

BaanDEM

**Dynamic Menu Browser setup and
authorization modeling User
Manual**

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About this document

This document describes how DEM modeling influences the behavior of the Dynamic Menu Browser (DMB).

1 Introduction

Purpose of the document

Describe how modeling in DEM influences the behaviour of the Dynamic Menu Browser (DMB).

References

Reference	Description
U7169A US	Dynamic Enterprise Modeler

Definitions, acronyms and abbreviations

Term	Description
DMB	Dynamic Menu Browser

2 Dynamic Menu Browser (DMB)

The Dynamic Menu Browser (DMB) is the dynamic version of the standard menu browser of Baan. The content of the DMB is based upon the modeling of business processes in the DEM repository and a project model modeled with DEM. How the project model is built is explained in "To set up a DMB environment".

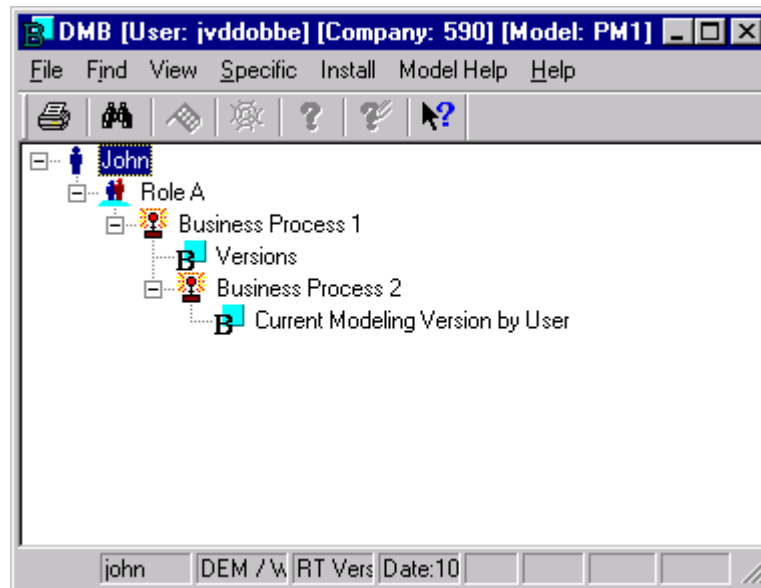


Figure 2-1 Example of the Dynamic Menu Browser

A typical DMB looks like the previous figure. The first level shows the name of the employee (John) that is modeled in DEM for the Baan User that has logged on to the Baan system.

The employee is authorized to perform one or more roles. These roles are displayed on the second level (employee John is authorized for Role A).

The levels beneath the role level show the business processes that contain the activities for which the employee (John), with the assigned role (Role A), is authorized.

If you double-click the node of a business process, the business process is displayed in its graphical form by means of the Process Viewer.

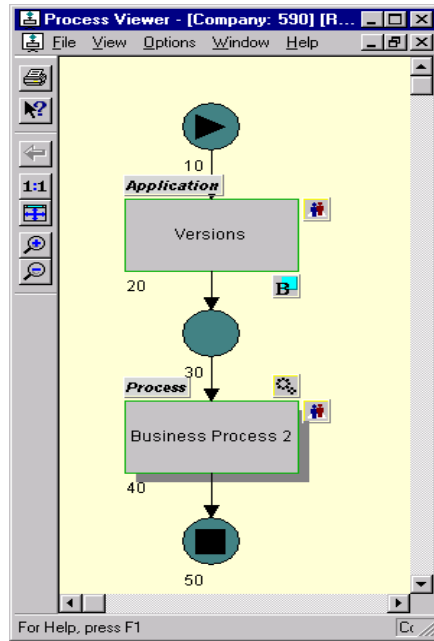


Figure 2-2 Process Viewer showing a business process in its graphical representation

What the modeler must know

See also *Dynamic Enterprise Modeler* (U7169A US).

