1st one, for the Subscription Profile.

But this time I call it "subbp-dt".

And that is for the copying of mirroring of Business Profiles.

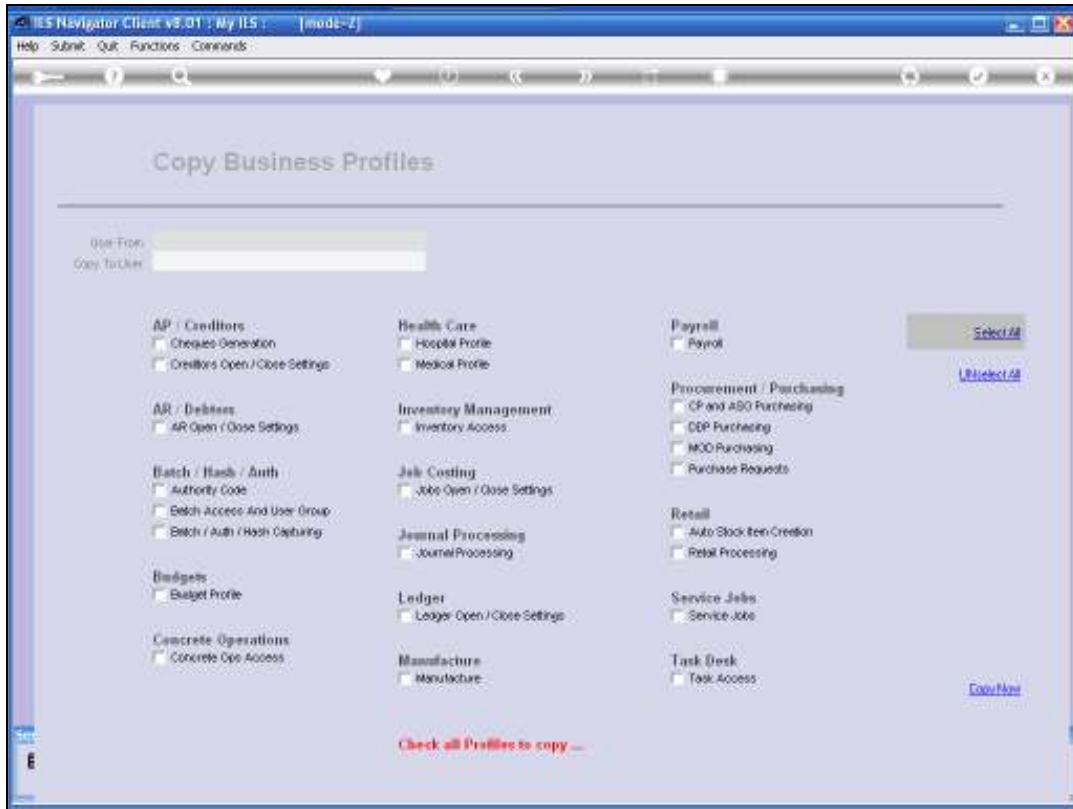
Although it is in Subscription, I simply use this particular User Code to Copy the necessary Business Profiles to the New User.

So I have made this User code the same way as the 1st one.

