

 **ROLES**

Data managed in Sunflower is grouped into modules based on the type of management activities performed during an asset's lifecycle. Depending upon the organizational structure and processes, different users may manage the various aspects of an asset at each stage of an asset's lifecycle. For example, property custodians may manage Inventory and Agreement Assets and conduct physical inventories, therefore they should be provided with access to the Management, Agreement and Review modules. The organization's accountants, on the other hand, may only be provided with access to the Finance module so they can manage assets' financial transactions.

Sunflower provides a variety of roles that ensures organizations can maintain a proper separation of duties amongst their Sunflower users. This chapter provides an overview of Sunflower's roles. More detailed information on roles for specific modules can be found in each of this user guide's chapters.

KEY CONCEPTS

This chapter includes the following discussion points and concepts:

- Role-Based Access
- Roles At a Glance
- Role Basics
- Organization Contacts
- Organization Contact Types

ROLE-BASED ACCESS

One of the Sunflower Administrator's primary support functions will be to ensure users have access to the appropriate Sunflower forms and asset records. As users move about (transfer) within an organization, the Administrator must work closely with management to determine any changes to users' access.

Each module within Sunflower is accessible through one or more predefined roles. Every user working within Sunflower is assigned a username, password, and one or more roles. Not only are roles an integral component of the Sunflower application's security, they also control the views and screens within which a user is authorized to work, thereby helping maintain an organization's separation of duties.

The two primary roles for each Sunflower module are **Managers** and **Clerks**. **Managers** have access to all the forms within a given module, and can transact on any and all asset records within that module; whereas **Clerks** have a much more limited access to assets (usually to a designated organization) within a specific module.

For example: an Inventory Manager can manage (create, update, or retire) any asset in the Management module. That Manager may be responsible for three or more distinct organizations (departments, divisions, or projects) with an Inventory Clerk assigned to each one. The Inventory Clerks only have the ability to manage (create, update, or retire) assets within their specifically assigned organization.

ROLES AT A GLANCE

The following table outlines the roles available in Sunflower. This table provides a brief description of each role and the transactions that role can conduct. A more detailed explanation of which forms each role has access to can be found in each module's chapter within this user guide.

At a glance, Sunflower provides the following roles:

MODULE	INFORMAL ROLE NAME	DATABASE ROLE NAME	DESCRIPTION/ EXPLANATION
Administration	Administrator	AS_ADMINISTRATOR	Perform overall setup and maintenance.
	Domain	AS_DOMAIN_ADMINISTRATOR	Administration module access only.
Agreement	Agreement Clerk	AS_AGREEMENT_CLERK	Manage specific Org. AGR assets.
	Agreement Manager	AS_AGREEMENT_MANAGER	Manage all AGR agreements & assets.
Asset Configuration*	Asset Configuration*	AS_ASSET_CONFIGURATION*	Required for a user to be assigned the configuration module specific roles.
	Configuration Query Only	CONFIGURATION QUERY ONLY	View asset configuration Summary and History and configuration reports.
	Configuration Clerk	CONFIGURATION CLERK	Create and update asset configurations, view asset configuration Summary and History and configuration reports.
	Configuration Manager	CONFIGURATION MANAGER	Create and update configuration templates and asset configurations, view asset configuration Summary and History and configuration reports.
	Kitting Query Only	KITTING QUERY ONLY	View asset kit Summary and History and kit reports.
	Kitting Clerk	KITTING CLERK	Create and update asset kits, view asset kit Summary and History and kit reports.
	Kitting Manager	KITTING MANAGER	Create and update kit templates and asset kits, view asset kit Summary and History and kit reports.
	Print Manager	PRINT MANAGER	Maintain label templates and print barcodes.
	Interest Configuration roles	AGREEMENT, EXCESS, FINANCIAL, INACTIVE, INVENTORY CONFIGURATION	Add and remove assets with the various interest types on configurations and kits.