The following paragraph describes the steps you must take to setup a DMB environment. Each step has a short description, a reference to the session by which you can accomplish the step, and a more detailed section.

To set up a DMB environment

- 1 Set the DEM parameters (tgbrg0135s000).
 - Select the **Use Employee – Project Model link** check box to indicate that an employee must be assigned to a project model before they can play an active role.
If you use this option you can assign an employee to roles, but the employee cannot carry out the activities for which the employee is authorized. For the employee to carry out these activities they must be assigned to the project model.
 - Select the **Evaluate Static Conditions** check box if the static conditions, that are linked to the transitions, must be evaluated. Evaluation of static conditions will enable or disable parts of the business processes.
If you do not use static conditions you must clear this check box because of performance.
 - Select **Activity Order in the DMB** to order the activities according its external code.
 - Select the **Running Baan Component** that will be the default when you model application type activities.
- 2 Create a version and authorize yourself (tgbrg1500m000).
 - Create a new version.
 - Confirm the question when you close previous session to automatically authorize yourself.
- 3 Make the version the current modeling version (tgbrg1110m000).
Select the version to use as the current modeling version.
- 4 Create the roles (tgbrg8110m000).
Create the roles and attach the employees.

- 5 Create your business processes in the repository and assign the roles (tgbg5500m000).
 - Create the business processes
 - Assign the roles at the activity level or business process level.
- 6 Create a project model and import the business processes from the repository (tgbg4500m000).
 - From the specific menu, you can import a range of business processes from the repository.
 - Roles linked to business processes and activities in the repository are inherited by the process model in the project model. You can change the role authorizations in the project model or in the repository.
 - When you import business processes in the project model, business processes that are used in other business processes are automatically marked as a sub process. The business process marked as the sub process will only be displayed in its context and not as a main business process. If the business process can function without its context, clear the sub process check box in the project model.
- 7 Insert the project model in the list of run-time project models for a company. You can set it as the main run-time project model for the specific company. See section " To determine the version and project model of the employee", on how the run-time project model is determined by the DMB (tgbg0105m000).
Select the project model .
- 8 Create the employees (tgbg8135m000).
 - Create an entry for each employee. Make sure the employee is employed.
 - From the specific menu, you can set the Baan User DEM settings (tgbg8136m000).

REMARKS:

If the **Allowed to start activities directly from DMB** check box is selected, the Baan User can start activities from DMB as well as from the Process Viewer. If not, the Baan User can only start activities from the Process Viewer.

You can set the default view settings for the Baan User.

For the **Start DMB with main business processes** option, see the following two paragraphs and the two figures at the end of this section.

- If a Baan User is authorized for an activity, for example, in a hierarchy of business processes, on the fourth level. The Baan User must navigate four levels down before he or she reaches the activity in the DMB tree. To avoid unnecessary navigational actions, you must clear the **Start DMB with main business processes** check box. Only the business process in which the activity, for which the Baan User is authorized, will be displayed in the DMB, which avoids unnecessary navigation.
 - If you select the **Start DMB with main business processes** option, performance will decrease because the system must determine the context of a business process that contains an activity for which a Baan User is authorized. This occurs frequently if a lot of Baan Users connect to the system at the same time.
- 9 Add employees to the project model (tgbrg4500m000).
- Through the specific menu you can link employees to the project model.
- If you have set the **Use Employee – Project Model link** check box in step 1 of this procedure you must add all the employees that you have assigned to the roles in the project model.
- 10 Set the DMB as the default start-up program for the employees. (tgbrg4500m000)

NOTE:

To return to the normal menu browser you can type ttaad2500m000 via the run program command on the File menu and change your user data .

On the specific menu, choose **Configure Baan users by Employee**. Set the DMB as the default start-up program and you can select the company to use.