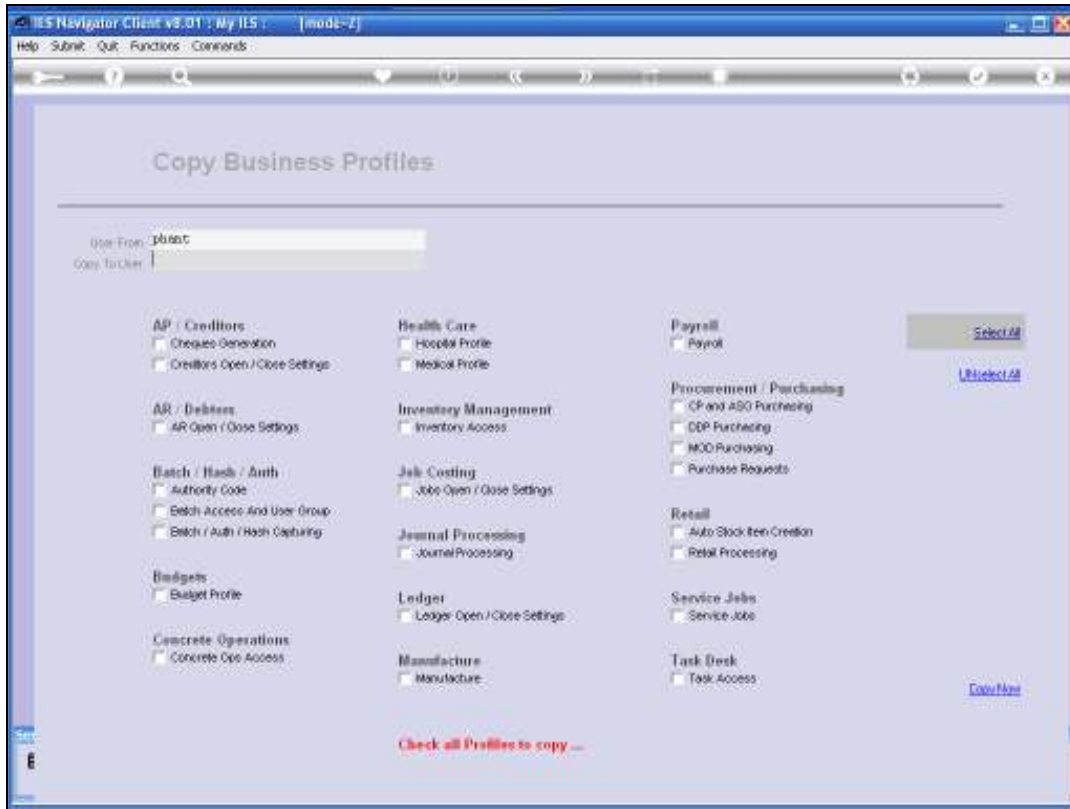


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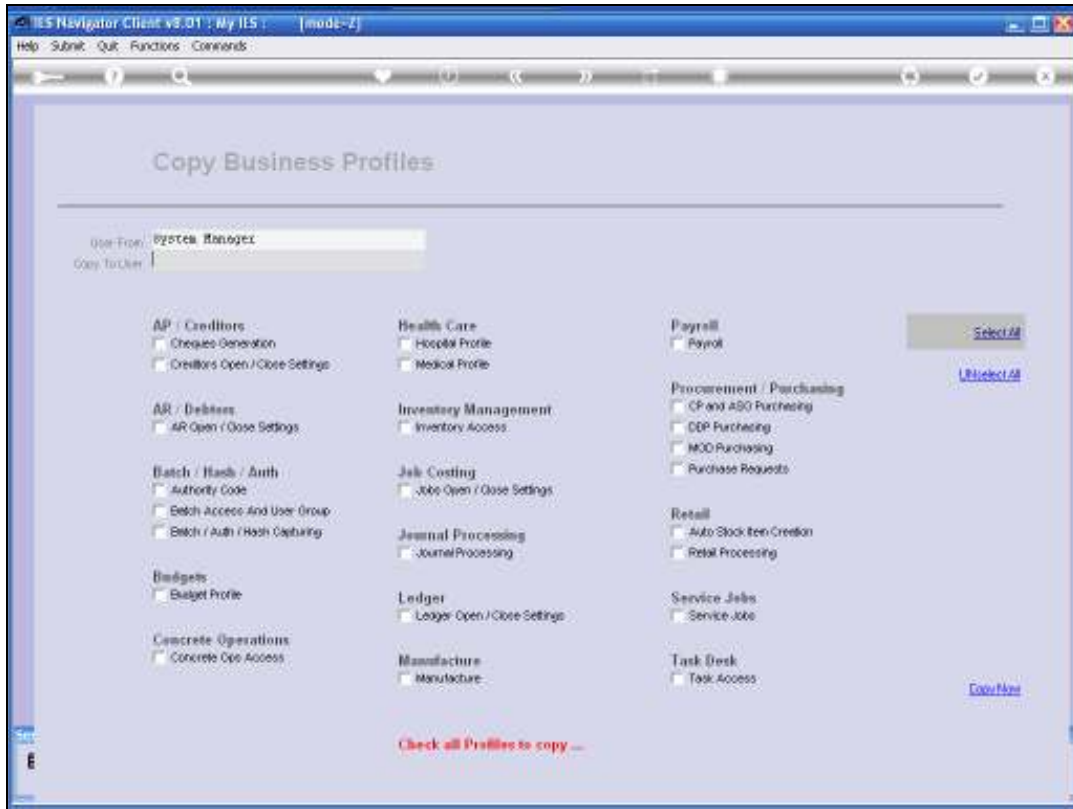
Now I go to Business Profiles, and I choose "Copy From Another User".



