Chapter: Understanding and Setting Up Delegated Access

[Bundle 29.

The Setting Up Notifications Framework section has been removed from this chapter. For information about the Notifications framework, see the Working with the Notifications Framework chapter in the Campus Community PeopleBook for Bundle 29.]

This Campus Community PeopleBook chapter provides an overview of the Delegated Access framework and discusses how to use and set up the framework.

Understanding Delegated Access

Delegation is when a person authorizes another to serve as his or her representative for a particular task. With the Delegated Access framework, a user can authorize another user to perform a task on their behalf by delegating access to perform a transaction.

Delegated Access is a framework owned by Campus Community that standardizes *who* can delegate *what* to *whom*. The framework enables you to define what components a delegator (for example, a student) can delegate to one or more proxies (for example, the parents). It integrates with the Constituent Transaction Management (CTM) framework, the New User Registration framework, the Notifications framework (email notification utility), and the PeopleTools security management to grant access to certain pages in your system.

The most common use for delegation in the Campus Solutions system is when a student needs to give access to a parent to view or update his or her personal, academic, or financial information. The parent may be unknown to the system and therefore needs to register and create a user profile to access your system.

Warning! Delegating a transaction is performed by a self-service user in a delivered self-service component called *Share My Information* (SS_CC_DA_SHAREINFO). The setup for Delegated Access must be performed by a security administrator familiar with the Campus Solutions self-service components, the PeopleSoft security, and how you manage your security.

Delegation Terminology

The following terms are important to the understanding of Delegated Access framework and are used throughout the chapter:

Delegation	The act of delegating one's access to another user.
Delegator	A person that delegates access to another user (for example, a student).

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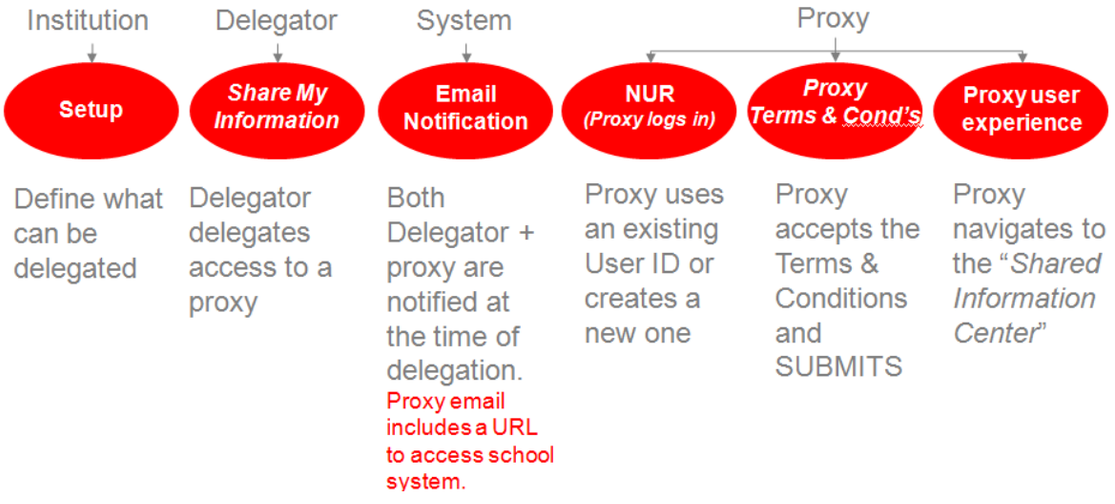
Proxy	A person granted access to act on behalf of another user (for example, a parent).
Delegate	When a delegator delegates someone access to view or update his or her data.
Revoke	When a delegated access is withdrawn.
Delegation Transaction	A set of one or more components and pages whose access a delegator can delegate to a proxy. Those components are contained in a security role associated to a transaction during setup. The role is provisioned to the proxy's user profile for him or her to be allowed to perform the transaction.
Delegated Access Components	The self-service components that are configured for delegated access.
New User Registration framework	Enables the proxy to either create a user ID and password or reuse an existing user ID to sign into the Campus Solutions system and perform the delegated transaction.
Notifications framework	Sends email notifications to the delegator and to the proxy when new transactions are delegated or revoked.

An Overview of the Delegated Access Process

The diagram illustrates an overview of the delegated access process:



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Delegated Access flow

The following is the detailed explanation of the diagram:

1. The Institution sets up the delegation transactions in the Delegation Transaction Setup page. Refer to the Configuring Delegation Transactions section for information about this page. On this page you will set up a delegation transaction by listing a security role that contains one or more components that you want to delegate in a delegation transaction. The system will provision this role to the proxies when access is delegated to them. The components listed for the role that you select must be configured for delegated access.

   See “Step 5: Setting Up Components for Delegated Access” subsection in the Developer Reference for Setting Up Delegated Access section.

   The Delegation Transaction Setup page also enables you to identify the security that the system requires to delegate the transaction. This is done by selecting, in this setup page, the component information the delegators must have in their user profiles in order to delegate the transaction.

2. The delegation process is always initiated by the delegator. Delegators can create proxies and delegate transactions to these proxies through the Share My Information component self-service component. Each time a delegator creates a new proxy, the delegator must first accept the institution’s terms and conditions. Your institution can include their terms and conditions in the delivered Share My Information - Terms and Conditions page. For example, academic institutions in the United States can display their terms and conditions in the Share My Information - Terms and Conditions page to comply with the data privacy regulations under FERPA. Once the terms and conditions are accepted, the delegator enters the name, the relationship and the email address of the proxy to whom he or she wants to delegate access. The delegator then selects the delegation transactions that he or she wants the proxy to view or update. Examples of transactions can include transactions for self-service components such as *View My Class Schedule*, *View My Grades* and so on. The delegator can delegate a transaction to one or more proxies. For example, a student can delegate access to the *Emergency Contacts* transaction to his or her mother and father. Conversely, a proxy can be granted access by multiple delegators (for example, this applies to a case where the parent has more than one child in an academic institution and they all delegate him or her access to their data). The delegator only sees the transaction for which he or she is allowed to delegate.

3. When the delegator identifies a proxy and delegates access to one or more transactions, the system uses the Notifications framework to send a *courtesy* email notification to the delegator to inform him or her that access to his or her data has been delegated to a certain person and an *action* email notification is sent to the proxy’s email address. Both emails list the transactions that have been delegated. In addition, the email sent to the proxy also includes a security key that the proxy will later be required to enter at the time of accepting the proxy terms and conditions and a URL link that the proxy can click to access your Campus Solutions system. The URL is configured by your institution.

   See “Step 9: Setting Up the URL Contained in the Proxy Email Notification to Access New User

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Registration Login Page" subsection in the Developer Reference for Setting Up Delegated Access section.

4. If set up to use the New User Registration framework, the URL link can be embedded with the information to access the New User Registration login page and a *New User Registration Context ID* value (configured for Delegated Access framework) that could transfer the proxy directly to the Proxy Terms and Conditions page after the proxy successfully signs into the system. On the New User Registration login page, the proxy can either reuse an existing user ID (if the proxy already has one) or create a new one. The New User Registration framework enables the reuse or creation of a user ID. With the New User Registration Context ID value, the New User Registration framework, immediately after successfully registering and authenticating the proxy to your system, knows how to provision the proxy with proper security to access the Proxy Terms and Conditions page and how to immediately transfer the proxy to this page.