Figure 2-3 DMB with the Start DMB with main business processes option selected

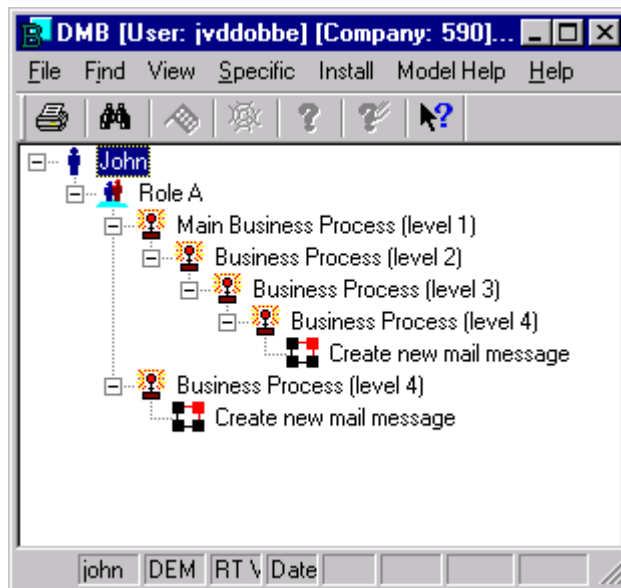


Figure 2-4 DMB with the Start DMB with main business processes option selected and Business Process 4 not marked as a sub-process in the project model (see step 6).



Figure 2-5 DMB with the Start DMB with main business processes option not selected

To add a Baan User to the DMB environment

To add a Baan User follow steps 8 to 10 from the procedure described in the section, "To set up a DMB environment."

DEM authorization mechanism

Roles can be linked on the business process level and activity level in the repository and the project model.

You can link roles by the following two approaches, or by a combination of both:

- **Top-down approach**

(see **Straight forward inheritance (top-down) for an example**)

The top-down approach uses the inheritance mechanism.

For example, if you link a role on business process level, this role is automatically inherited by the activities within the business process. If an activity in the business process has a business process linked, this child business process also inherits the roles.

With this approach, where you give a role authorization for the complete business process, the business process activities, and all levels below these activities, you can change the authorization for individual activities.

To change the authorization for a role linked to an activity, you must disable the inheritance mechanism for this applicable role. When you have completed this action you can exclude or change the authorization of this role. If the role is excluded, the role is disabled for the activity and will not be inherited if a business process is linked to the activity.

When you use the inheritance mechanism, you can stop the inheritance on a certain level and for a certain role in the process model. This can be completed for a role by disabling the inheritance mechanism for this role.

If you simply disable the inheritance mechanism, the role is actually linked to the activity. When you remove the role from which this activity inherited, the role will still exist. In other words, the role now belongs to the activity itself and is no longer linked to the activity via the inheritance mechanism.

In this case, inheritance will continue for business processes linked to this activity. The authorization is still in tact for this activity and all levels below. If the role can no longer be authorized for this activity, you can exclude the role. Now the activity is no longer authorized and business processes linked to this activity will no longer inherit the role.

You can disable the inheritance mechanism for a role linked to an activity if you want to delete the role from which an activity inherits. The role is then directly linked to the activity and you can delete the role from which it was inherited before.

You can exclude a role that was inherited if you want to switch to another role authorization at a certain level in your business process structure.

- **Bottom-up approach (see No inheritance (bottom-up) for an example)**
If the activities within a business process all need different roles, you can choose the bottom-up approach. Link the correct role to each individual activity and set the authorization.

Authorization inheritance mechanism details

In the repository

On activity level, an application authorization can be specified that is the maximum authorization for each role linked to that activity.

On process level, a role can be linked that is inherited to each activity in the process. On this process-role relation, the choice can be made either to use the application authorization on the activity to set application authorization on process level, which is the maximum for that specific role for each activity.

On activity level, the process authorizations are inherited. For each activity, these inherited authorizations can be excluded per role, application authorization from activity level can also be further restricted or application authorization from process-role level can be further restricted.