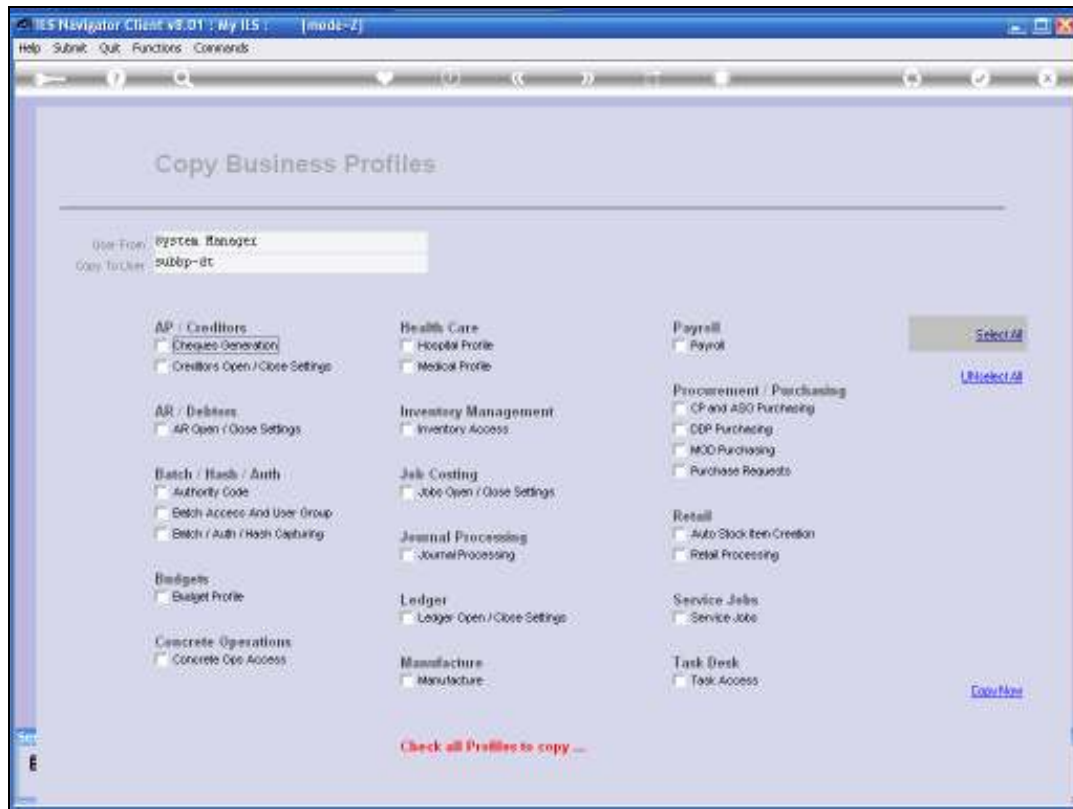
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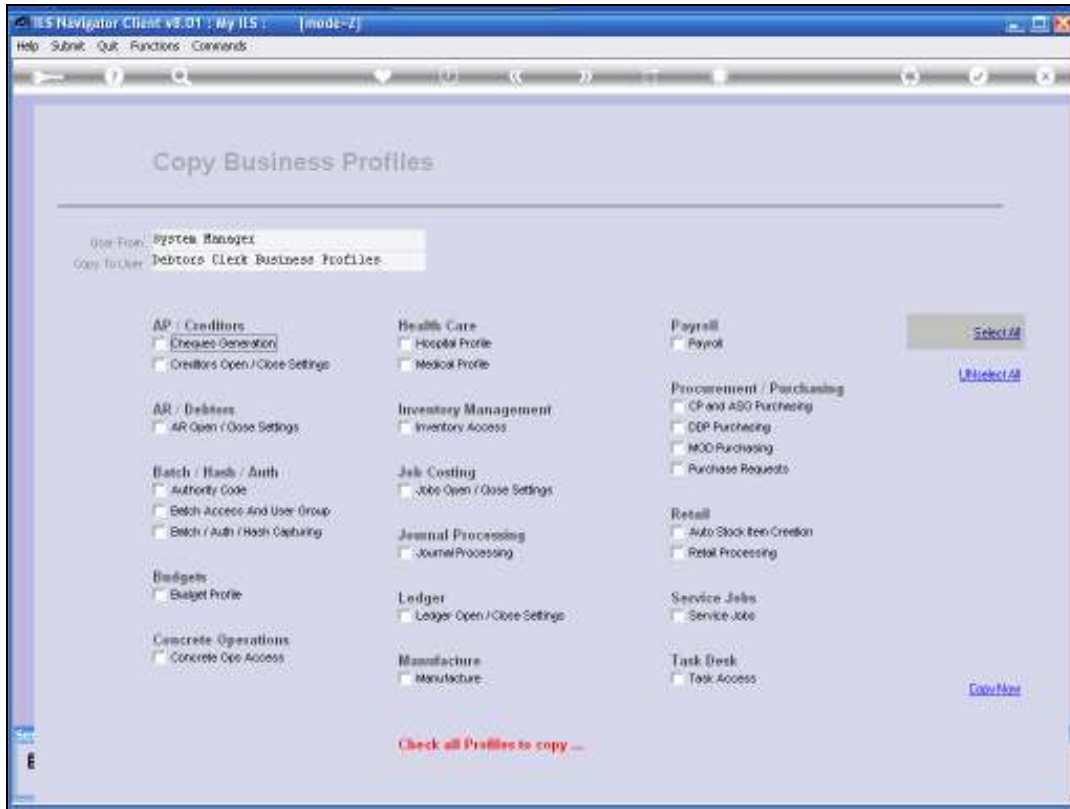


