



# Organizations, Roles and Users Preparation

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## Overview

The Self Service Catalog allows you to create a hierarchical structure of parent and child Organizational Units (OU). Each OU can have a parent OU and one or more child, or sub, OUs.

OU structure has the following effects:

- Statistics (such as SLA compliance or the volume of tasks or requests processed) can be consolidated for a parent OU, for accounting or reporting purposes, within the Advanced Reporting modules.
- Different styles (governing the appearance of the screens) can be associated with parent or child organizational units, allowing designers to customize the user experience.
- Sub-OUs can inherit roles and permissions from the parent, facilitating the assignment of responsibilities.
- Sub-organizational units, and therefore the members of that sub OU, inherit all the roles and permissions assigned to its parent organizational unit. Because of this inheritance rule, you must make sure you set up role-based access carefully. An example would be using a bottom-up approach, in which the lowest child OU is assigned the greatest number of roles, and therefore greatest responsibilities, and the higher up the parent OU, the fewer roles are assigned.

Because you are adding sub-OUs to a parent, a helpful way to order your work is to:

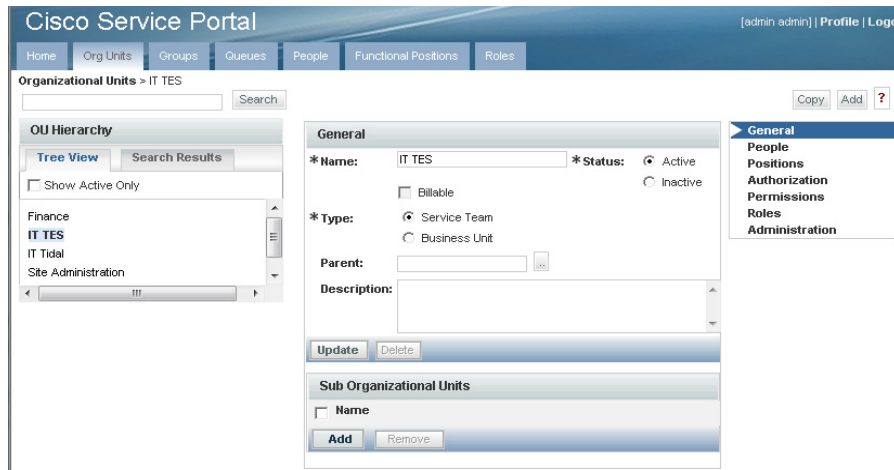
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- Step 1** Create the sub-OU.
  - Step 2** Create the parent OU.
  - Step 3** Add the sub-OUs to the parent OU.
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## Creating a Organizational Unit

To create an OU:

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- Step 1** Log into the Service Portal.
  - Step 2** On the Organization Designer **Home** page, click the **Create Organizational Unit** link in the **Common Tasks** pane.

Additionally, you can create an organization unit by clicking **Add** on the **Org Units** page.



**Figure 3-1** Org Units Tab

- Step 3** (Required) In the **General** pane, enter a name for the new OU. For this example, **IT TES**.
- Step 4** (Required) Select a status for the OU, **Active** or **Inactive**.
- Step 5** Select the **Billable** option if the new OU will have billable business units.
- Step 6** (Required) Select one of the following organizational unit types:
- **Service teams**, comprised of people who deliver services
  - **Business units**, comprised of people who request and receive services
- Step 7** Click **Create**.

## Creating a Role

Access to the capabilities provided by Portal Designer is controlled via standard Role Based Access Control (RBAC). Design personnel can be granted access to all or selected portions of the Portal Designer functionality. Access to the functionality of the portal front-end, including the ability to customize the portal by adding portlets or changing the look-and-feel of the portal pages, may also be controlled via RBAC. Details on the portal-related capabilities and how to assign these to project personnel are given in the *Cisco Service Portal Configuration Guide* and in the online help for Organization Designer regarding roles.

Similarly, end users' ability to access the portal front-end can be controlled via RBAC. Only users with a role that includes the "Access Service Portal" capability will be able to see the "Service Portal" module menu and navigate to the portal pages and portlets.