For each activity of type application, sub-applications can be specified. By default, the activity authorization is inherited by sub applications. For each sub application, the application authorization can be set, which will be inherited by each role.

In the business model

On process level, the process-role relation in the repository is inherited. This process-role relation can be excluded, which means that this role is no longer authorized for any activity in the process, or you can change the application authorization defined in repository. This setting will overrule the repository setting and will be inherited to each activity in the process.

On activity level, the inherited role can be excluded, which means that this role is not allowed to execute this activity (in this business model). The inherited application authorization can also be further restricted.

For each sub application, the application authorization can be set, which will be inherited by each role. For a role linked to the sub application, you can expand its authorization.

To determine the version and project model of the employee

When an employee logs on to the Baan system, using the DMB as the start-up program, the system will determine his or her runtime version and project model in the following steps:

- 1 If the Baan User has a default version and project model.
See the Baan User DEM settings (tgbrg8136m000) session.
- 2 If a main version and project model has been set for the company.
See the Runtime Version, Project Model and Optimization Phase (tgbrg0105m000) session.
- 3 If none of the above are true, the Baan User is notified and asked if he or she wants to manually select a project model.

What the Baan User must know

See also *Dynamic Enterprise Modeler* (U7169A US), Chapter 14 “Run-time model control.”

To change a company

In the DMB, the Baan User can choose to select a different company, than the default.

Go to the **Specific** menu, and select **Change Company**.

To change from one project model to another

In the DMB, the Baan User can choose another project model to work with.

Go to the **Specific** menu and select **Change Project Model**.

To change the visibility interval

In the DMB, you can view business processes in bold when they have been changed in a certain time interval. For example, if you set the visibility interval to 1 day, the changed business processes that have been changed in the previous 24 hours will be displayed in bold.

If you set the visibility interval to 0, no business processes will be checked for changes and as a result, no business processes will be displayed in bold.

Go to the **Specific** menu and select **Change Visibility Interval**.

To use the filter options

From the **View** menu of the DMB, you can choose the types of activities to show in the DMB.

Example 1: Straight forward inheritance (top-down)

In the following example, a business process BP1 has a role (Role_A) linked. All activities within this business process inherit this role. Business process BP2 that is linked to activity named Business Process 2, also has this role linked through the inheritance mechanism.

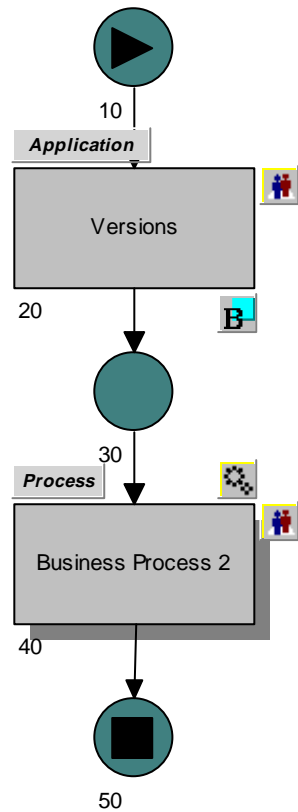


Figure 2-6 Business process BP1

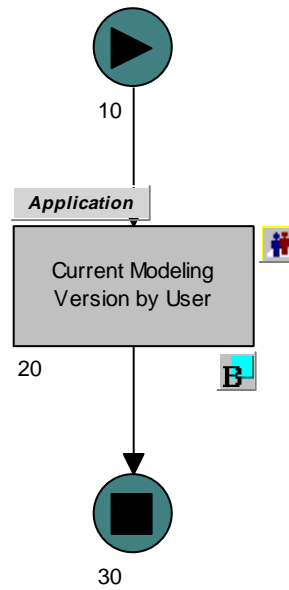


Figure 2-7 Business process BP2

The dynamic menu browser will interpret Example 1 as follows:

