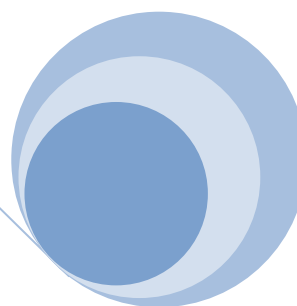
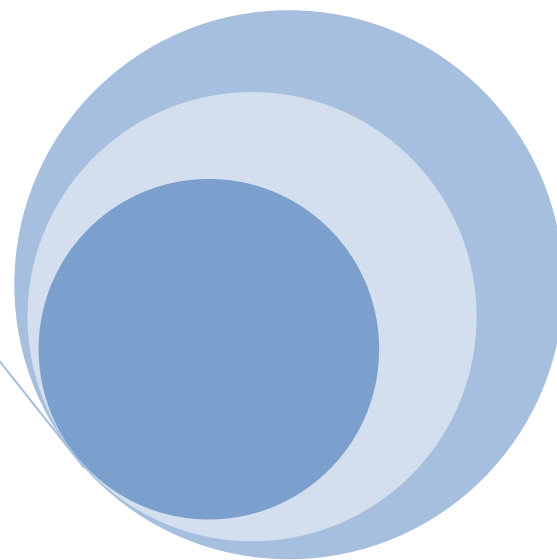




UNSW
THE UNIVERSITY OF NEW SOUTH WALES



Training Guide

FSAM
Training

IT at UNSW

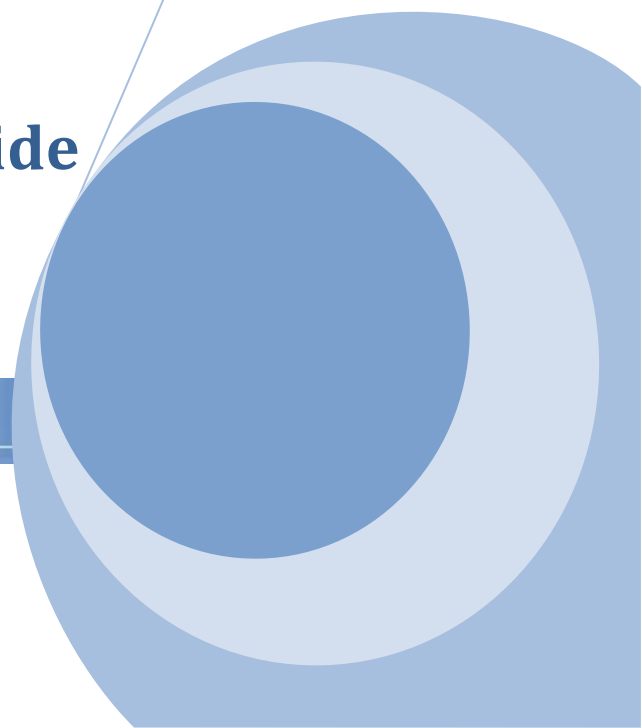


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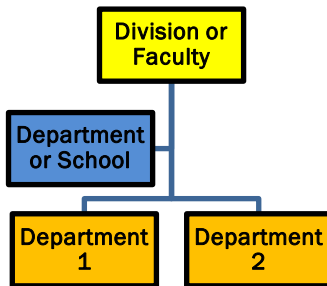
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FSAM TRAINING

Conventions Used in this Manual



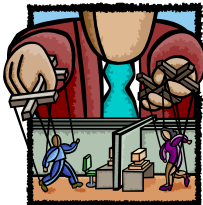
A Topic Overview



Information relating to an ORG (Organisation group)



Information relating to an UDC (User Defined Cohort)



Information relating to an ROLE_MBY group (Role Managing).



Review questions to check knowledge just covered.



Extra information or a tip.

ADVANTAGES OF USING FSAM

FSAM is a self service system using a Workbench that allows users to directly manage group memberships and create user groups without logging a service request to Help Desk.

Using FSAMs Workbench you can:

- ✓ View groups
- ✓ Create requests to add a user to a group
- ✓ Create requests to remove a user from a group
- ✓ Create a User Defined Cohort (UDC)
- ✓ Add members to a UDC
- ✓ Remove members from an ORG, UDC or ROLE_MBY group
- ✓ Nominate who will manage or own the UDC
- ✓ Assign a shared file space for the UDC members
- ✓ Create an e-mail distribution list for the UDC members
- ✓ You can change memberships on any of the group types

Using FSAM means that all of the above actions may be done without involving Help Desk. Instead, when you add or remove a member from a group you are creating a request to the group's owners or managers to authorise your request.

Your request automatically generates an e-mail message which is sent to the group's owners.

A member of the owning or managing group then responds to your request by approving or declining it.

Requests from those with Administrator rights or from members of the owning or managing group are automatically approved. An e-mail message is not generated in these cases.

Introduction

Course Aim

The aim of this workshop is for the attendee to learn about the features of FSAM (File System Access Management). The course is for those who wish to create users and groups to access the UNSW Enterprise File System.

Learning Outcomes

-  **Use the FSAM Screen**
-  **Use the Workbench**
-  **Search for Groups**
-  **Search for Users**
-  **Create a User Defined Cohort**
-  **Allocate a Secure File Space for the Group**
-  **Allocate a Distribution List for the Group**
-  **Use the Hierarchy and Groups**
-  **Add a User to a Group**
-  **Remove a User from a Group**
-  **Manage Requests and Approvals**
-  **Manage and Modify Access Rights**

FSAM TRAINING

Course Modules

Module 1

The aim of module 1 is to learn how to access and navigate the FSAM screen and use the Workbench to search for groups and users.

Module 2

The aim of module 2 is to learn how to add a user to a group, remove a user from a group and manage your requests and approvals.

Module 3

The aim of module 3 is to learn how to create a User Defined Cohort (UDC), add a user to a UDC and remove a user from a UDC.

Module 1

Aims

The aim of module 1 is to learn how to use the FSAM screen and Workbench to search for groups and users.

The aim of module 1 is to learn how to access and navigate the FSAM screen and use the Workbench to search for groups and users.

Topics

In this module you will learn how to:

- 👉 Access the FSAM screen
- 👉 Navigate the FSAM User Interface
- 👉 Use the Workbench
- 👉 Search for Selected Groups
- 👉 Search for Users by Name or zID
- 👉 Recognise Group Types

FSAM OVERVIEW

Topic Overview



This topic introduces the concept and purpose of FSAM (File System Access Management).

- ▶ The university's access security system is based around security groups.
- ▶ FSAM (File System Access Management) has been designed as an easy self service system that allows the end user to self manage the UNSW Enterprise File System.
- ▶ FSAM consists of a Workbench that is the entry point for and base for all access management services.
- ▶ FSAM's Workbench allows a user to create their own user defined cohort (UDC), add users to a group, remove users from a group and create Manage By Groups (ROLE_MBY) to easily control user cohorts. A user can also assign a secure file space for the members of the UDC and /or create an e-mail distribution list if desired.
- ▶ FSAM's Workbench allows a user to manage groups and manage file access permissions without directly accessing Active Directory (AD).

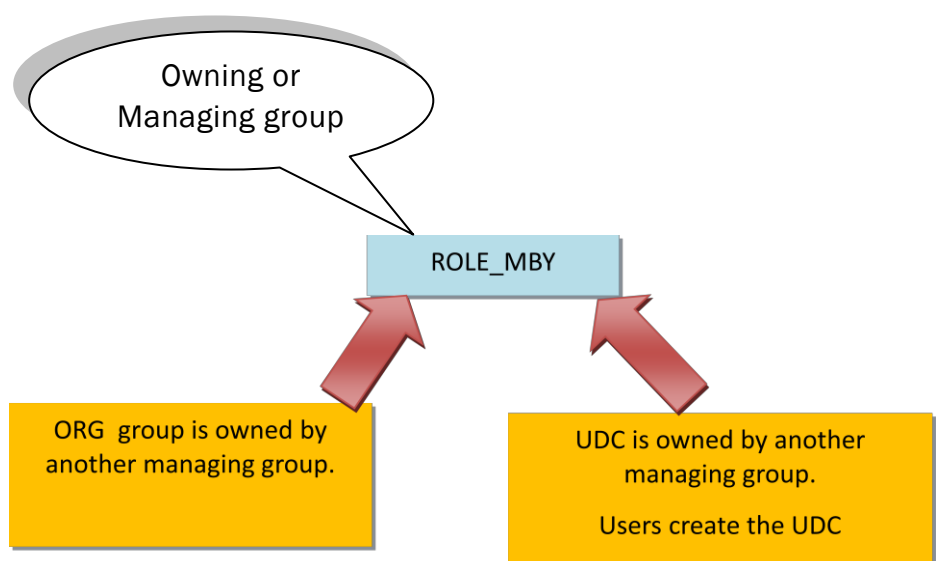


Figure 1 – FSAM Group Concepts diagram

FSAM TRAINING

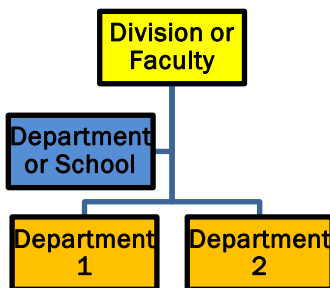
FSAM CONCEPTS

Group Types

FSAM uses three main group types.