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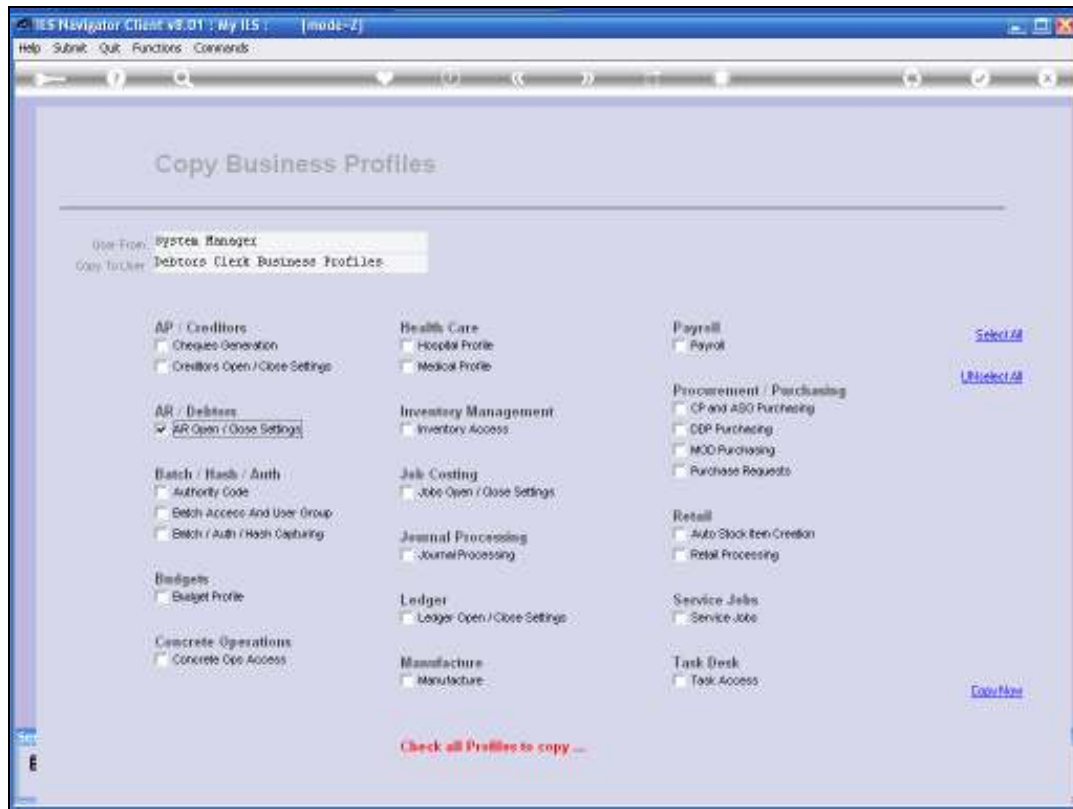
All I do now is to Copy from a suitable User, some Business Profiles that should now belong to this User Code.

And then I can subsequently go to any of these Profiles that I have Copied, for this particular User, and also work on them. I can change them, as they should be, with the necessary Privileges on each Profile, as they should be, for this particular position.

Then afterwards, I can use this same "Copy From" Option, when I set up a New User and just copy from this User to the new real User that I am busy setting up.



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And so we can see that even though Business Profiles are not Subscribed to, we can still have pre-defined Business Profiles for various Non-Logon Users that are appropriate for simply copying to New Users when we set them up.

Then we do not have a lot of work to do on the Business Profiles when we set up a New User.