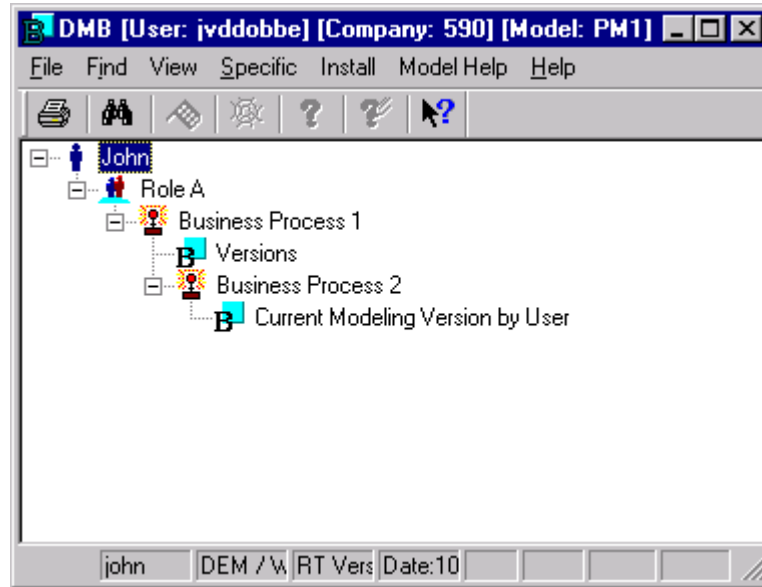


Figure 2-8 Dynamic Menu Browser

Example 2: No inheritance (bottom-up)

In this example, business process BP3 has an activity named Business Process 4 that contains a manual activity. This manual activity has a role (Role_A) linked. No other roles are linked to a manual activity in BP4.

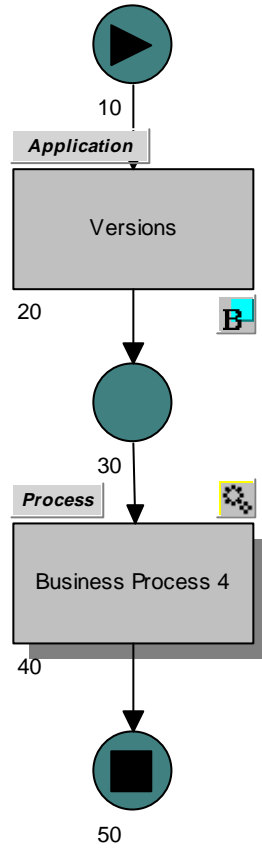


Figure 2-9 Business process BP3

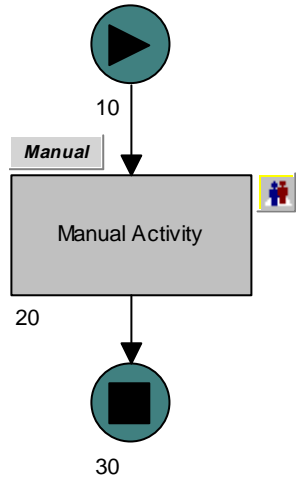


Figure 2-10 Business process BP4

The dynamic menu browser will interpret Example 2 as follows:



Figure 2-11 Dynamic Menu Browser

In this example, the **Start DMB with main Business Processes** option and **Show Main Business Processes** options are selected in the Baan User DEM Settings (tgbrg8136m000) session. You must open business process 3 and then business process 4 to start the manual activity.

To skip the unnecessary levels of business processes, you must clear the **Show Main Business Processes** option. Now only the business processes that contain an activity for which the employee is authorized will be displayed.

Example 3: Inheritance (top-down)

In the following example, a business process BP5 has a role (Role_A) linked. All activities within this business process inherit this role. Business process BP6 that is linked to the activity named Business Process 6 also has this role linked through the inheritance mechanism. Only for the activity named Business Process 7 located in BP6, Role_A is no longer inherited and excluded. Because of this, BP7 does not inherit Role_A, another role (Role_B) is linked to the activity. Employee John is linked to both Role_A and Role_B, to create this example.