These are: **ORG** groups, **User Defined Cohorts (UDC)**, and **ROLE_MBY** groups. These are outlined below.

ORG groups



ORG groups (ORG)

ORG group is the literal **ORG** for **ORG**anisation structure.

- Reflect the organisational structure of the university's organisations
- Are hierarchical
- A lower level ORG group is a member of the ORG group above and so on up to the top level
- There may be up to a maximum four levels giving a total depth of five levels when combined with the Org Unit ID
- Not all Org groups contain members. However, the bottom level ORG groups always contain members
- All ORG group names start with the ORG prefix

FSAM CONCEPTS

Group Types

UDC



User Defined Cohort (UDC)

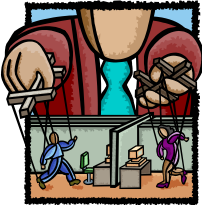
- A collection of people created by a user
- Reflects a group of people with a common role, interest, tasks or project.
- A group of people who need a secure shared file space and resources and / or a e-mail distribution list
- UDC's may only contain members
- A UDC is always owned, managed or attached to another group in the University's organisational structure.
- A UDC may be owned or managed by any of the following groups:
 - ▶ ORG group
 - ▶ UDC
 - ▶ Management Group (ROLE_MBY)
 - ▶ Two to three members of the group nominated as managers
- The creation of a UDC must be approved by the owners of the group under which it is created. When creating a UDC it is important to locate it under the relevant ORG (faculty or division)
- All UDC names start with the UDC prefix

FSAM TRAINING

FSAM CONCEPTS

Group Types

ROLE_MBY



ROLE_MBY groups

ROLE_MBY is the literal for Managed By Group.

- Management Groups (ROLE_MBY) are groups of users that are created solely for the management of one or more Organisational groups or User Defined Cohorts.
- Members of a ROLE_MBY group may add and remove members, approve and reject requests, set and modify permissions to files and folders.
- When a UDC has a list of members as its owner; a managed by group (ROLE_MBY) is automatically created.
- The name of the ROLE_MBY group is taken from the ORG group or UDC for which this group was created.
- All ROLE_MBY names start with the ROLE_MBY prefix

FSAM TRAINING

FSAM Hierarchy

The FSAM group types and where they fit into the hierarchy levels is shown below.

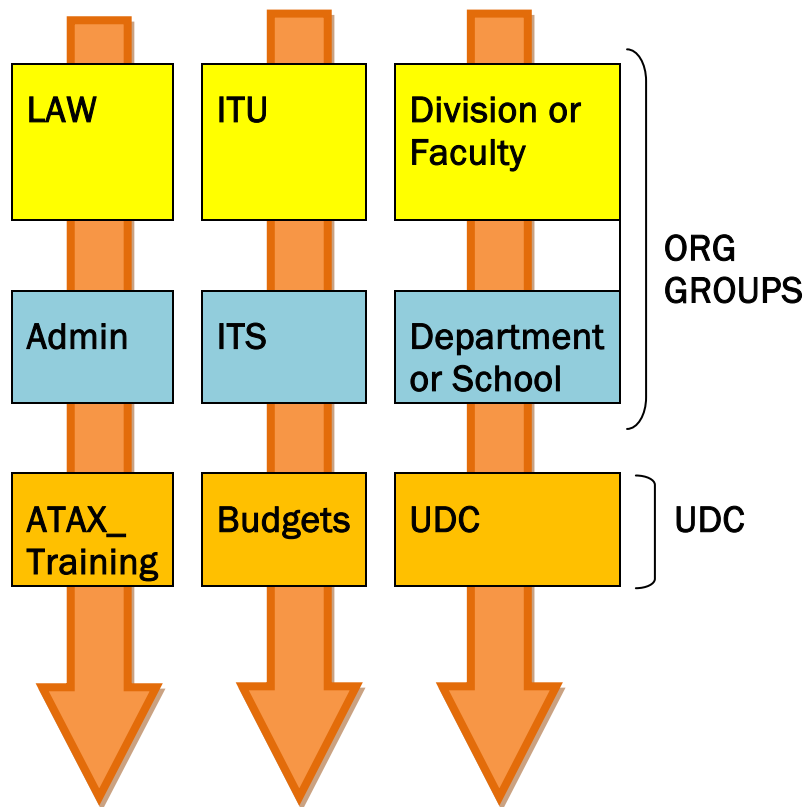


Figure 2 – FSAM Group Concepts

GROUP HIERARCHY AND NAMING CONVENTION

Topic Overview



This topic introduces the group hierarchy and naming conventions used in FSAM and shows examples of group names for the three FSAM group types.

ORG Group Overview

Org groups reflect the organisational structure of the university's organisations and often conform to the following hierarchy:

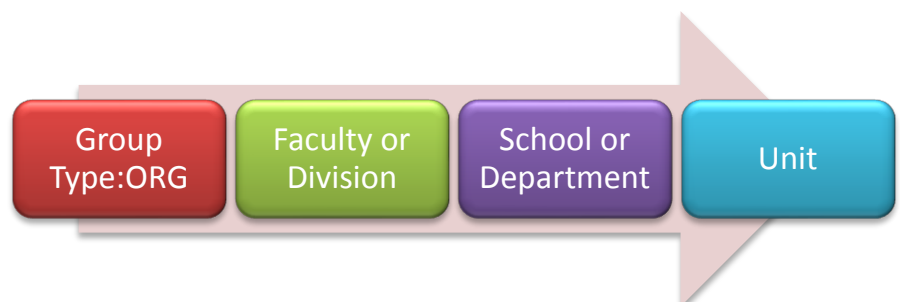


Figure 3 – ORG group hierarchy showing Faculty or Division, School or Department and Unit

FSAM TRAINING

ORG Group Example 1

An example of an ORG group for Administration staff in the School for Language and Linguistics (SLL), which is part of the Faculty of Arts and Social Sciences (FASS) is shown below.

This Org group name will display in FSAM as:

ORG_FAS_SLL_ADM



Figure 4 - ORG group for the FASS, SLL School, Administration group

ORG Group Example 2

An example of an ORG group for Procurement Staff in the IT Customer Services Department (ITCS) which is part of the IT division is shown below.

This Org group name will display in FSAM as:

ORG_ITU_ITCS_Procurement

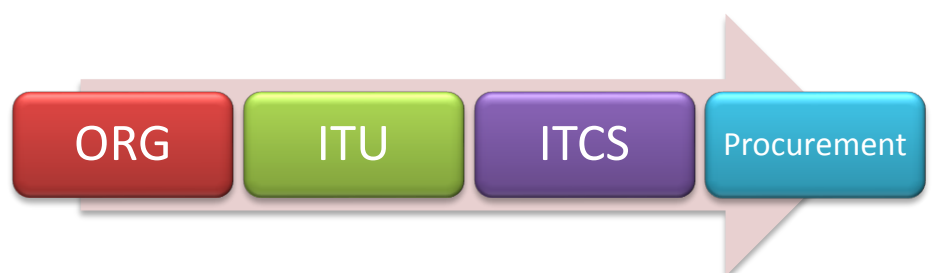


Figure 5 - ORG group for the ITU division, IT Customer Service department (ITCS), Procurement group

FSAM TRAINING

Group Hierarchy and Naming Convention

UDC Overview

A UDC is a collection of people created by a user that reflects a group of people with a common role, interest, task or project. It is created to give a group of people access to a secure shared file space and resources and / or an e-mail distribution list.