5. On the Terms and Conditions for Accessing Somebody Else's Data page (this page is also known as the *Proxy Terms and Conditions page*), the proxy is asked to act responsibly with the delegator's data. You can personalize the terms and conditions to fit your institution needs. On this page, the proxy is required to accept or decline the institution's specific terms and conditions, enter the security key given in the received email notification and enter the email address where the email notification was sent. This information is the *signature* that proves the proxy is the right person wanting to access the delegator's data. In addition, the proxy may be asked to enter some personal information. The proxy must accept the terms and conditions stipulated by the institution before accessing the delegator's data. Once proxy submits the information, validation is in place to make sure the right person is trying to access the delegator's information. The Delegated Access framework links the proxy's user ID with the delegator's EMPLID after the system performs a successful validation. If the proxy accepted the terms and conditions, the framework updates the proxy's user profile with the security roles associated with each of the delegated transactions (Proxy Role Name). If proxy declines, then the system does not perform the role provisioning and proxy cannot access any of the transactions delegated by the delegator.

   A proxy can access data only for the delegators who granted the access.

   The Delegated Access framework being integrated with CTM framework allows your system to optionally associate an EMPLID with the proxy. At the time of accepting the terms and conditions, if at least one of the transactions delegated to the proxy requires an EMPLID to be associated with the proxy, Delegated Access uses the proxy's personal information entered at the time of accepting or declining the proxy terms and conditions to call the CTM framework and trigger Search/Match.

6. Once the proxy has accepted the terms and conditions, the system had validated the information and provisioned the proxy's user profile with roles tied to the delegated transactions, the proxy can access the delegated information by navigating to *Self Service, Shared Information Center.* From there, the list of components that were delegated to the proxy by different delegators is displayed. This is an example of a proxy that has been delegated access to three components:

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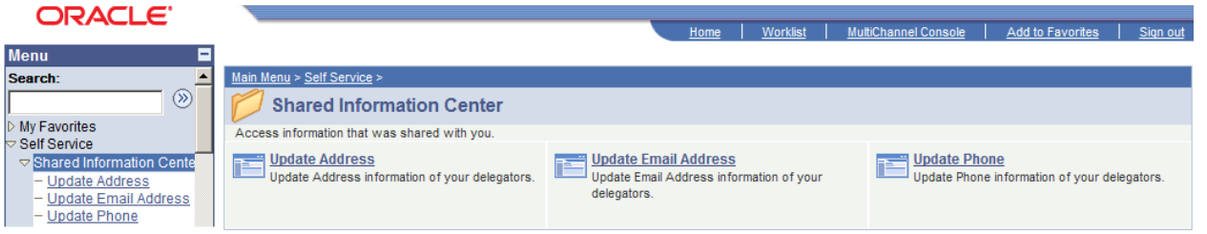

Example of Shared Information Center

When accessing any of these components, if multiple delegators delegated access to the proxy, then the system displays a search record and returns only the names of the delegators who delegated access to the component. The proxy selects the name of the delegator for whom the proxy wants to review or update the data.

Note: The search record is delivered with your system and should override the search record for the self-service components you make available for delegated access. Refer to “Step 5: Setting Up Components for Delegated Access” subsection in the Developer Reference for Setting Up Delegated Access section.

A delegator can revoke proxy access by deselecting one or all of the transactions delegated to a proxy from the *Share My Information - Details* page. When the delegator revokes, the Notifications framework sends an email to the proxy informing which transactions were revoked. Also, when the delegator adds new transactions for delegation, the Notifications framework sends an email to the proxy and to the delegator informing which additional transactions were delegated. Once the proxy has accepted the terms and conditions for a specific delegator, additional delegations or revoked delegations are automatically provisioned or de-provisioned from the proxy’s user profile.

Notes:

- For a proxy to login to your system, you can either use your own login page (proxy will need to have a way to create a new User ID) or customize the New User Registration login sample page delivered with the New User Registration framework. Refer to the “New User Registration framework and Delegated Access” subsection in this section and also refer to the Using New User Registration Framework chapter. This chapter is included in the Campus Community documentation updates for Bundle 27. Campus Solutions delivers a sample New User Registration login page that you can modify according to the requirements of your institution.

- Some self-service components configured for delegated access are delivered with the system as samples. The self-service components that are configured for delegated access are known as *Delegated Access Components*. Refer to the “Review delivered delegation transactions” subsection in the Configuring Delegation Transactions section of this chapter for information about the delivered Delegated Access Components.

- For the delegated transactions to be displayed on the *Shared Information Center* portal folder, the components that you include in your transactions must be configured a certain way. Refer to the “Step 5: Setting Up Components for Delegated Access” subsection.

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[Bundle 29. New]

An administrative user can review the delegations made by a delegator from the *Review Shared Information* component. On behalf of the delegator, the administrative user can grant access to more transactions to an existing proxy and can also revoke access to already delegated transactions. The administrative user cannot create a new proxy on behalf of the delegator. Only updates to an existing proxy can be done.

See Using the Review Shared Information Pages.

Transactions delegated to a proxy can be manually revoked by a delegator, an administrative user, or by the Proxy Access Validation process. The Proxy Access Validation process ensures that a proxy still has access to a delegated component. Validation is performed in real time or through a batch process.

See “Using Proxy Access Validation” in the Understanding Delegated Access section for more information about the Proxy Access Validation process.

See *PeopleSoft Campus Self Service 9.0 PeopleBook*, Using Self-Service for Delegated Access. The Using Self-Service for Delegated Access chapter was released as part of the Campus Community Bundle 27 documentation updates.

Notifications Framework and Delegated Access

The system uses the Notifications framework to notify delegators and proxies of newly delegated or revoked transactions through email messages. Within the Delegated Access framework, *only* email notifications are sent. Delegated Access triggers the notifications from the Share My Information component, the Review Shared Information component, as well as from the Proxy Terms and Conditions page.

[Bundle 29. Updated information about email notifications because of changes to the Notifications framework.]

The system sends an email notification to the delegator and proxy when:

- The delegator creates a proxy and delegates one or more transactions:
    - To the Delegator: A *courtesy* email notification is sent to let the delegator know the list of transactions that were just delegated to a certain person. The delegator is advised to verify his or her account if the delegation was not intentional. (Delivered with your system the notification is sent using the DA_DELEGATOR_GRANT email template).
    - To the Proxy: An *action* email notification is sent to inform on how the proxy can sign into the system and be validated as the proper person trying to access the proper student’s information, and the notification also lists the transactions that have been delegated. The email message includes a security key that the proxy will later be required to enter at the time of accepting the proxy terms and conditions and a URL link that the proxy can click to access your Campus Solutions system. (Delivered with your system the notification is sent using the DA_PROXY_GRANT email template).

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- The delegator delegates one or more transactions to an existing proxy that has already accepted the terms and conditions and therefore been associated with the delegator (a *known* proxy).
    - To the Delegator: The same *courtesy* email described above is sent.
    - To the Proxy: An *information* email notification is sent to inform the *known* proxy of the new delegated transactions. This time, since the proxy is already associated with the delegator, the notification only lists the transactions that have been delegated. No security key is sent. (Delivered with your system the notification is sent using the DA_KNOWN_PROXY_GRANT email template).
- The administrator delegates one or more transactions to an existing proxy on behalf of the delegators:
    - To the Delegator: A *courtesy* email notification is sent to let the delegator know the list of transactions that were just delegated to a proxy. The delegator is advised to verify his or her account if the delegation was not intentional. (Delivered with your system the notification is sent using the DA_DELEGATOR_GRANT email template).
    - To the Proxy: An *information* email notification is sent to inform the *known* proxy of the new delegated transactions. Since the proxy is already associated with the delegator, the notification only lists the transactions that have been delegated. No security key is sent. (Delivered with your system the notification is sent using the DA_KNOWN_PROXY_GRANT email template).