MODULE	INFORMAL ROLE NAME	DATABASE ROLE NAME	DESCRIPTION/ EXPLANATION
Asset Mapping	Sunflower Users	N/A	Search, view, and print maps.
	Map Upload and Tag	SA_MAP_UPLOAD_TAG	Upload, tag, and update maps.
	Map Population	SA_MAP_POPULATE	Import assets to a map.
	Map Deletion	SA_MAP_DELETE	Delete maps.
	Map Administrator	SA_MAP_ADMINISTRATOR	Upload maps, import assets to maps, update maps, and delete maps.
Excess	ACR (Asset Center Representative)	AS_ASSET_CENTER_REPRESENTATIVE	Limited management of existing EX assets.
	Excess Clerk	AS_EXCESS_CLERK	Manage specific Org. EX assets.
	Excess Manager	AS_EXCESS_MANAGER	Manage all EX assets.
Finance	Financial Clerk	AS_FINANCIAL_CLERK	Manage specific Org. FN assets.
	Financial Manager	AS_FINANCIAL_MANAGER	Manage all FN assets.
Inactive	ACR (Asset Center Representative)	AS_ASSET_CENTER_REPRESENTATIVE	Limited management of existing INA assets.
	Inactive Clerk	AS_INACTIVE_CLERK	Manage specific Org. INA assets.
	Inactive Manager	AS_INACTIVE_MANAGER	Manage all INA assets.
IT Components	IT Clerk	AS_IT_CLERK	Manage IT components.
	IT Manager	AS_IT_MANAGER	Manage all IT assets & assign IT Clerks.
Maintenance	Maintenance Clerk	AS_MAINTENANCE_CLERK	Maintain work orders, tasks, and meter readings.
	Maintenance Planner	AS_MAINTENANCE_PLANNER	Maintain work orders and tasks, meter and PM schedule assignments, and meter readings.
	Maintenance Manager	AS_MAINTENANCE_MANAGER	Maintain maintenance-related domains; define work order templates, PM schedules, and meters; and all Planner and Clerk tasks.
	Interest Asset Maintenance Roles	AS_AGREEMENT_MAINTENANCE, AS_EXCESS_MAINTENANCE, AS_FINANCIAL_MAINTENANCE, AS_INACTIVE_MAINTENANCE and AS_INVENTORY_MAINTENANCE	Add and remove assets with the various interest types on maintenance tasks.
Management	ACR (Asset Center Representative)	AS_ASSET_CENTER_REPRESENTATIVE	Limited management of existing INV assets.
	Inventory Clerk	AS_INVENTORY_CLERK	Manage specific Org. INV assets.
	Inventory Manager	AS_INVENTORY_MANAGER	Manage all INV assets.

MODULE	INFORMAL ROLE NAME	DATABASE ROLE NAME	DESCRIPTION/ EXPLANATION
Review	Review Clerk	AS_REVIEW_CLERK	Maintain review campaigns and log resolutions.
	Review Manager	AS_REVIEW_MANAGER	Define & manage review campaigns & ACR duties for specific organizations.
Additional Roles	Cataloger	AS_CATALOGER	Create & modify Catalog items and Manufacturer Organizations.
	Custodian	AS_CUSTODIAN	Make changes to assets to which they are assigned as Custodian.
	Developer	AS_DEVELOPER	Limited to Sunflower Developers only.
	Encrypt Decrypt	AS_ENCRYPT_DECRYPT	Supplemental role to specify the desired fields for encryption.
	Job User	AS_JOB_USER	Used to perform automated processes such as predefined batching & interfacing.
	Proxy User	AS_PROXY_USER	The Proxy User, AKA the Sunflower Proxy, is a user ID that contains all of the Sunflower Assets roles. The Proxy User role is used for calling APIs and authenticating users. This role is not assigned to a user but used by default behind the scenes if implementing proxy user authentication.
	Query Only	AS_QUERY_ONLY	Read only viewing, no data entry ability.
	Subset Manager	AS_SUBSET_MANAGER	Manage Parent/Child Relationships from interest modules.
	Trace	SA_TRACE	Used by an Administrator to solve issues.
	User	AS_USER	Make very limited changes to assets to which they are assigned as the User.
Web Reports User	AS_WEB_REPORTS_USER	Allows view-only access to reports.	

*The roles for Asset Configuration Application are located on a different tab on the Maintain Registered Users Screen called "Asset Configuration Application Roles". In order to assign a user any Asset Configuration or Kitting roles to a user, the user must first be assigned the role of "AS_ASSET_CONFIGURATION" on the "Granted Roles" tab. Asset Configuration Roles are only applicable when a user has "AS_ASSET_CONFIGURATION" role.

ROLE BASICS

Each Interest Asset module role differs in the nature of its privileges and complexity. Before discussing the specifics of each role, there are some general similarities in structure that will help users understand some of the basic concepts of roles and their privileges within Sunflower.