UDC's often conform to the following hierarchy:

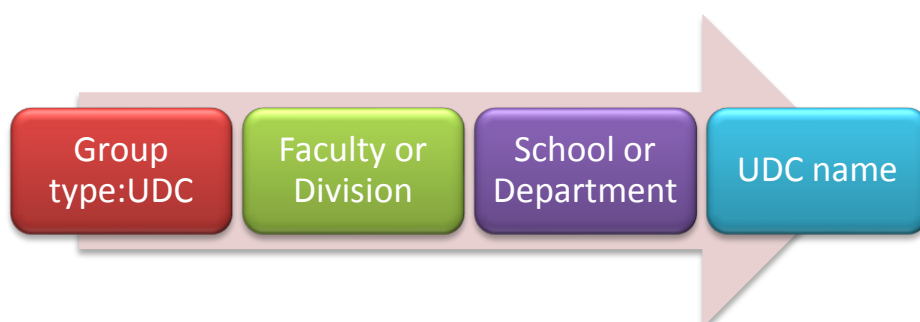


Figure 6 – UDC hierarchy showing Faculty or Division, School or Department and UDC

UDC Example 1

Below is an example of a UDC that has been created for the A_ATAX training project or team. It is attached to the Admin unit that is part of the Law faculty.

This UDC will display in FSAM as:

UDC_LAW_Admin_ATAX Training



Figure 7 – UDC named A_TAX Training which is attached to the Admin unit that is a part of the LAW Faculty.

Group Hierarchy and Naming Convention

UDC Example 2

Below is an example of an UDC that has been created for the Budgets team. It is attached to the IT Enterprise Systems department (ITES) that is part of the ITU division.

This UDC will display in FSAM as:

UDC_ITU_ITES_Budgets

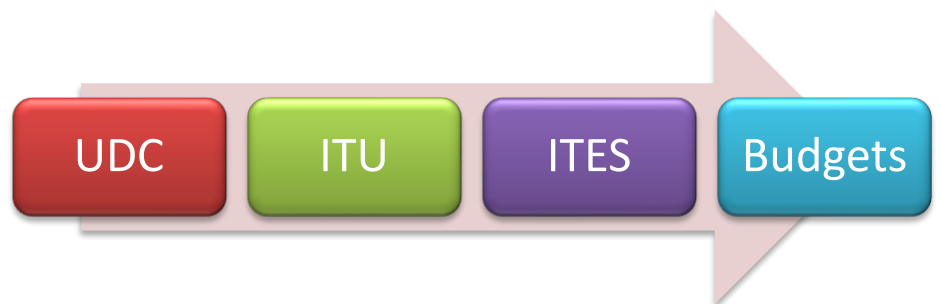


Figure 8 – UDC named Budgets which is attached to the ITES department that is a part of the ITU division.

Note: A UDC may belong to a sub group of a school or department.

Group Hierarchy and Naming Convention

ROLE_MBY Overview

ROLE_MBY are groups of users that are created solely for the management of one or more Organisational groups or User Defined Cohorts.

The name of the ROLE_MBY group is taken from the ORG group or UDC for which this group was created

A ROLE_MBY will often conform to the following hierarchy:



Figure 9 – ROLE_MBY group hierarchy showing Faculty or Division and Group name

ROLE_MBY Example 1

An example of a ROLE_MBY group named ALLSTAFF which is attached to the Faculty of Law is shown below.

This ROLE_MBY group name will display in FSAM as:

ROLE_MBY_LAW_ALLSTAFF



Figure 10 – ROLE_MBY named ALLSTAFF which is attached to the Faculty of Law group

Group Hierarchy and Naming Convention

ROLE_MBY Example 2

An example of a ROLE_MBY group named HR which is attached to the Admin department that is part of the Faculty of Law group is shown below.

Note: In this example the ROLE_MBY is attached to the HR sub group which belongs to the LAW group.

This ROLE_MBY group name will display in FSAM as:

ROLE_MBY_LAW_Admin_HR



Figure 11 – ROLE_MBY named HR which is attached to the Admin department that is a part of the faculty of Law.

Topic Overview



This topic introduces the FSAM Workbench. By accessing and using the FSAM Workbench a user may view and search for groups, and search for all groups which contain a specified zPass or member.

ACCESSING FSAM WORKBENCH

The UNSW FSAM (File System Access Management) Workbench displays the “**Workbench**” and “**Create UDC**” quick links at the screens left. These allow easy access to the “**Workbench**” and “**Create UDC**” actions.

The “**Actions**” and “**Search**” features are at located at the screen’s right. You can use the Search feature to find groups by Faculty or Organisation (ORG) and / or by Group Type.

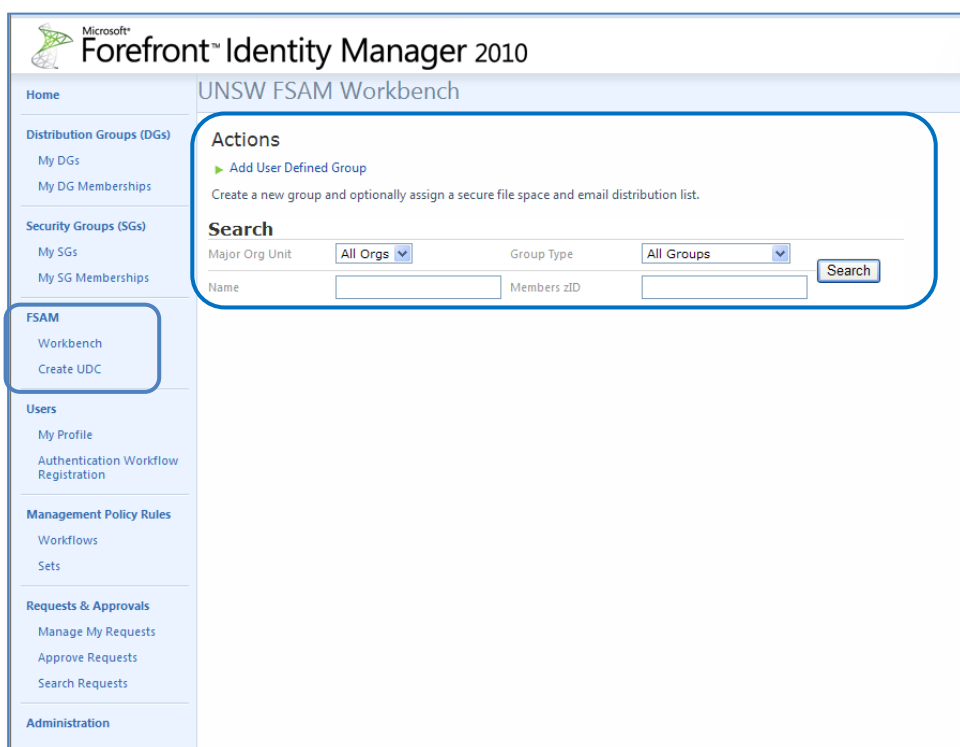


Figure 12 – The FSAM screen displaying the Workbench and quick links

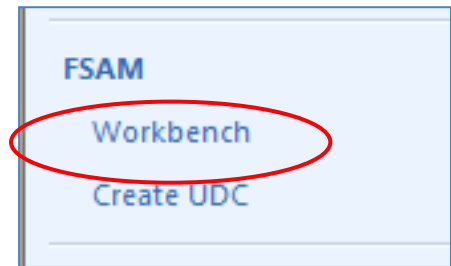


Figure 13 – The FSAM Workbench quick link

VIEWING GROUPS

- You can view all groups or selected groups within a particular Faculty or Business Division by searching by the Major Organisation group option.
- You can also view all Group Types or selected Group Type by selecting the Group Type option.
- When you view a list of groups the Group Name, Display Name, Description and File Resources of the group are displayed.
- Clicking a group name from the list of results displays a Basic Details form for the group, and then displays option to modify the group.