The system sends an email notification to only the proxy (and *not* to the delegator) when:

- The delegator revokes one or more transactions for a proxy or deletes the proxy. In this case, the notification only lists the transactions that have been revoked. (Delivered with your system the notification is sent using the DA_PROXY_REVOKE email template).
- The administrator revokes one or more transactions for a proxy or deletes the proxy. In this case, the notification lists only the transactions that have been revoked. (Delivered with your system the notification is sent using the DA_PROXY_REVOKE email template).
- The proxy declines the terms and conditions. At this stage all the proxy's delegated transactions for the delegator in question are automatically revoked. The notification lists the transactions that have been revoked. (Delivered with your system the notification is sent using the DA_PROXY_REVOKE email template).
- From the Review Shared Information component, the administrator resets the security key for a proxy. The notification contains a new security key along with all the transactions delegated by the delegator. (Delivered with your system the notification is sent using the DA_PROXY_GRANT email template).

In addition, the delegator can use the Share My Information - Details self-service page to resend an email notification that was last sent to the proxy. The administrator can also resend an email notification from the Review Shared Information – Details page.

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Note: The email templates intended to be sent to the proxy and delivered with your system are set up with a custom logic to retrieve the proxy's email address. This logic is delivered with your system and uses the email address entered by the delegator at the time of creating the proxy on the Share My Information - Details page. The custom logic is contained in the application class called SCC_DA:NOTIFICATION:DACustomLogicProvider. The email templates sent to the delegators are set to use the delegator's preferred email address defined in the Email addresses record.

Important: Because Delegated Access is a security feature and sending *courtesy* email notifications to the delegator is part of the business process to avoid security vulnerability, the delegator must have an email address stored inside the Email addresses record (EMAIL_ADDRESSES record) in order to delegate any access. The delivered courtesy email template (DA_DELEGATOR_GRANT) is setup with a criticality of 'Process Dependant' to enforce this (see the setup of this template in the Delivered Setup for the DA_DELG_EMAIL_ON_GRANT Template section). Notice the process ignores or overrides the fact that the delegator has or has not set his or her notification preferences —this is done from the self-service Notification Preferences page.

The email template that contains information on how the proxy can access the delegator's data is also considered 'Process Dependant'.

See the Working with the Notifications Framework chapter in the Campus Community PeopleBook for bundle 29 for information on how to define the email addresses for notification recipients.

Reviewing Delivered Notification Templates for Delegated Access

Delivered with your system are four email templates that are used to send email notifications to complete the Delegated Access process flow. Generic templates establish a common format for notifications.

The following table describes the email templates that are delivered with your system, from which page they are triggered, who receives them and sends them, along with information on how the emails are set up and delivered.

Template Name	Notification Description	Trigger	Recipients
DA_DELEGATOR_GRANT	The system sends this *courtesy* email notification to the delegator after access to the delegator's data has been granted to a proxy. Example: Email Subject: Access to some of your school data has been shared with John Red Email Message: Dear Steven Pratt, access to your data has been granted to John Red (Neighbor) to perform or review the following transactions:	On the Share My Information - Details page, the delegator delegates one or more transactions to a proxy and clicks the Save button. On the Review Shared Information –	Delegator

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Template Name	Notification Description	Trigger	Recipients
	- Emergency Contacts *- Update Contact Information* If you did not authorize this, please sign into your account and make the proper adjustments on the Share My Information page. You are solely responsible for the actions taken on your behalf by the designated person. This is an auto generated email; please do not respond to this message.	Details page, the administrator delegates one or more transactions to a proxy on behalf of the delegator and clicks the Save button.	
DA_PROXY_GRANT	The system sends this *action* email notification to the proxy after access to the delegator's data has been granted to a proxy. The notification states that the proxy has been delegated access for the first time (the proxy is newly created by the delegator). Provides email security key for validation and URL for the proxy to access the system. Example: Email Subject: Access to Steven Pratt's school data has been granted to you. Email Message: John Red, you have been granted access to Steven Pratt's data. You will be able to perform or view the following transactions on Steven's behalf: *- Emergency Contacts* *- Update Contact Information* Instructions:	On the Share My Information - Details page, the delegator enters a new proxy (delegates access to a new contact), delegates one or more transactions, and clicks the Save button. On the Review Shared Information – Details page, the administrator presses the Reset Security Key button.	Proxy

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Template Name	Notification Description	Trigger	Recipients
	1. Click this link to access our school system. You will be asked to sign in using your existing User ID to access our site. If you don't have one already you will be able to create one. 2. After signing into our system, you will be required to accept or decline the "Terms and conditions for accessing somebody else's data". 3. You will also be required to enter the following two pieces of information: a) The following security key: Security Key: 1234567 b) The email address where we sent you this notification. The above steps are only required when it is the first time you register to access Steven Pratt's data. This is an auto generated email; please do not respond to this message.		
DA_KNOWN_PROXY_GRANT	The system sends an informational email notification to a known proxy after access to the delegator's data has been granted to an existing proxy. The notification states that the proxy has been delegated additional access after having previously accepted terms and conditions and going through proper validation. Example: Email Subject: Access to Steven Pratt's school data has been granted to you. Email Text: John Red, you have been granted access to Steven Pratt's data.	On the Share My Information - Details page, the delegator delegates one or more transactions to an existing proxy and clicks the Save button. On the Review Shared Information –	Proxy

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Template Name	Notification Description	Trigger	Recipients
	You will be able to perform or view the following transactions on Steven Pratt's behalf: - *View To Do List* This is an auto generated email; please do not respond to this message.	Details page, the administrator delegates one or more transactions to an existing proxy and clicks the Save button.	
DA_PROXY_REVOKE	The system sends an informational email notification to the proxy after a delegated access is revoked. The notification states the list of transactions that have been revoked. Example: Email Subject: Access to Peter Dryfus' school data has been revoked. Email Text: Jean Taylor, you have been revoked access to Peter Dryfus' data. You will no longer be able to perform or view the following transactions on Peter's behalf: - *Emergency Contacts* If you feel you should still have access to these transactions, please contact Peter Dryfus for inquiry. This is an auto generated email; please do not respond to this message.	On the Share My Information - Details page, the delegator revokes one or more delegated transactions, and clicks the Save button. On the Review Shared Information – Details page, the administrator revokes one or more delegated transactions, and clicks the Save button. On the Proxy Terms and Conditions page, the proxy declines the	Proxy

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Template Name	Notification Description	Trigger	Recipients
		terms and conditions. At that time, the delegated transactions are revoked and the email notification is sent.	

The email templates can be modified under *PeopleTools, Workflow, Notifications, Generic Templates*.

Each template also requires additional setup to be triggered from the Notifications framework under Setup SACR > System Administration > Utilities > Notifications > Notification Setup.

[Bundle 29. New setup options for email notifications.]