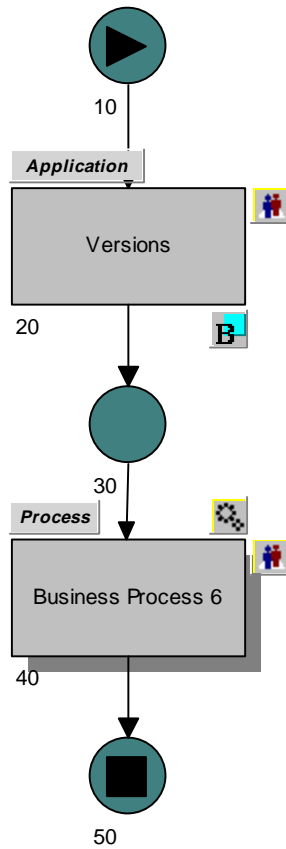


Figure 2-12
Business process BP5

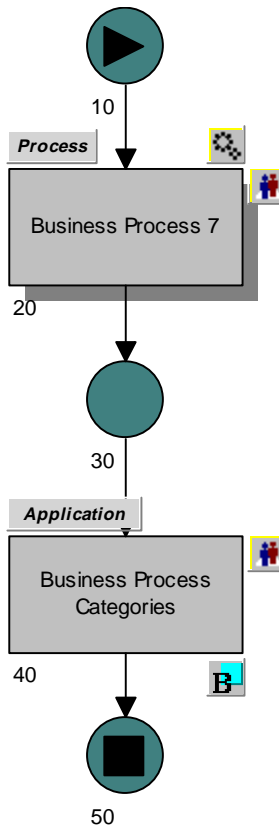


Figure 2-13
Business process BP6

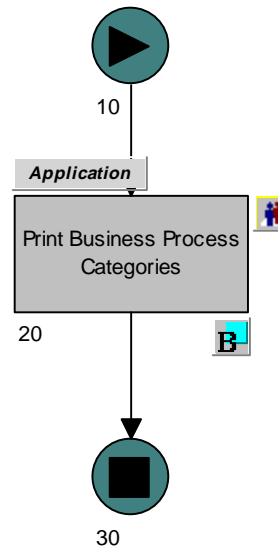


Figure 2-14
Business process BP7

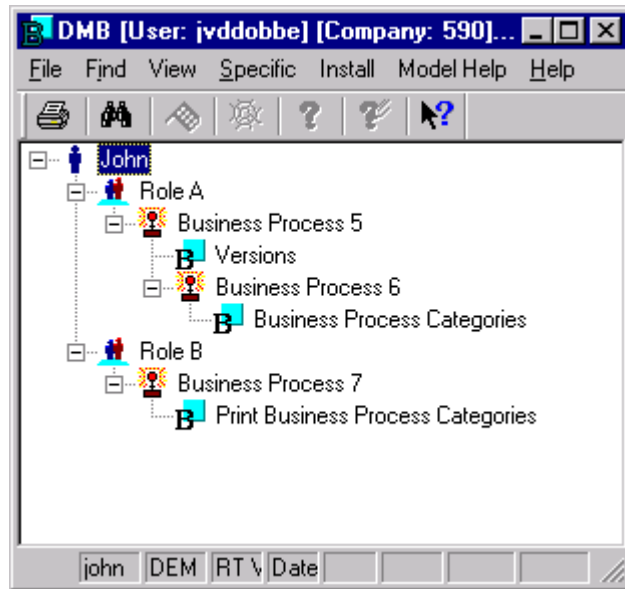


Figure 2-15 Dynamic Menu Browser

The previous figure shows how the DMB interprets the modeling. Employee John is assigned to Role_A and Role_B. As expected, Role_A can only start the activities in BP5 and BP6. Role_B can start the activity in BP7.