SEARCHING

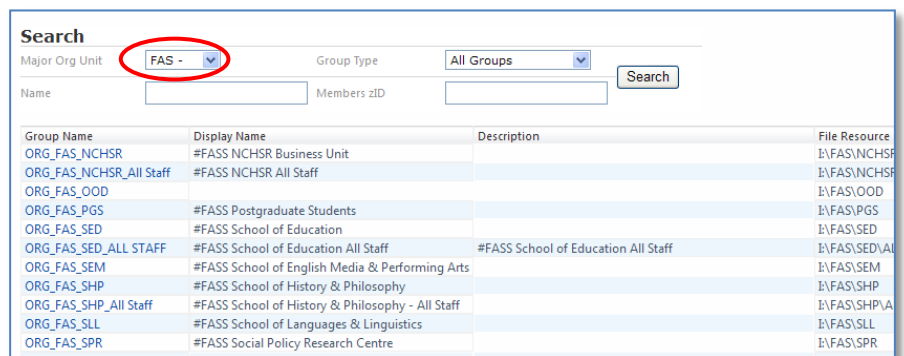
Searching for ORG Units & Groups

How Do I Search?

For example, you may wish to display all groups belonging to FASS or you may wish to display a list of only FASS UDC's.

To Search for Major Org Units and / or Group Types:

- Click the downward arrow on **Major Org Unit** and select the required ORG Unit and / or
- Click the downward arrow on **Group Type** and select the required Group Type
- Click the **Search** button



The screenshot shows a search interface with the following elements:

- Search** header
- Major Org Unit** dropdown menu with "FAS -" selected and a downward arrow.
- Group Type** dropdown menu with "All Groups" selected and a downward arrow.
- Name** and **Members zID** input fields.
- Search** button.
- A table of results with columns: Group Name, Display Name, Description, and File Resource.

Group Name	Display Name	Description	File Resource
ORG_FAS_NCHSR	#FASS NCHSR Business Unit		I:\FAS\NCHSR
ORG_FAS_NCHSR_All Staff	#FASS NCHSR All Staff		I:\FAS\NCHSR
ORG_FAS_OOD			I:\FAS\OOD
ORG_FAS_PGS	#FASS Postgraduate Students		I:\FAS\PGS
ORG_FAS_SED	#FASS School of Education		I:\FAS\SED
ORG_FAS_SED_All STAFF	#FASS School of Education All Staff	#FASS School of Education All Staff	I:\FAS\SED\All
ORG_FAS_SEM	#FASS School of English Media & Performing Arts		I:\FAS\SEM
ORG_FAS_SHP	#FASS School of History & Philosophy		I:\FAS\SHP
ORG_FAS_SHP_All Staff	#FASS School of History & Philosophy - All Staff		I:\FAS\SHP\All
ORG_FAS_SLL	#FASS School of Languages & Linguistics		I:\FAS\SLL
ORG_FAS_SPR	#FASS Social Policy Research Centre		I:\FAS\SPR

Figure 14 –Search for Major Org Units or Group Types

The Major Org Unit and Group Type matching the Search results will display as a list below the Search options.

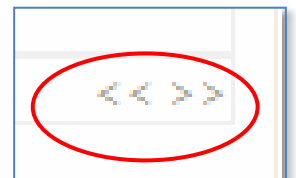


Figure 15 – The Previous Page and Next Page buttons



Tip: You may have more than one page of Search results. To navigate to another page, **click the double headed arrows** at the right corner of the Search screen results.

Tip: You can also search for a group by entering the first characters of the group's name into the Name box. (A minimum of the first three characters is essential).

Search

Major Org Unit: Group Type:

Name: Members zID:

Group Name	Display Name	Description
UDC_FAS_EMPA_ADMIN	#FASS EMPA Admin	#FASS EMPA Admin
UDC_FAS_EMPA_CPRU	#FASS EMPS CPRU	#FASS EMPS CPRU
UDC_FAS_EMPA_HOS	#FASS EMPA Head of School	#FASS EMPA Head of School
UDC_FAS_EMPA_MANAGER	#FASS EMPA Manager	#FASS EMPA Manager

Figure 16 – Search for Group by Partial Group Name

Searching for Groups by User

To Search by a Users zID:

You can search for all groups which have a particular person as a member. To do this:

- Type the person's **zID** in the **Members zID** box
- Click the **Search** button

The list of matching results will display below your search button.

Create a new group and optionally assign a secure file space and email distribution list.

Search

Major Org Unit: Group Type:

Name: Members zID:

Figure 17 –Searching by a zID

- The result is a list of groups of which include this zID as a member.

Search

Major Org Unit: Group Type:

Name: Members zID:

Group Name	Display Name	Description	File Resource
ORG_ITU_ITT_CI	#ITU IT Transition Consolidated Infrastructure	#ITU IT Transition Consolidated Infrastructure	\\ITU\ITT\CI

Figure 18 - Searching by a zID results



Tip: You can instead type the person's name into the Member ID box and search. If the name is unique, the person will be found and their name listed as a member to add.

If the name is not unique, a search results box displays listing all matching results. Tick to select the required person to add.

The search finds on first and last names in addition to partial names and is not case sensitive.

Review



Check your knowledge by marking the correct answers.

Q 1 The three FSAM group types are:

ORG

Unit

UDC

ROLE_MBY

Authority

Access

Q2 The prefix in a group's name defines the group type.

True / False

Module 2

Aims

The aim of module 2 is to learn how to create a request to add a person to a group; create a request to remove a person from a group and to learn how to manage your requests and approvals.

Topics

In this module you will learn how to:

- 👉 Create a Request to Add a Person to a Group
- 👉 Create a Request to Remove a Person from a Group
- 👉 Manage Your Requests and Approvals

Topic Overview



Add a Person to a Group

This topic introduces the FSAM steps that allow a user to search for and add a member to a group and remove a member from a group. Adding a member or removing a member from a group automatically instigates an action.

How can I add a Person to a Group?

To add a person to a group you **search for the required group** then **add the person to the group**. This automatically generates an e-mail request to the group's owners. A member of the owning group will then approve or decline your request.

When a person is added to a group they have access to the group's file resources and they become a part of the group's distribution list.

When you add a person to a group you are issuing a request to the group's owners to allow this person to join the group. A member of the owning group can then approve or decline your request.

FSAM TRAINING

Search for Group

To search for the group:

- Search for a **Major Org Unit** and / or **Group Type** to join by clicking the **downward arrow** next to these choices

The result is a list of groups matching your selection or selections.

- Click the **name** of the **required group** in the list
- Click **Next**

UNSW FSAM Workbench

Actions

► Add User Defined Group

Create a new group and optionally assign a secure file space and email distribution list.

Search

Major Org Unit: LIB - #LIB All Staff Group Type: User Defined Search

Name: Members zID:

Group Name	Display Name	Description	File Resource
UDC_LIB_CSD Management	#LIB Central Services Department Management	#LIB Central Services Department Management	
UDC_LIB_DLSD Management	#LIB Digital Library Services Department Management	#LIB Digital Library Services Department Management	
UDC_LIB_DLSD_ResPubs coordination Group	#LIB ResPubs Coordination Group	#LIB ResPubs Coordination Group	
UDC_LIB_ISD Management	#LIB Information Services Department Management	#LIB Information Services Department Management	
UDC_LIB_Management	#LIB Management	#LIB Management	

Figure 19– Searching for Major Org Unit or Group Type

A Basic Details form displays listing the group's name, type, purpose, description and options

- Click **Next**

FSAM TRAINING

Add Member to Group

The Add / Remove Members form displays.

Add/Remove Members

Current Members

ZID	Name
z8520429	Cassandra Grant

Members to Add

ZID	Name	Job Title
Add new members to this group.		
<input type="text" value="Z3380266"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Add"/>		<input type="button" value="Search"/>

Members to Remove

ZID	Name	Job Title
Remove members from this group.		
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Remove"/>		

Figure 20 - Searching for Member to Add

To Add Member to the group:

- Type the zID into the **Members to Add** box
- Click **Add**
- Click **Next**

WHAT HAPPENS NEXT?

What Happens After I Create a Request to Add a Person to a Group?

An e-mail message is automatically created and sent to the group's owners advising of your request. An owner of the group can approve, reject or not respond to your request.

Requests that are not responded to within two weeks are automatically deleted. The requestor is advised that the request has been rejected due to a lack of authorisation occurring within the two weeks period.