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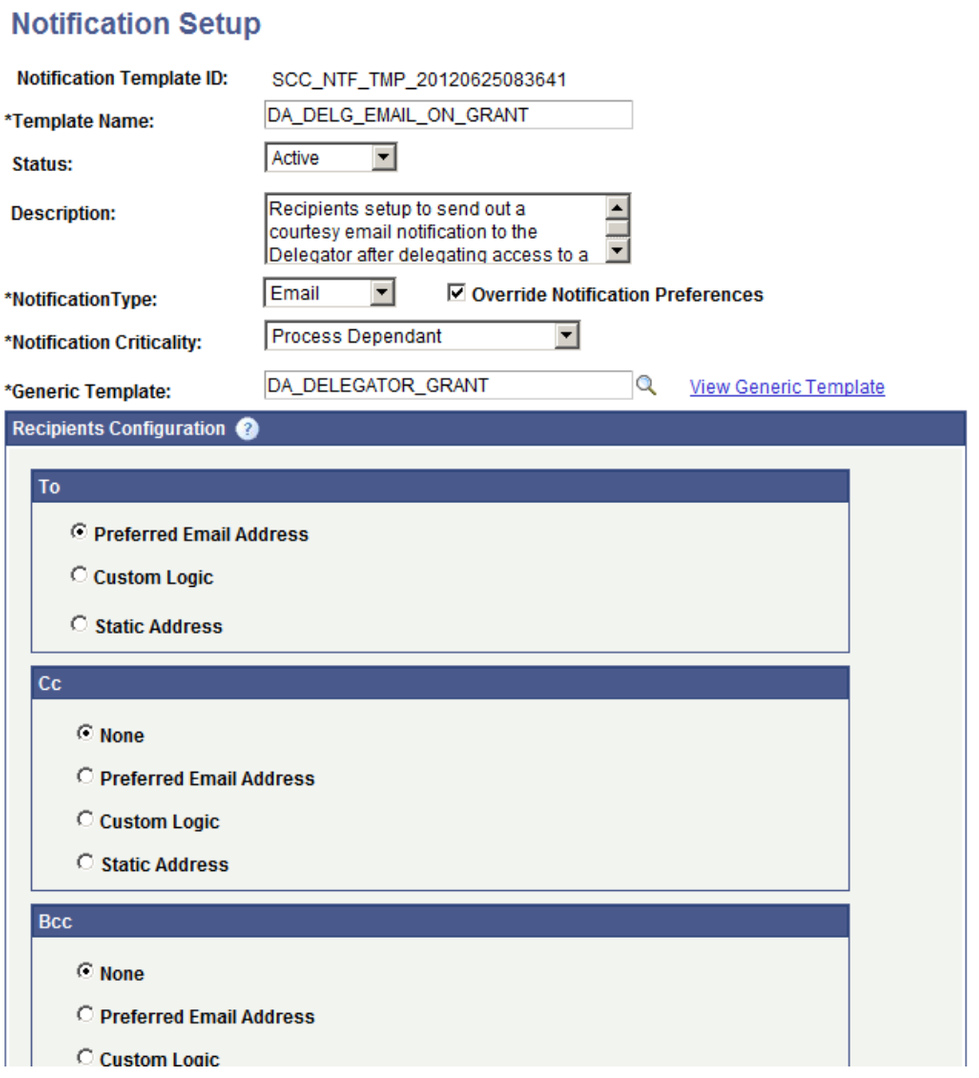
Delivered Setup for the DA_DELG_EMAIL_ON_GRANT Template



Notification Setup page for DA_DELG_EMAIL_ON_GRANT

In the setup page for DA_DELG_EMAIL_ON_GRANT (generic template DA_DELEGATOR_GRANT), Notification Criticality must be set to Process Dependant. This enforces that if the *courtesy* email cannot be sent (for example no email address found for the delegator), the delegation process will not go through.

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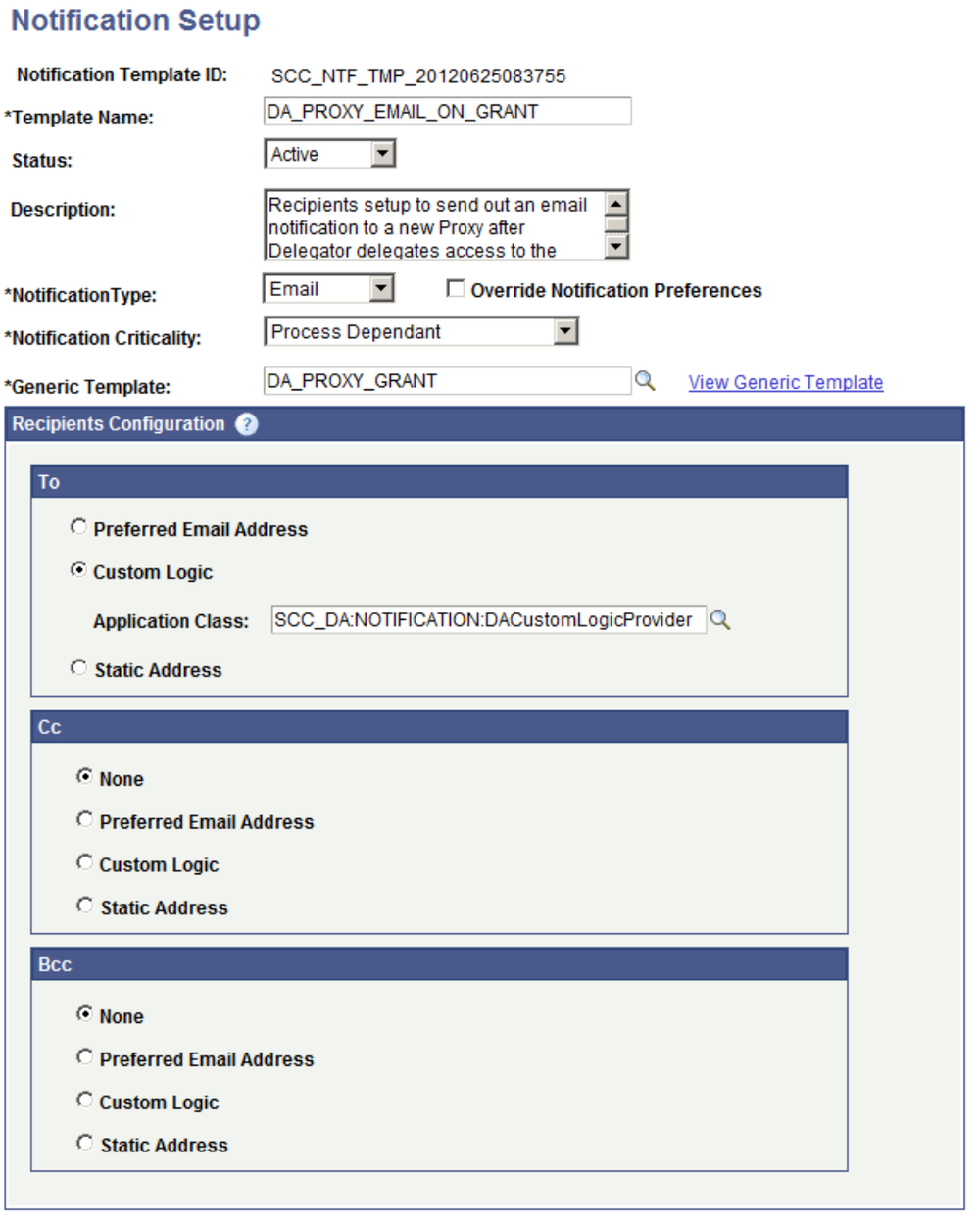
Delivered Setup for the DA_PROXY_EMAIL_ON_GRANT Template



Notification Setup page for DA_PROXY_EMAIL_ON_GRANT

In the setup page for DA_PROXY_EMAIL_ON_GRANT (generic template DA_PROXY_GRANT), Notification Criticality must be set to Process Dependant. This enforces that if the *action* email cannot be sent, the delegation process will not go through. Custom logic is used to retrieve the proxy's email address. This logic is delivered with your system. It uses the email address the delegator provides when the delegator creates the proxy on the Share My Information – Details page. The custom logic is contained in the application class SCC_DA:NOTIFICATION:DACustomLogicProvider.