As described above, Service Portal RBAC allows administrators to control which people, organizational units, or groups can access certain modules, and capabilities they can perform within each module. Further, those permissions can be allowed to operate on all entities (objects) of a particular type, or restricted to a set of named entities. A role, therefore, combines access to a module with one or more capabilities, and in some cases, one or more object-level permissions.

- **Permissions** – grants rights to act upon an object
- **Capabilities** – provides the means to perform certain functions within a module

The Service Portal provides several system-defined roles, which group capabilities into sets of responsibilities that might typically be assigned to participants in a Service Portal implementation. Site administrators can supplement these roles with custom roles, to better suit the division of responsibilities on a particular implementation team.

All members of the organizational unit inherit the roles assigned to the organizational unit. In addition, sub organizational units inherit roles from their parent organizational unit.



**Caution** Roles should be assigned sparingly. Granting a user the capability to manage standards data or define standards means that user will be able to edit all standards definitions and all standards data.

To create a role:

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- Step 1** On the Organization Designer **Home** page, click the **Create Role** link in the **Common Tasks** pane. Additionally, you can create an organization unit by clicking **Add** on the **Roles** page.
  - Step 2** (*Required*) In the **General** pane, enter a name for the new role. For this example, **TES Common Portal Reader**.
  - Step 3** If this role has a parent, enter (or browse) the **Parent** role.
  - Step 4** Select a status for the role, **Active** or **Inactive**.
  - Step 5** Click **Create**.
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## Creating a Person

People are all the individuals who either receive services via **My Services** or provide services via Service Manager, as well as all the administrators, managers, and users of all other application modules.

You must set up all individuals who are system users, whether they are within or external to your organization. The following two statements are important to remember:

- A person is a member of one or more Organizational Units.
- A person can only be "Home" in one OU.

To create a person:

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- Step 1** On the Organization Designer **Home** page, click the **Create Person** link in the **Common Tasks** pane. Additionally, you can create an organization unit by clicking **Add** on the **People** page.

The screenshot shows the Cisco Service Portal Organization Designer interface. The top navigation bar includes 'Home', 'Org Units', 'Groups', 'Queues', 'People', 'Functional Positions', and 'Roles'. The 'People' page is active, showing a list of users on the left and a 'General' form on the right. The form fields are as follows:

- Title: [ ]
- \* First Name: qatest
- \* Last Name: qatest
- \* Status: Active
- SSN: [ ]
- Birth date: [ ]
- Hire Date: [ ]
- \* Language: US English
- \* Time Zone: (GMT-08:00) Pacific Time (US and Canada), Tijuana
- Employee Code: [ ]
- Supervisor: [ ]
- Notes: qatest
- \* Login: qatest
- \* Password: [ ]
- \* Confirm Password: [ ]

**Figure 3-2** People Page

- Step 2** (Required) In the **General** pane, enter the **First Name** and **Last Name** of the person.
- Step 3** (Required) From the **Status** list, select a status for the person, **Active** or **Inactive**.
- Step 4** (Required) From the **Language** list, select the language to display on the user interface for the person. If not provided, English is used.
- Step 5** (Required) From the **Time Zone** list, select the time zone associated with the person's primary address. If not provided, the default server time zone is used.
- Step 6** (Required) In the **Login** field, enter a unique login identifier.
- Step 7** (Required) In the **Password** field, enter a password used to log on to the system. If using Organization Designer, retype the password to confirm. Any character in the character set supported by the application can be used in the password.
- Step 8** (Required) Click **Update / Add**.

## Assigning a Role to a Person

As described above, Service Portal RBAC allows administrators to control which people, organizational units, or groups can access certain modules, and capabilities they can perform within each module.

To assign a role to a person:

- Step 1** On the Organization Designer **Home** page, click the **Create Person** link in the **Common Tasks** pane. Additionally, you can create an organization unit by clicking **Add** on the **People** page.
- Step 2** In the **General** pane, select the role you want to assign to this person.
- Step 3** Click **Add**.