REMOVE A PERSON FROM A GROUP

Important Note:

Requests that are generated by a **group's manager**, (i.e. a member of the group designated as the group's owner), an **administrator** or a **local group administrator** are **automatically approved**; e-mail messages are not generated in these cases.

What Happens When I Remove a Person from a Group?

Removing a person from a group means that person will **no longer have access to the group's secure shared file locations and resources**, nor will they be part of the group's e-mail distribution list if these features were previously available to them as a group member.

How Do I Remove a Person from an Existing Group?

To remove a person from a group you search for the required group then click the required group's name. You then nominate the Member of the group you wish to remove. This generates an e-mail request to the group's owners. A member of the owning group will then approve or decline your request.

FSAM TRAINING

Search for the Group

To search for the group:

- Search for a **Major Org Unit** and / or **Group Type** to join by clicking the **downward arrow** next to these choices

The result is a list of groups matching your selection or selections.

- Click the **name** of the **required group** in the list
- Click **Next**
- Click the **required group**

A Basic Details form displays.

- Click **Next**

The View/Modify Group form displays the current group members.

Nominate Member to Remove

- Type the **members zID or name** into the **Members to Remove box**

Remove Member

Members to Add

ZID	Name	Job Title
z3380237	Denise Tsagaris	Internal Co

Members to Remove

ZID	Name	Job Title
Remove members from this group.		
Z3380266		

Figure 21 – Add/Remove Members form

FSAM TRAINING



- Click **Remove**
- Click **Next**, click **Next** , click **Next**
- Click **Complete**

Tip: You can type the member's name into the "Members to Remove" box instead of typing the zID. If the member's name is a unique entry in the group members list, the members will be removed from the group.

Tip: You cannot reduce the group's membership to zero.

What Happens Next?



An e-mail message is automatically created and sent to the group's owners advising of your request. An owner of the group can approve, reject or not respond to your request.

Requests that that are not responded to are automatically deleted. The requestor is advised that the request has been rejected due to a lack of authorisation occurring within the two weeks period.

Important Note:

Requests that are generated by a **group's manager**, (i.e. a member of the group designated as the group's owner), an **administrator** or a **local group administrator** are **automatically approved**; e-mail messages are not generated in these cases.

FSAM TRAINING

MANAGE MY REQUESTS

Topic Overview



This topic introduces managing your requests. You will learn how to list your requests, search for requests by timeframe or status, and sort and cancel requests.

How Do I Track Requests and Approvals?

When you add a person to a group, remove a person from a group, or create a UDC you are creating a request.

Requests that are issued by you may be viewed, filtered by date, sorted, or cancelled.

To Manage Your Requests:

- Click the **Manage My Requests** link
(Under Requests & Approvals)

A list of requests is displayed in date order, the most recent request displays first.



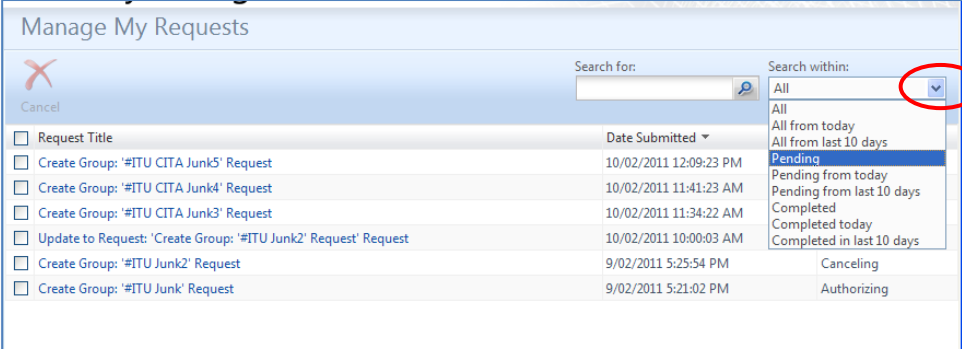
Figure 22 – Manage My Requests link

FSAM TRAINING

Search for Request

You can **filter** your requests by **Timeframe** or **Status**. To do this:

- Click the downward arrow under **Search Within:**
- Click the required **time frame** or **status** such as pending from the list
- Click the **Search** button



Manage My Requests

Search for:

Search within: ▼

☐ Request Title

☐ Create Group: '#ITU CITA Junk5' Request

☐ Create Group: '#ITU CITA Junk4' Request

☐ Create Group: '#ITU CITA Junk3' Request

☐ Update to Request: 'Create Group: '#ITU Junk2' Request' Request

☐ Create Group: '#ITU Junk2' Request

☐ Create Group: '#ITU Junk' Request

Date Submitted ▼

10/02/2011 12:09:23 PM

10/02/2011 11:41:23 AM

10/02/2011 11:34:22 AM

10/02/2011 10:00:03 AM

9/02/2011 5:25:54 PM

9/02/2011 5:21:02 PM

Canceling

Authorizing

Figure 23 – Manage My Requests form



Figure 24 – Search button

Sort requests

Your requests can be sorted by Date submitted or Status. To do this, click the Date submitted column heading or the Status column heading. Clicking the Date submitted column heading or the Status column heading again will reverse the sort order in the displayed list.

Cancel a Request

You may cancel a request if it has not already been approved. Cancelling a request will send an e-mail to all of the managing group's owners advising no further action is required

To Cancel a Request:

- Click the **Manage My Requests** link (under Requests & Approvals)
- Select the required request to delete by clicking the **box** at the left of the request until it is **ticked**.

(To select all requests, click the Request Title box until ticked)

- Click **Cancel**
- Click **Submit**
- Click **OK**

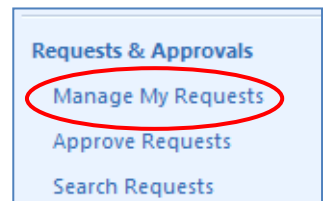


Figure 25 – Manage My Requests link

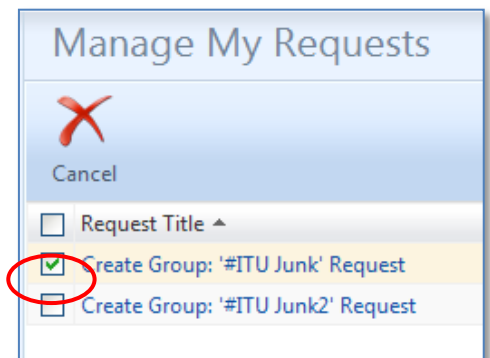


Figure 26 Manage My Requests

Review



Check your knowledge by marking the correct answers.

Q1 When you add a person to a group you are creating a request :

True / False

Q2 Any user may issue a request to modify a group.

True / False

Q3 Any modifications made to a group are automatically granted if the request is made by those with Administrator or Local Administrator rights or if the request is made by a member of the managing group.

True / False

Q4 You cannot cancel a request

True / False

Module 3

Aims

The aim of module 3 is to learn how to create a UDC, add users and remove users from the UDC and allocate permissions to folders and files for the group.

Topics

In this module you will learn how to:

- 👉 Create a UDC
- 👉 Add a User to a UDC
- 👉 Remove a User from a UDC
- 👉 Modify a UDC

Topic Overview



WHAT IS A USER DEFINED COHORT?



Advantages of a UDC

This topic introduces the concept of a User Defined Cohort (UDC), explains its purpose and functionality.

What is a User Defined Cohort (UDC) ?

A UDC is a collection of people created by a user. The members of a UDC share a common role, interest, task or project. The UDC can have rights to a shared file space and access to an e-mail distribution list for the group.

What are the Advantages of Creating a UDC ?

A user may create new groups specifically for projects, research teams or specialised groups of users with rights to a shared file space and access to an e-mail distribution list without logging a request to Help Desk.

When you create a UDC, you may:

- ✓ Obtain a secure shared file space
- ✓ Obtain access as a group to other secure file spaces
- ✓ Create an e-mail distribution list

All of the above actions may be done without involving Help Desk. In addition, you have the option to nominate an ORG group, or an existing ROLE_MBY (Manage By) or nominate two to three members of the UDC to manage the group.

Requests that are generated by the **group's manager**,¹ an **administrator** or a **local group administrator** are **automatically approved**.

¹ The managing ORG group, or ROLE_MBY or one of the members nominated as the group's manager.

How It Works

Members of a UDC share a common role, interest, task or project. When you create a UDC you are placing or attaching the UDC to an existing Organisation Unit. The UDC or Organisation Unit's managers receive your request to create a UDC. They can approve or decline your request.