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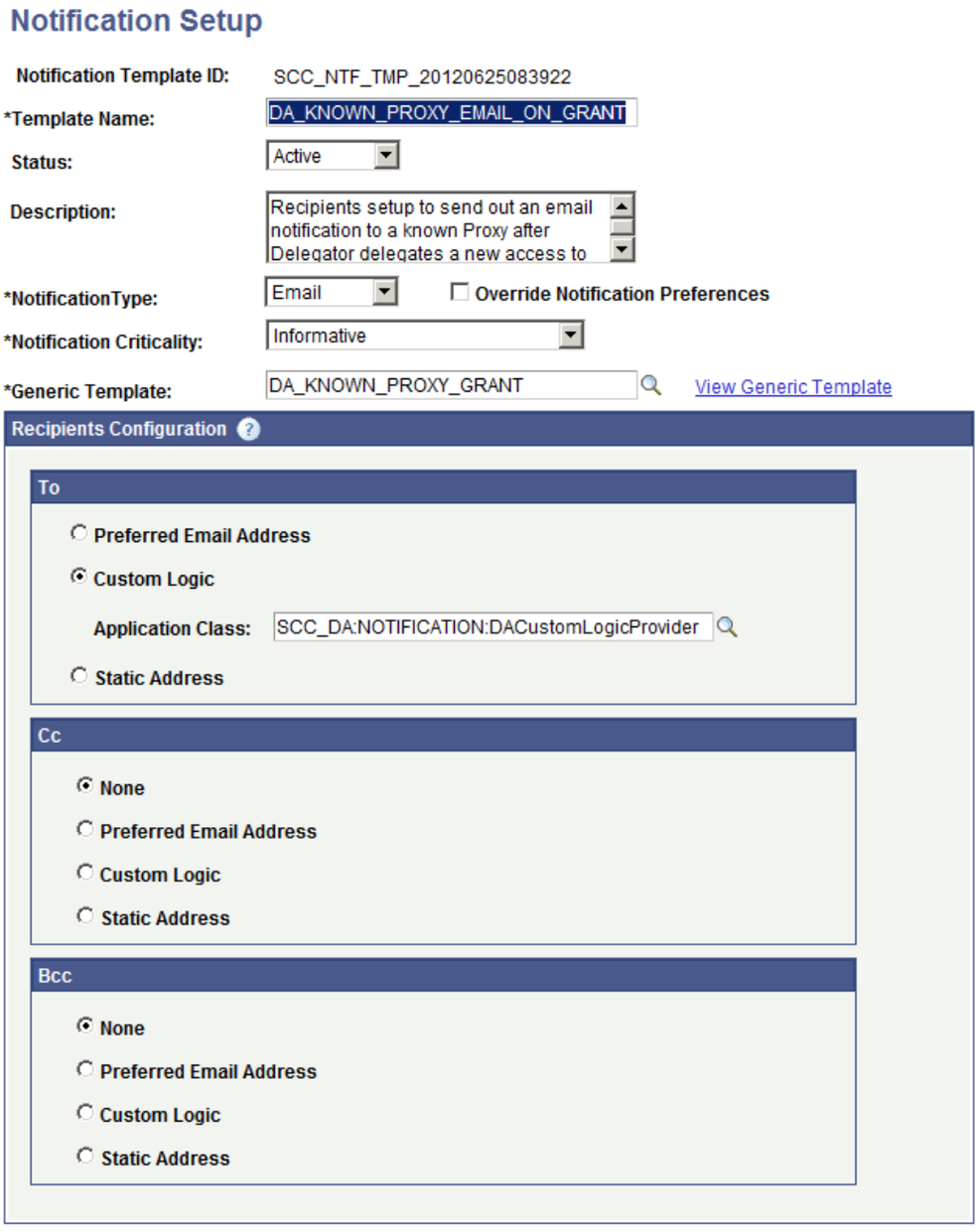
Delivered Setup for the DA_KNOWN_PROXY_EMAIL_ON_GRANT Template



Notification Setup page for DA_KNOWN_PROXY_EMAIL_ON_GRANT

In the setup page for DA_KNOWN_PROXY_EMAIL_ON_GRANT (generic template DA_KNOWN_PROXY_GRANT), Notification Criticality can be set to Informative (optional). The email informs the existing proxy that new transactions have been delegated to him or her. Custom logic is used to retrieve the proxy's email address. This logic is delivered with your system. It uses the email address the delegator provides when the delegator creates the proxy on the Share My Information – Details page. The custom logic is contained in the application class SCC_DA:NOTIFICATION:DACustomLogicProvider.