Comparing the various roles available in Sunflower, each of the modules has two recurring roles, a **Clerk** and a **Manager**. The exception is the **Management** module where an additional role, the **Asset Center Representative** (ACR), is available. Between the Manager and Clerk roles, the **Manager** has access to all screens and can manage all assets within a respective module. Additionally, a Manager can access certain sets of screens in the **Administration** module while the **Clerk** has little or no access to this module.

The **Asset Center Representative** role in the **Management** module limits users to updating asset records only. Asset Center Representative cannot add or retire asset records.

CLERKS

Taking a closer look at the responsibilities of **Clerks** and **Managers**, the difference in privilege and responsibility is similar to that found in many organizations. **Clerks**, under the supervision of a higher authority, perform a variety of regular predefined tasks and duties based on established practices and procedures. Specific duties will vary based on the module (e.g. Management, Review, Administration, etc.) for which the Clerk operates. For example, a **Review Clerk** is responsible for taking physical inventory of an organization's assets.

MANAGERS

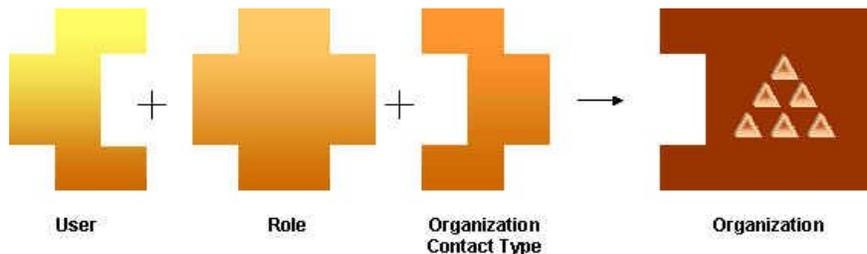
Managers are distinguished from **Clerks** by their greater breadth of responsibility. **Managers** have access to all functionality, screens, and operations in their respective modules, while **Clerks** have restricted access to functionality, screens, and operations for their respective organizations. Additionally, **Clerks** cannot perform administrative tasks, which could include defining a list of values and setting various parameters.

ORGANIZATION CONTACTS

Since Clerks are limited to managing assets within a distinct organization, users assigned the Clerk roles must also be assigned as an Asset Center Representative **Organization Contact Type** for their respective organization.

Organization Contacts enable users to work with assets based on the organizations to which they are assigned. Because an asset belongs to an organization, organizations can control which users are able to work (e.g. create assets, change asset information, etc.) with a group of assets based on the organization to which they belong.

The graphic below illustrates the user - role - organization relationship:



Roles are assigned to users to control the functions that they are able to perform. Assigning an organization contact type and organization is required when the role is a **Review Manager, Agreement Clerk, Inventory Clerk, Finance Clerk, or IT Clerk**.

Tip: This composite assignment enables those roles to work with assets for the specified organizations. Inventory Clerk is an inventory module role. A Review Manager is a review module role. What is important about each of the roles is how that role, in conjunction with an organization and Organization Contact Type, enables each role to work within its respective Sunflower Enterprise module.

ORGANIZATION CONTACT TYPES

Organization Contacts contain an attribute called the Organization Contact Type. The Organization Contact Type enables a user, with a properly assigned role, to manage assets.

The Asset Center Representative Contact Type should not be confused with the ACR role. Additional Organization Contact Types can be defined; however, the definition of new Organization Contact Types requires additional coding to provide the same functionality that is enabled by the factory delivered values.

Organization Contact Types enable specific Sunflower application roles to work with assets or asset components. Within their respective modules, Administrators and Managers are responsible for the assignment of Organization Contact Types. For example, Administrators and Inventory Managers assign Inventory Clerks and ACRs as Asset Center Representatives for the organizations for which they are responsible.

A Primary Organization Contact is another concept that clients can employ when defining Organization Contact Types. Use the primary Organization Contact to specify the person who is the main point of contact for an organization. This enables other users to know who to contact within an organization should there be a question or issue about an asset. The name of the primary contact displays in the Rep field on the asset record.

Each organization can have only one Primary Contact, however several backup Contacts may be assigned to each organization. Backup Contacts have the same privileges as Primary Contacts, the main difference being that the Backup Contact's name will not appear in the Rep field on the asset record.

For more information on the roles, please refer to the beginning of each of the chapters within this user guide.