The creation of a UDC must be approved by the owners of the group under which it is created. When creating a UDC it is important to locate it under the relevant ORG (faculty or division).

A UDC may be allocated a secure shared file space and / or an e-mail distribution list.

Create a UDC

How Do I Create a UDC ?

To create a UDC, from the left of the screen:

- Click the **Workbench** link
- Type the **Group's Name**

This should reflect the purpose of the group, project or the department.

- Type the **Group's Description or Purpose**
- Select a **Major Org Unit or UDC**
- Select a **Location**

Your group will be attached to this Major Org unit or UDC upon approval.



Tip: It is important that you select the correct Major Org Unit and location as your request to create a new UDC in this location requires approval from the an owner of the ORG Unit location you have selected.

Group Options

You have the option to create a secure shared file location by checking the box marked File Directory Space. You also have the option to create an Email Distribution List by checking the box marked Email Distribution List

- Click **Next**

Create User Defined Cohort

Basic Details

Group Name: Junk

Description / Purpose of Group: Training Feb 9, 2011

Major Org Unit: ITU - IT at UNSW

Location: ORG_ITU

Options: ☒ File Directory Space, ☒ Email Distribution List

Figure 27 – Create a User Defined Cohort - Basic Details form.

Add Member to UDC

- Add a Member to the **group** by typing their **zID** into the **Members to Add box**
- Click the **Add** button

Members to Add

ZID	Name	Job Title
<i>Add new members to this group.</i>		

z3380237 | Add | Search

- Figure 28 – Adding a member by zID



Tip: You may also add a member to the group using their name. To do this type their name or part of their name into the **Member to Add** box. (The name should have a minimum of 3 characters). If the name is unique the full name will appear. If the name is not unique a list of matching entries will appear. In this case click the box next to the required name until it is ticked then click OK.

Managing the UDC

Decide Who Will Manage the UDC

The UDC may be managed by:

- The lowest level **ORG** group or
- an existing **ROLE_MBY** group or
- by **two to three members** of the UDC

Selecting members of the UDC to be managers of the group creates a **ROLE_MBY** group. The sole purpose of the **ROLE_MBY** group is to manage the group it owns. An existing **ROLE_MBY** group may be nominated as a manager for any UDC.

Important note:

Only **ORG** groups that have users as members may be assigned as a managed by group.

Members as UDC Manager

Members who are the group's managers may approve memberships and make other changes to the group. If you elect to have the group managed by existing members of the group:

- Click **“select from the member list”**
- Type the **member's zID** or their name into the **Add Member box**
- Click **Add**
- Click **Next**
- Click **Complete**

You must have a **minimum** of **2** members and a **maximum** of **3** members as group managers.

Managed By Details

Specify which users from the list of members will manage the group

How would you like to add the manager?

- ☒ select from the member list
- ☐ select from managed by group



Figure 29 – Selecting members to manage the group.

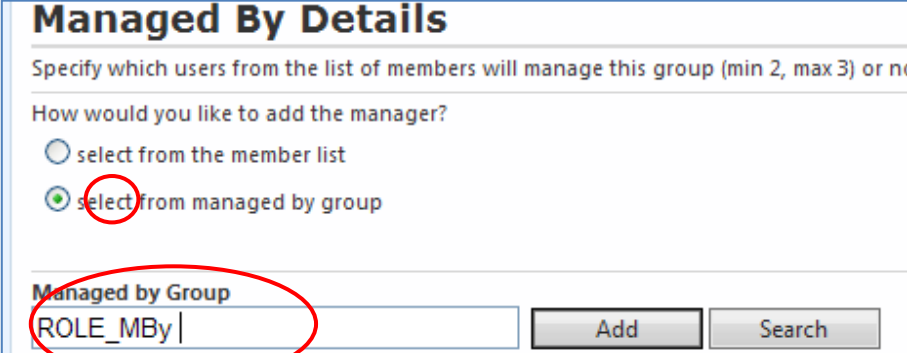
Tip: You may type part of a name into the Add Member box. If the name is unique the full name will appear. If the name is not unique a list of matching entries will appear.

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ORG group as UDC Manager

If you elect to have the UDC managed by another group, for example an ORG group, a ROLE_MBY or UDC that already exists:

- Click **select from managed by group** until it is selected
- Type the group type into the Managed by Group box i.e. ORG or ROLE or UDC
- Click **Search**

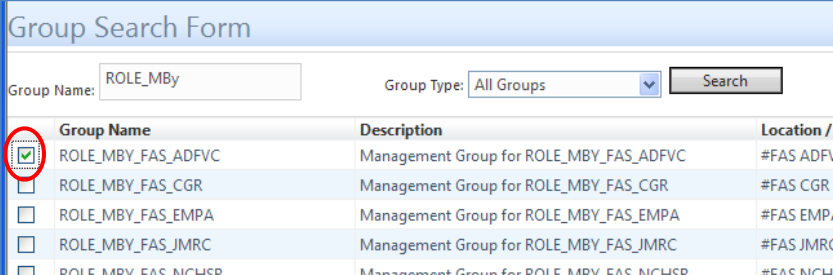


The screenshot shows the 'Managed By Details' form. It has a title bar 'Managed By Details' and a subtitle 'Specify which users from the list of members will manage this group (min 2, max 3) or no'. Below this is a question 'How would you like to add the manager?' with two radio button options: 'select from the member list' and 'select from managed by group'. The second option is selected and circled in red. Below the radio buttons is a text box labeled 'Managed by Group' containing the text 'ROLE_MBy|', which is also circled in red. To the right of the text box are two buttons: 'Add' and 'Search'.

Figure 30 – Managed by Details form

- **Select** the **required group** by **clicking** the **box** to the left of the group name until ticked.
- Click **OK**
- Click **Next**
- Click **Complete**

A Review screen displays summarising the group's details, members and managers.



The screenshot shows the 'Group Search Form'. It has a title bar 'Group Search Form'. Below the title bar are two input fields: 'Group Name:' with the text 'ROLE_MBy' and 'Group Type:' with a dropdown menu showing 'All Groups'. To the right of these fields is a 'Search' button. Below the input fields is a table with three columns: 'Group Name', 'Description', and 'Location /'. The table contains five rows of data. The first row is highlighted with a green checkmark in the first column, which is also circled in red. The other four rows have unchecked checkboxes in the first column.

Group Name	Description	Location /
<input checked="" type="checkbox"/> ROLE_MBY_FAS_ADFVC	Management Group for ROLE_MBY_FAS_ADFVC	#FAS ADFVC
<input type="checkbox"/> ROLE_MBY_FAS_CGR	Management Group for ROLE_MBY_FAS_CGR	#FAS CGR
<input type="checkbox"/> ROLE_MBY_FAS_EMPA	Management Group for ROLE_MBY_FAS_EMPA	#FAS EMPA
<input type="checkbox"/> ROLE_MBY_FAS_JMRC	Management Group for ROLE_MBY_FAS_JMRC	#FAS JMRC
<input type="checkbox"/> ROLE_MBY_FAS_NCHSR	Management Group for ROLE_MBY_FAS_NCHSR	#FAS NCHSR

Figure 31 – Group Search Form

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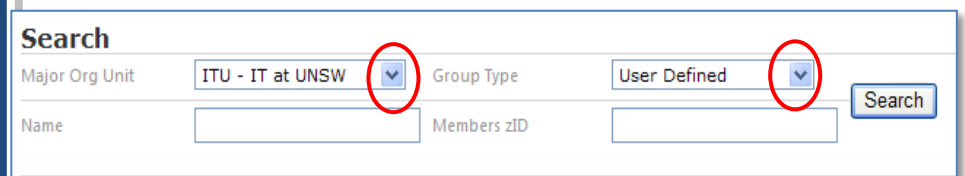
MODIFY A USER DEFINED COHORT

To View or Modify a Group

To add or remove members, to add or remove options for a File Directory Space and / or e-mail Distribution List, or change the group's Access Rights:

Step 1 – Search for the Group

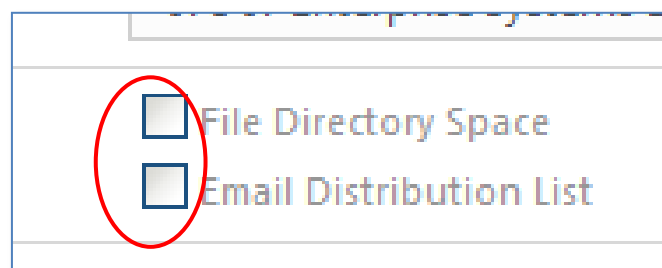
- Search for the required **Major Org Unit** and / or **Group type** by using the **downward arrows**
- Click **Search**
- Click the required group name



The screenshot shows a 'Search' form with the following fields: 'Major Org Unit' with a dropdown menu showing 'ITU - IT at UNSW' and a downward arrow circled in red; 'Group Type' with a dropdown menu showing 'User Defined' and a downward arrow circled in red; 'Name' with an empty text box; and 'Members zID' with an empty text box. A 'Search' button is located to the right of the 'Members zID' field.