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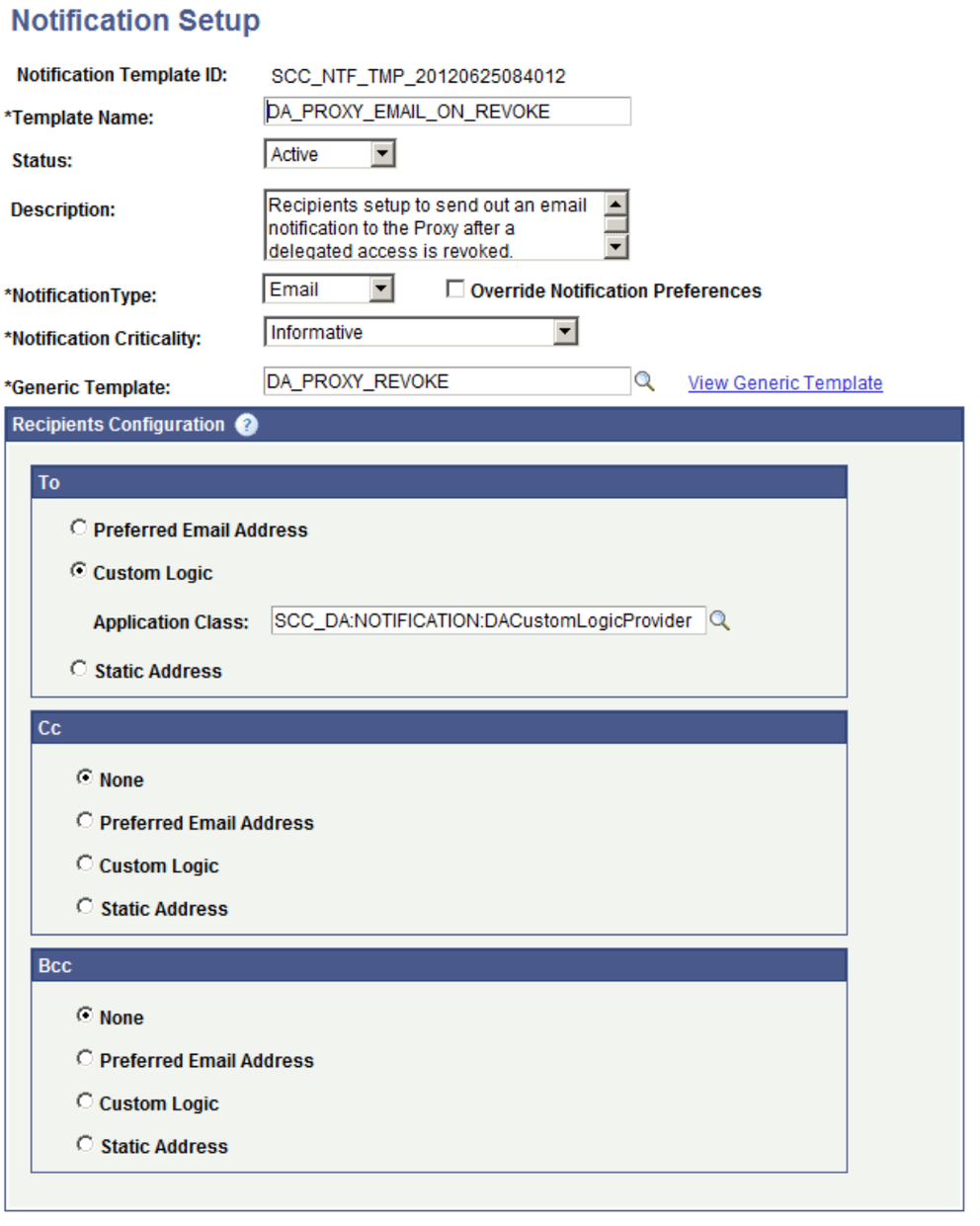
Delivered Setup for the DA_PROXY_EMAIL_ON_REVOKE Template



Notification Setup page for DA_PROXY_EMAIL_ON_REVOKE

In the setup page for DA_PROXY_EMAIL_ON_REVOKE (generic template DA_KNOWN_PROXY_GRANT), Notification Criticality can be set to Informative (optional). The email informs the proxy that existing transactions have been revoked. Custom logic is used to retrieve the proxy's email address. This logic is delivered with your system. It uses the email address the delegator provides when the delegator creates the proxy on the Share My Information – Details page. The custom logic is contained in the application class SCC_DA:NOTIFICATION:DACustomLogicProvider.

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Warning! The notifications are intended to be short and simple messages with the purpose of informing about a specific subject. The list of variables contained in each of the messages is delivered with your system and require extended coding effort to be modified.

At the time of delivering the Delegated Access framework, only these twenty five variables are available. Adding more variables requires substantial programming effort.

- %1 => delegatorName
- %2 => proxyName
- %3 => relationShip
- %4 => Delegated or Revoked Transactions list
- %5 => Delegators Page Name ("Share My Information")
- %6 => URL value
- %7 => security key
- %8 => Nametype
- %9 => Nameinitials
- %10 => Nameprefix
- %11 => Suffix
- %12 => Royalprefix
- %13 => Royalsuffix
- %14 => Title
- %15 => Lastname
- %16 => Firstname
- %17 => Middlename
- %19 => PrefFirstname
- %20 => PartnerLastname
- %21 => PartnerRoyPrefix
- %22 => Display
- %23 => Formal

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- %24 => Birthdate
- %25 => Relationship

You can't change the variable numbers as these are predefined or populated in the Delegated Access app class SCC_DA.NOTIFICATION.NOTIFY code.

See "Configuring the Generic Templates for Notifications Framework" subsection in the Working with the Notifications Framework chapter in the Campus Community PeopleBook for bundle 29.

See the Working with the Notifications Framework chapter in the Campus Community PeopleBook for bundle 29 for information on how to define the email addresses for notification recipients.

New User Registration Framework and Delegated Access

The New User Registration framework, when you integrate it with Delegated Access, enables the proxy to register and authenticate to your system and provides an easy way to transfer the proxy directly to the initial page to start the process of viewing or updating somebody else's data. The framework provides a sample New User Registration login page that you can customize and deploy to suit your institution's requirements. A proxy can use this page to sign into the system using an existing user ID or to register for a new user ID. A suggested approach to allow the proxy to access the New User Registration login page (or your own sign in page) is by including a URL in the email notification sent to the proxy when the delegator creates the proxy and delegates some transactions. The URL is used to transfer the proxy to the login page. The URL must be embedded with the location of your login page, New User Registration Gatekeeper information, and optionally, but recommended, a New User Registration Context value you create for Delegated Access.

New User Registration Context

After signing into your system, the very first thing a *new* proxy must do to start reviewing the delegator's data, is to accept the terms and conditions proving that the proxy will act responsibly with the delegator's data. This is done in the Proxy Terms and Conditions page. Integrating delegated access with New User Registration offers a seamless way of automatically provisioning the proxy with the security to access this page and then to transfer the proxy to this page immediately after successfully authenticating to your system. To do so, a New User Registration Context value specific to Delegated Access needs to be created and embedded in the URL mentioned above (that is the URL contained inside the DA_PROXY_GRANT email template). Delivered with your system and explained below is the New User Registration Context ID SCC_NURCTXT_20120918102441 (NUR_DELEGATED_ACCESS).

Note: A *known* proxy (proxy that has already accepted the terms and conditions for accessing a specific delegator's data and therefore programmatically associated to that delegator), should not see the Proxy Terms and Conditions page again. Therefore, when additional transactions are delegated to a *known* proxy, a URL could be inserted inside the *information* email template (DA_KNOWN_PROXY_GRANT) without being embedded with a New User Registration Context ID. In that case the proxy will be transferred to your home application page after successfully signing into your system.

The New User Registration Context value can be set as follows:

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New User Registration Context

New User Registration Context ID	SCC_NURCTXT_20120918102441
New User Registration Context	NUR_DELEGATED_ACCESS
Description	Proxy to access the DA terms and conditions page
Default:	☐
*Status	Active
*Provisioning Context	Auto Provisioned

Security to Provision — Personalize | Find | First 1 of 1 Last

	Role Name	Description	View Definition
1	CS - DA Proxy TermsCondit	CS - DA Proxy TermsConditions	View Definition

Target Page

URL		
Or :		
Component Name	SS_CC_DA_TERMS_CC	Ss Cc Da Terms Con
Menu Name:	SCC_DA_PROXY	Proxy Terms Conditions Menu
Menu Bar Name:	USE	Use
Item Name:	SS_CC_DA_TERMS_CON	Proxy Terms and Conditions
Page Name:	SS_CC_DA_TERMS_CON	Proxy Terms and Conditions Pg
Access Mode	Update	
*Node Name	<your Default Local Node>	PS HRMS - Local Node

Example of a New User Registration Context value created for Delegated Access

The New User Registration Context ID is the value that you can embed in the URL (the email notification sent to the proxy will include this URL).

The system adds the selected Role Name(s) to the proxy's user profile *just-in-time* after the proxy successfully goes through registration and authentication from the New User Registration login page. Make sure the selected role(s) grants access to the page defined in the Target Page group box.

[Bundle 29. Sample roles that grant access to the Proxy Terms and Conditions page.]

