



Users Window

OnCommand Workflow Automation

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Users Window

The Users window enables you to view, create, edit, and delete the OnCommand Workflow Automation (WFA) users. You can access this window by selecting **Settings**, and under **Management** click **Users**.



Depending on your role and account privileges, this window might not be displayed.

Users table

The Users window displays existing users. You can customize the table display by using the filtering and sorting features available for each column, as well as by rearranging the column order.

- enables or disables filtering for the entire table. A red "x" appears over the icon if filtering is disabled.
- Double-clicking clears and resets the filtering selections.
- on each column header enables you to filter based on the content of the columns. Clicking in a column allows you to filter on a specific item from the drop-down list or on all available items.
- Clicking the column header toggles between ascending and descending order of sorting. You can identify the applied sort order by the sort arrows (for ascending and for descending).
- To rearrange the location of columns, you can drag and drop columns to place them in any required order. However, you cannot hide or delete any of these columns.
- Clicking the **Search** filter text box allows you to search for specific content. In addition, you can search using supported operators for the applicable column type, Alphabetic or Numeric.

The following table lists the supported operators for alphabetic and numeric columns in the Users table, available from the **Search** filter text box.

Alphabetic	Numeric
<ul style="list-style-type: none">• Contains• Does not contain• Starts with• Ends with• Equals• Does not equal• Reset	<ul style="list-style-type: none">• Equals• Does not equal• Less than• Greater than• Less than or equal to• Greater than or equal to• Between• Reset

The Users table contains the following columns:

- **Username**

Displays the user name for the account.

- **Role**

Displays the assigned role for the user. Roles can include any of the following:

- **Guest**

This user can only view the status of a workflow execution or can be notified of a change in the status of a workflow execution.

- **Operator**

This user is allowed to preview and execute workflows for which the user is provided access.

- **Approver**

This user is allowed to preview, execute, approve, and reject workflows for which the user is provided access.



You must provide the email ID of the approver and the status of the workflow that is to be notified to the approver. If there are multiple approvers, you can provide a group email ID in the **E-mail** field.

- **Architect**

This user has full access to create workflows, but is restricted from modifying global WFA server settings.

- **Admin**

This user has complete access to the WFA server.



You must configure at least one admin user.

- **Backup**

This is the only user who can remotely generate backups of the WFA server; however, this user is restricted from all other access.

- **Categories**

Displays the workflow category assigned to an operator, which provides workflow authorization and privileges to the designated operator.

You can set this authorization setting by clicking **Content Management > Categories**.

- **E-mail**

Displays the email address for the user. You can use this email for notification about the workflow status.

- **Notifications Enabled**

Indicates whether the user can receive email notifications (true or false) about the status of workflow executions that were triggered by that user.

- **LDAP**

Indicates whether the user is provisioned through the External Active Directory server accessed by LDAP

(true or false).

- **Active Directory Group**

Indicates whether the user is a part of LDAP or Active Directory groups.

Toolbar

The toolbar is located above the column header. You can use the icons in the toolbar to perform various actions. These actions can also be accessed from the right-click menu in the window.

-  **(New)**

Opens the New User dialog box, which enables you to add a new user account.

-  **(Edit)**

Opens the Edit User dialog box, which enables you to edit the selected user account.

-  **(Delete)**

Opens the Delete User confirmation dialog box, which enables you to delete the selected user account.

New User dialog box

The New User dialog box enables you to create a new user account.

- **Username**

Specifies the user name.

- **Role**

Enables you to select one of the following user roles:

- Guest: This user can only view the status of a workflow execution or can be notified about a change in the status of a workflow execution.
- Operator: This user is allowed to preview and execute workflows for which the user is provided access.
- Architect: This user has full access to create workflows, but is restricted from modifying global WFA server settings.
- Admin: This user has complete access to the WFA server.
- Backup: This user is the only user who can remotely generate backups of the WFA server; however, the user is restricted from all other access.

- **E-mail**

Enables you to specify the user's email address to which notifications are sent if the Notify On option is selected.

- **Password**

Specifies the password for the user.

- **Confirm**

Specifies the password again.

- **Notify On**

Enables you to select when the account user should be notified by email. The workflow execution status notifications are specific to the workflows executed by the user. You can select any combination of the following options:

- Workflow execution started: Notifies the user when the workflow execution begins.
- Workflow execution failed/partially successful: Notifies the user if the workflow execution fails or if workflow has been successfully executed even if one or more steps have failed.

The execution is completed because the failed steps have been configured such that the workflow execution continues even when the step has failed.

- Workflow execution completed successfully: Notifies the user when the workflow execution is completed successfully.
- Workflow execution waiting for approval: Notifies the user if the workflow execution is waiting for approval from either an Operator or Architect user, depending on the WFA configuration setting.
- Acquisition failure: Notifies the user when data acquisition for data sources fails.

This option is enabled only for Admin and Architect users.

Command buttons

- **Save**

Saves the configuration settings and closes the dialog box.

- **Cancel**

Cancels changes, if any, and closes the dialog box.

Edit User dialog box

The Edit User dialog box enables you to view and modify user account settings.

Depending on your account privileges and role, you might not have access to the Users window. However, you can edit the settings for your account by selecting **Settings**, and under **Management** click **Account Settings**.



The fields that are available to you for editing depend on your assigned role and account privileges.

- **Name**

Displays the user name for the user account.

- **Role**

Displays the assigned role for the user account.

- **E-mail**

Specifies the email for the user account to which notifications are sent if a Notify On option is selected.

- **Change password**

Enables you to change the current password for the user account. When this check box is selected, the following fields are required:

- **New Password**--Specifies the new password.
- **Confirm**--Specifies the new password again.

- **Notify On**

Enables you to select when the account user should be notified by email during the workflow execution. When this check box is selected, you can select any combination of the following options:

- Workflow execution started: Notifies the user when the workflow execution begins.
- Workflow execution failed/partially successful: Notifies the user if the workflow execution fails or if workflow has been successfully executed even if one or more steps have failed.

The execution is completed because the failed steps have been configured such that the workflow execution continues even when the step has failed.

- Workflow execution completed successfully: Notifies the user when the workflow execution is completed successfully.
- Workflow execution waiting for approval: Notifies the user if the workflow execution is waiting for approval from either an Operator or Architect user, depending on the WFA configuration setting.
- Acquisition failure: Notifies the user when data acquisition for data sources fails.

This option is enabled only for Admin and Architect users.

Command buttons

- **Save**

Saves the configuration settings and closes the dialog box.

- **Cancel**

Cancels changes, if any, and closes the dialog box.

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