Figure 32 – Major Org Unit and Group Type List arrows

- Change the options for Secure File Space, e-Mail distribution list if desired
- Click **Next**



The screenshot shows a section with two options, each with a checkbox and a label: 'File Directory Space' and 'Email Distribution List'. Both checkboxes are circled in red.

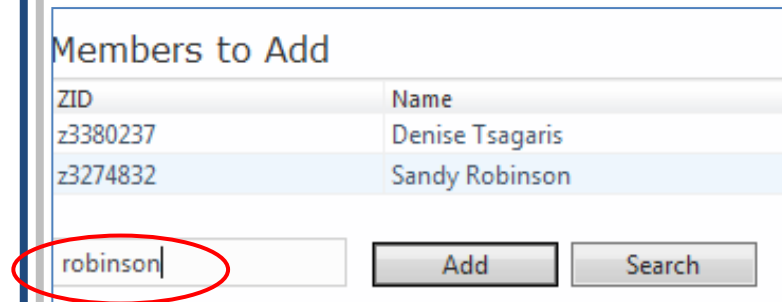
Figure 33 –File Directory Space and e-Mail Distribution List options

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Add a Person to the Group

Step 2 - Add a Person to the Group

- Type the person's zID or type their name
- Click **Add** to add the person to the group



ZID	Name
z3380237	Denise Tsagaris
z3274832	Sandy Robinson

robinson Add Search

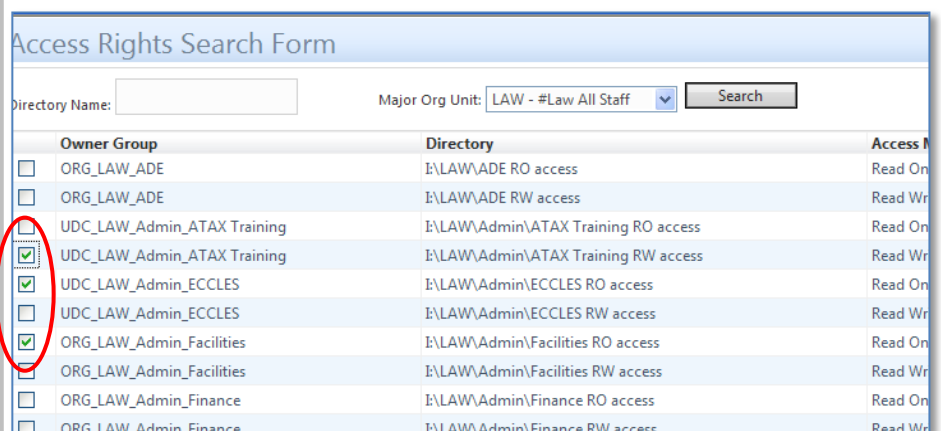
Figure 34 – Members to Add

Access Rights



Step 3 - Add Access Rights

- Click **Add Rights**
- Select the required group or groups by clicking the box until ticked
- Click **Search**
- Click **OK**
- Click **Next**
- Click **Complete**



Owner Group	Directory	Access
<input type="checkbox"/> ORG_LAW_ADE	I:\LAW\ADE RO access	Read On
<input type="checkbox"/> ORG_LAW_ADE	I:\LAW\ADE RW access	Read Wr
<input type="checkbox"/> UDC_LAW_Admin_ATA Training	I:\LAW\Admin\ATA Training RO access	Read On
<input checked="" type="checkbox"/> UDC_LAW_Admin_ATA Training	I:\LAW\Admin\ATA Training RW access	Read Wr
<input checked="" type="checkbox"/> UDC_LAW_Admin_ECCLES	I:\LAW\Admin\ECCLES RO access	Read On
<input type="checkbox"/> UDC_LAW_Admin_ECCLES	I:\LAW\Admin\ECCLES RW access	Read Wr
<input type="checkbox"/> ORG_LAW_Admin_Facilities	I:\LAW\Admin\Facilities RO access	Read On
<input type="checkbox"/> ORG_LAW_Admin_Facilities	I:\LAW\Admin\Facilities RW access	Read Wr
<input type="checkbox"/> ORG_LAW_Admin_Finance	I:\LAW\Admin\Finance RO access	Read On
<input type="checkbox"/> ORG_LAW_Admin_Finance	I:\LAW\Admin\Finance RW access	Read Wr

Figure 35 – Members to Add

Remove a Member from a Group

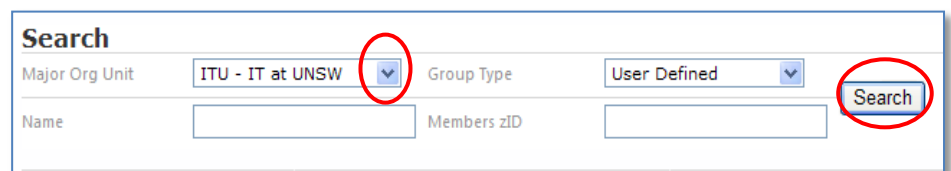
What Happens When I Remove a Member from a Group?

- ▶ Removing a member from a group means that user will **no longer have access to the group's secure file location and resources** nor will they be part of the group's e-mail distribution list if these features were previously available to them as a group member.
- ▶ To remove a member from a group, search for the required group, then select the required group, and then remove the member from the group.
- ▶ Members may be removed from ORG, ROLE_MBY and UDC groups.
- ▶ It is important to note that ROLE_MBY groups must have a minimum of two and a maximum of three members.
- ▶ A request is automatically generated to the group's owners requesting your action be approved.

Search for Group

To remove a member from a group, from the Workbench:

- Search for the required **Major Org Unit** and / or **Group type** by using the **downward arrows**
- Click **Search**
- Click the required group name

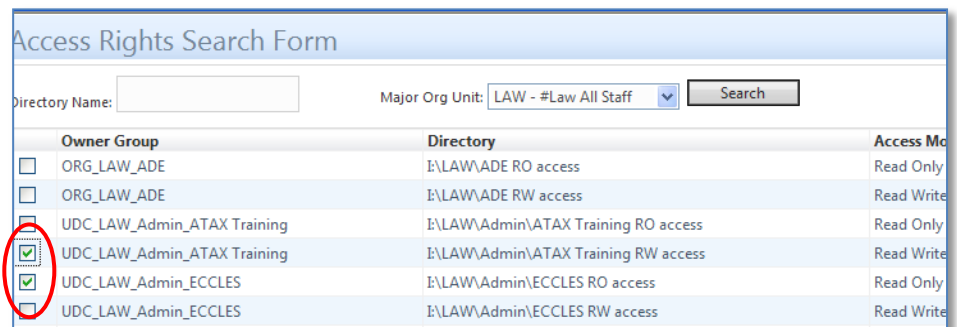


Search

Major Org Unit: ITU - IT at UNSW ▼ Group Type: User Defined ▼

Name: Members zID: Search

Figure 36 – Major Org Unit and Group Type List arrows



Access Rights Search Form

Directory Name: Major Org Unit: LAW - #Law All Staff Search

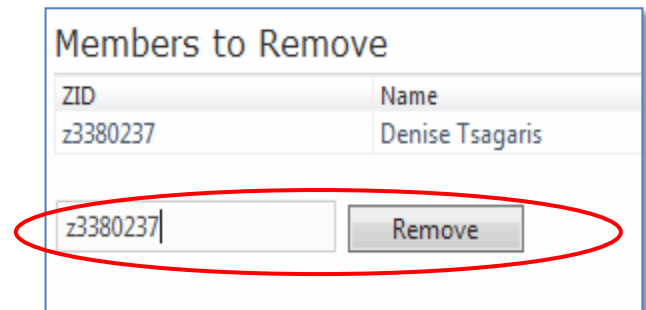
Owner Group	Directory	Access Mo
<input type="checkbox"/> ORG_LAW_ADE	E:\LAW\ADE RO access	Read Only
<input type="checkbox"/> ORG_LAW_ADE	E:\LAW\ADE RW access	Read Write
<input type="checkbox"/> UDC_LAW_Admin_ATAX Training	E:\LAW\Admin\ATAX Training RO access	Read Only
<input checked="" type="checkbox"/> UDC_LAW_Admin_ATAX Training	E:\LAW\Admin\ATAX Training RW access	Read Write
<input checked="" type="checkbox"/> UDC_LAW_Admin_ECCLES	E:\LAW\Admin\ECCLES RO access	Read Only
<input type="checkbox"/> UDC_LAW_Admin_ECCLES	E:\LAW\Admin\ECCLES RW access	Read Write