The following sample roles are delivered with your system, which show examples of how you can grant access to the Proxy Terms and Conditions page.

- CS – DA Proxy TermsConditions. This is the Role selected inside the delivered New User Registration Context ID shown above. It grants access to the Proxy Terms and Conditions page without menu navigation (the permission list contained inside the role does not allow a user to

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navigate to the page). The page can only be accessed after being successfully authenticated by New User Registration. This setup is recommended to avoid having a proxy re-accessing the Proxy Terms and Conditions page by mistake.

- CS – DA Proxy TermsCond_Test. Use this role for testing only. It grants the proxy access to the Proxy Terms and Conditions page, but with menu navigation: Self – Service > Proxy Terms and Conditions. This is not a real implementation option, but you can use this role to help your administrators test the functionality without setting up the New User Registration framework, or your own solution to authenticate a proxy to your system.

The entered Target Page information is used to transfer the proxy to a target page, immediately after successfully going through registration and authentication from the New User Registration login page. In the case of Delegated Access, the target page is the Proxy Terms and Conditions. In the example graphic above, the defined target page will transfer the proxy directly to the proxy terms and conditions. The proxy's first action is to reach this page to accept or decline the terms and conditions for accessing the data belonging to someone else. Setting a target page here facilitates the user experience for the proxy (because the proxy need not manually navigate to the target page).

Note: If the proxy already has a user ID to access the Campus Solutions database (for example, the proxy is an alumnus or an employee at your institution), then the proxy can reuse his or her existing user ID to access the delegator's data. The same is true if multiple delegators delegated access to the same proxy. The proxy can reuse the same user ID to access all of the delegator's data. This meets the security convention that ideally one person has one user ID to access a system. The role provisioning and the target page transfer will occur regardless of whether the user ID is newly created or if an existing one was used.

CTM and Delegated Access

Constituent Transaction Management (CTM) framework allows the assignment of an EMPLID while a user is performing a transaction set for CTM. CTM uses the personal data information entered by the user as search data to trigger Search/Match and associate an EMPLID. The process is invisible to the user.

The Delegated Access framework triggers CTM for creating or assigning an EMPLID to the proxy if a delegation transaction requires an EMPLID to be associated with the proxy. This setup decision is made on the Delegation Transaction Setup page. Delegated Access triggers CTM from the Proxy Terms and Conditions page after the proxy accepts or declines the terms and conditions, enters some personal information, and clicks the Submit button. At that time the SCC_DA_SUBMIT web service operation is triggered and if at least one transaction delegated to the proxy is set up to assign an EMPLID, then CTM triggers Search/Match. The constituent data entered by the proxy is stored in the CTM constituent staging tables.

Assigning an EMPLID to a proxy is an *optional* setup because within your institution, you may have delegation transactions that necessitate an EMPLID to be assigned to the proxy and some not. For example, if you configure a delegation transaction to allow a proxy to donate money on behalf of the delegator, you may want to capture as much information as possible for the proxy and create an EMPLID to send further communications. Whereas if you create a delegation transaction to delegate access to the *View My Class Schedule* component, you may not care about gathering personal information for the proxy and to assign him or her an EMPLID.

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On the Delegation Transaction Setup page, for a specific transaction, if you elect to assign an EMPLID to the proxy, you will be required to enter a CTM Transaction Code. On the Proxy Terms and Conditions page, the proxy enters personal information. If that transaction was delegated, at submit time CTM triggers and uses the CTM Transaction Code to call Search/Match and assign an EMPLID to the proxy.

Note: CTM is always consumed as part of a transaction and handles constituent and optionally transaction data. When consumed by Delegated Access, only constituent data is involved. Delegated Access framework does not involve any transaction data. Once the proxy/delegator relationship is confirmed, any updates made on behalf of a delegator are saved directly in the production tables.

Note: The personal information you capture from a proxy at the time of accepting or declining the terms and conditions should be sufficient for Search/Match to use as search data. The Search/Match Parameters to use are defined in the CTM Transaction Code that you enter on the Delegation Transaction Setup page. Refer to the “Step 8: Modifying the Proxy Terms and Conditions page to Include Proper Constituent Fields” subsection.

See *PeopleSoft Campus Self Service 9.0 PeopleBook*, Using Self Service for Delegated Access, Performing a Delegated Transaction, “Accepting or Declining Terms and Conditions”, for information on where the proxy enters constituent information. The Using Self Service for Delegated Access chapter was released as part of the Campus Community Bundle 27 documentation updates.

See *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*, Working with Constituent Transaction Management. An updated version of the Working with Constituent Transaction Management chapter was released as part of the Campus Community Bundle 29 documentation updates.

CTM Transaction Code associated with Delegated Access

Although optional, a CTM Transaction Code can be set up in each of the delegation transactions defined on the Delegation Transaction Setup page. When the proxy clicks the Submit button on the Proxy Terms and Conditions page, the system determines which CTM transaction code to use by evaluating the setup of each of the delegation transaction codes that was delegated to the proxy. Because only one CTM transaction code can be used to process the proxy’s constituent data, the following logic takes place.

If multiple delegation transaction codes exist for the proxy, then the Delegated Access framework evaluates the setup for these delegation transaction codes in the following way:

- If one delegation transaction code is set up with Assign EMPLID to Proxy = *Y*, then use its CTM transaction code to save the proxy’s constituent data in CTM staging records and trigger Search/Match.
- If multiple delegation transaction codes are set up with Assign EMPLID to Proxy = *Y*, then from these transaction codes, use the first encountered CTM transaction code to save the proxy’s constituent data in CTM staging records and trigger Search/Match.

For example, a proxy has been delegated the following four transactions:

- Transaction 1: Set up with CTM Transaction Code = ‘AAAA’ and Assign EMPLID to Proxy = ‘Y’
- Transaction 2: Set up with CTM Transaction Code = ‘BBBB’ and Assign EMPLID to Proxy = ‘Y’

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- Transaction 3: Set up with CTM Transaction Code = <blank> and Assign EMPLID to Proxy = ‘N’
- Transaction 4: Set up with CTM Transaction Code = ‘CCCC’ and Assign EMPLID to Proxy = ‘Y’

In the example above, the logic uses the CTM Transaction Code for the first transaction encountered. In this case, CTM Transaction Code ‘AAAA’ will be used.

If none of the transactions are set up to assign an EMPLID, then CTM is simply not triggered and none of the personal information entered by the proxy inside the Proxy Terms and Conditions is saved in the CTM staging tables.

Note: A same CTM Transaction Code can be reused for your transactions. Use a different value if different Data Update Rule or Search/Match Parameters should be used.

How CTM processes the New User Registration and Delegated Access transactions

If the proxy went through New User Registration to create a user ID, then the CTM Transaction Code *NEW_USER_REGISTRATION* is performed (this transaction code is delivered with your system). Once the proxy has entered constituent data and clicks the Submit button on the Proxy Terms and Conditions page, if a delegated transaction exists with a CTM Transaction Code, then the CTM Constituent Staging component indicates that a second transaction has been performed.

Below are examples of what the CTM Constituent Staging component would look like depending on if a user ID is created through New User Registration and if an EMPLID should be associated with the proxy for at least one of the delegated transactions.

Example of what the Constituent Staging component would look like after performing New User Registration and Delegated Access when an EMPLID is needed to be assigned (Assign Proxy EMPLID was set to ‘Y’), but no EMPLID was found.