Figure 37 – Major Org Unit and Group Type List arrows

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Nominate Member to Remove

- Type the persons zID into the **Remove** box
- Click **Remove**
- Click **Next**
- Click **Next**
- Click **Complete**



ZID	Name
z3380237	Denise Tsagaris

z3380237 Remove

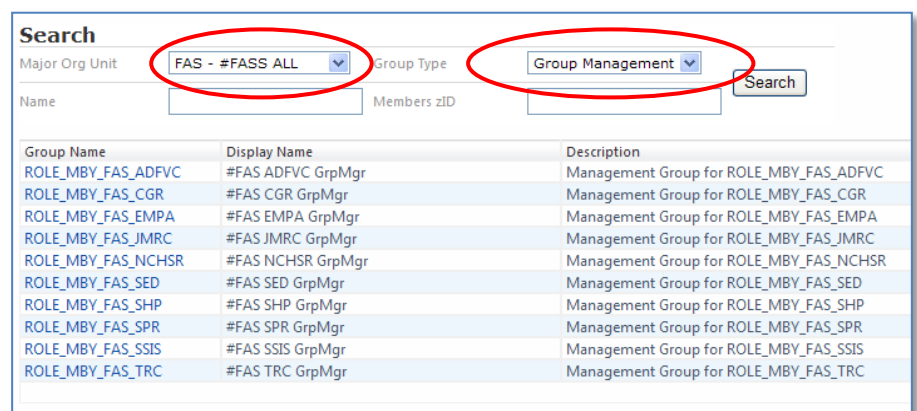
Figure 38 – Members to Remove

GROUP MANAGEMENT

You may wish to list all Managing groups for a particular ORG unit such as FASS or LAW. To do this;

From the Workbench:

- Select the **Major Org Unit**
- Change the **Group Type** to **Group Management**
- Click **Search**



Search

Major Org Unit: FAS - #FASS ALL Group Type: Group Management Search

Name: Members zID:

Group Name	Display Name	Description
ROLE_MBY_FAS_ADFVC	#FAS ADFVC GrpMgr	Management Group for ROLE_MBY_FAS_ADFVC
ROLE_MBY_FAS_CGR	#FAS CGR GrpMgr	Management Group for ROLE_MBY_FAS_CGR
ROLE_MBY_FAS_EMPA	#FAS EMPA GrpMgr	Management Group for ROLE_MBY_FAS_EMPA
ROLE_MBY_FAS_JMRC	#FAS JMRC GrpMgr	Management Group for ROLE_MBY_FAS_JMRC
ROLE_MBY_FAS_NCHSR	#FAS NCHSR GrpMgr	Management Group for ROLE_MBY_FAS_NCHSR
ROLE_MBY_FAS_SED	#FAS SED GrpMgr	Management Group for ROLE_MBY_FAS_SED
ROLE_MBY_FAS_SHP	#FAS SHP GrpMgr	Management Group for ROLE_MBY_FAS_SHP
ROLE_MBY_FAS_SPR	#FAS SPR GrpMgr	Management Group for ROLE_MBY_FAS_SPR
ROLE_MBY_FAS_SSI	#FAS SSI GrpMgr	Management Group for ROLE_MBY_FAS_SSI
ROLE_MBY_FAS_TRC	#FAS TRC GrpMgr	Management Group for ROLE_MBY_FAS_TRC

Figure 39 – Members to Remove

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Modify a Managed By Group (ROLE_MBY)



To modify Manage By Groups (ROLE_MBY), you must first find the group, then modify it.

To do this:

From the Workbench:

- Click the required **Group** Name
- Change the Group description or purpose
- Click **Next**

To Add a Member to the Group

- **Type** the person's **zID**
- Click **Add**

To Remove a Member from the Group

- **Type** the persons **zID**
- Click **Remove**
- Click **Next**
- Click **Complete**

FSAM TRAINING

ACCESS RIGHTS SEARCH

Topic Overview



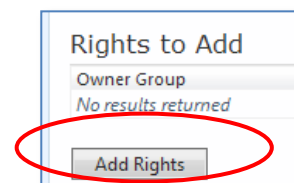
This topic introduces searching for and adding access rights to files resources for a group.

You may search for available file access privileges that can be added to or removed from a group's access rights.

To **Add Access Rights**, from the Workbench:

- Search for the Major ORG unit and the Group Type
- Select the group you wish to modify
- Click Next, Next, Next
- Click **Add Rights**
- Select the required Major Org Unit or type the directory you wish to add to the group's access rights by clicking the box until it is ticked. More than one group may be selected.

Figure 40 – Add Access Rights



Owner Group	Directory	Access
<input type="checkbox"/> ORG_LAW_ADE	I:\LAW\ADE RO access	Read On
<input type="checkbox"/> ORG_LAW_ADE	I:\LAW\ADE RW access	Read Wr
<input type="checkbox"/> UDC_LAW_Admin_ATA Training	I:\LAW\Admin\ATA Training RO access	Read On
<input checked="" type="checkbox"/> UDC_LAW_Admin_ATA Training	I:\LAW\Admin\ATA Training RW access	Read Wr
<input checked="" type="checkbox"/> UDC_LAW_Admin_ECCLES	I:\LAW\Admin\ECCLES RO access	Read On
<input type="checkbox"/> UDC_LAW_Admin_ECCLES	I:\LAW\Admin\ECCLES RW access	Read Wr
<input checked="" type="checkbox"/> ORG_LAW_Admin_Facilities	I:\LAW\Admin\Facilities RO access	Read On
<input type="checkbox"/> ORG_LAW_Admin_Facilities	I:\LAW\Admin\Facilities RW access	Read Wr
<input type="checkbox"/> ORG_LAW_Admin_Finance	I:\LAW\Admin\Finance RO access	Read On
<input type="checkbox"/> ORG_LAW_Admin_Finance	I:\LAW\Admin\Finance RW access	Read Wr

Figure 41 – Access Rights Search Form

- Click **OK**
- Click **Next**, click **Next**
- Click **Complete**

FSAM TRAINING

Review



Check your knowledge by marking the correct answers.

Q1 Any user may raise a request to create a UDC.

True / False

Q2 Any member of the UDC may modify the group's membership

True / False

Q3 The UDC must have a managing or owning group.

True / False

Q4 You may search for and modify the group's access rights after it is created.

True / False

BUSINESS RULES

- Any users may raise a request.
- Requests are sent and received via e-mail.
- Requests may be approved or declined.
- Any one member of a managing or owning group may approve or decline requests.
- Requests that are not responded to within two weeks are automatically declined.
- Changes made by those with Administrator rights or by members of the relevant owning or ROLE_MBY groups are automatically approved and no e-mail messages are generated.
- When creating a User Defined Cohort, the manager under which you are attaching your group must approve your request. In the case of those with Administrator rights approval is automatically granted.
- You may not reduce the membership of a UDC to zero.
- A user cannot disable the option for a file directory space allocated to a group after the group is created.

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GLOSSARY

AD	Active Directory
FIM	Forefront Identity Management (software)
FSAM	File System Access management (software)
IDM	Identity Management (software)
ITU	Information Technology at the University
ORG	Organisation
ROLE_MBY	Role Managed By Group
UDC	User Defined Cohort