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Summary Information | Constituent Details | Participation Details | Additional Personal Info | Regional

Temporary ID:	1810	**Name:**	Fletcher, Mary
User ID:	MFLETCHER	**Constituent Status:**	New ID Created
Created Datetime:	01/10/2012 4:23PM	**ID:**	1049
Created By:	MFLETCHER		Post Transaction Data

Related Transactions Personalize | Find | View All | First 1-2 of 2 Last

Status	Transaction Code	Transaction Name	Status Date	Online	Search/Match Results
Posted	DELEGATE_ACCESS	Delegate Access	01/10/2012	☑	Search/Match Results
Posted	NEW_USER_REGISTRATION	New User Registration	01/10/2012	☑	Search/Match Results

Save | Return to Search | Previous in List | Next in List | Notify | Refresh

Example of what the Constituent Staging component would look like after performing New User Registration and Delegated Access when an EMPLID is needed to be assigned (Assign Proxy EMPLID was set to 'Y'), and an EMPLID was created.

Summary Information | Constituent Details | Participation Details | Additional Personal Info | Regional

Temporary ID:	82	**Name:**	Ro, Juliette
User ID:	JULIETTE	**Constituent Status:**	Loaded
Created Datetime:	11/10/2012 11:47AM	**ID:**	
Created By:	JULIETTE		Run Search/Match/Post

Related Transactions Personalize | Find | View All | First 1 of 1 Last

Status	Transaction Code	Transaction Name	Status Date	Online	Search/Match Results
Posted	NEW_USER_REGISTRATION	New User Registration	11/10/2012	☑	Search/Match Results

Save | Return to Search | Previous in List | Next in List | Notify | Refresh

Example of what the Constituent Staging component would look like when after performing New User Registration by creating a new user ID and Delegated Access when no EMPLID is needed to be assigned (Assign Proxy EMPLID was set to 'N') for at least one of the delegated transactions.

Note: The CTM Transaction Code *NEW_USER_TRANSACTION* is performed only when the user creates a user ID through New User Registration framework. If the user uses an existing user ID, no CTM transaction is involved. Only at user ID creation time the user may be asked to enter some personal information and this information needs to be stored in the CTM constituent staging records because no EMPLID exists for this user.

See *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*, Using New User Registration Framework. This chapter was released as part of the Campus Community Bundle 29 documentation updates.

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See “Step 4: Setting Up the CTM Transaction for Delegated Access (Optional)” subsection in the Developer Reference for Setting Up Delegated Access section.

Entity Registry and Delegated Access

The Delegated Access framework uses the Entity Registry feature for validating and processing the proxy information at the time when the proxy accepts or declines the terms and conditions.

The entities associated with Delegated Access are delivered with your system.

Delivered entities related to delegated access data

The following table lists the delivered Delegated Access entities at the time of delivering this chapter.

Entity ID	Entity Name	Production Record
SCC_ENTITY_20120419155543	DA Proxy	SCC_DA_PROXY
SCC_ENTITY_20120419155813	DA Proxy Transactions	SCC_DA_PRXY_TXN

See Also

PeopleSoft Campus Community Fundamentals 9.0 PeopleBook, “Setting Up Entity Registry" which was posted to My Oracle Support as part of the Campus Community documentation updates for Bundle 27.

Contact and Transaction Statuses

Contact statuses indicate whether the proxy has accepted or declined the terms and conditions for a specific delegator. The delegator can keep track of these statuses on the Share My Information - Summary page and the administrators from the Review Shared Information – Summary page. Contact statuses are:

- *Unknown:* Indicates that it is not known whether the proxy has accepted or declined the terms and conditions page.
- *Accepted:* Indicates that the proxy has accepted the terms and conditions.
- *Declined:* Indicates that the proxy has declined the terms and conditions.

Internal transaction statuses enable you to track the progress of each delegation transaction from the time the delegator delegates the transaction to the time the access is revoked. These internal statuses do not appear in self service or any other Campus Solutions pages. Combined with the contact statuses, they are used to derive and display the *transaction status* values. Internal transaction statuses are:

- *Access Granted*: Indicates that the transaction has been delegated to the proxy.
- *Revoked:* Indicates that the transaction has been revoked from the proxy.

Transaction statuses enable the delegator to track the progress of each delegation transaction from the time the delegator delegates the transaction to the time the access is revoked. These statuses appear on the Share My Information - Summary self-service page. Transaction statuses are:

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- *Submitted:* Indicates that the transaction has been delegated to the proxy, but the proxy hasn't accepted the proxy terms and conditions yet.
- *Access Granted:* Indicates that proxy has accepted the proxy terms and conditions and can now access the delegator's data.
- *Revoked*: Indicates either that the proxy has declined the proxy terms and conditions or the delegator has revoked the transaction from the proxy.
- *Pending:* Indicates the transaction has been delegated to the proxy, but is pending proxy acceptance to the proxy terms and conditions.

The following table describes the transaction statuses associated with the contact statuses that appear on the Share My Information - Summary page:

Contact Status	**Transaction Status**	**Internal Transaction Status**	**System assigns these statuses when**
Unknown	*Submitted*	*Access Granted*	On the Share My Information - Details page, the delegator creates a new contact (a new proxy), adds the contact details and delegates one or more transactions and clicks the Save button.
Accepted	*Access Granted*	*Access Granted*	Proxy clicks the I Accept button on the Proxy Terms and Conditions page. Delegator delegates new transactions to a proxy that has already accepted the terms and conditions (a *known* proxy).
Accepted	*Revoked*	*Revoked*	Delegator revokes a transaction after the proxy has accepted the terms and conditions, and then clicks the Save button on the Share My Information - Details page. **Note:** Transactions that are revoked are not shown on the Share My Information – Summary page. If all the transactions delegated to a same proxy are revoked, the message: *"No access is currently delegated to this contact*" is displayed.
Unknown	*Revoked*	*Revoked*	Delegator revokes a transaction before the proxy accepts or declines the terms and conditions, and then clicks the Save button on the Share My Information -

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Contact Status	Transaction Status	Internal Transaction Status	System assigns these statuses when
			Details page. **Note:** Transactions that are revoked are not shown on the Share My Information - Summary page. If all the transactions delegated to a same proxy are revoked, the message: *"No access is currently delegated to this contact*" is displayed.
Declined	*Revoked*	*Revoked*	Proxy clicks the I Decline button on the Proxy Terms and Conditions page. **Note:** Transactions that are revoked are not shown on the Share My Information - Summary page. In this case, all the transactions delegated to a same proxy are revoked and the following message is therefore shown: *"No access is currently delegated to this contact*".
Declined	*Pending*	*Access Granted*	Delegator delegates a new transaction to a proxy that has already declined the terms and conditions, and then clicks the Save button on the Share My Information - Details page.

See *PeopleSoft Campus Self Service 9.0 PeopleBook*, Using Self-Service for Delegated Access. The Using Self-Service for Delegated Access chapter was released as part of the Campus Community Bundle 27 documentation updates.

Revoking Proxy Access

[Bundle 29. Added information about the Proxy Access Validation engine.]

A proxy access to a transaction can be manually revoked either by a delegator from the Share My Information – Details self-service page or by an administrator from the Review Shared Information – Details page by simply deselecting a previously delegated transaction. At that moment, the transaction status is set to *Ended* (or marked in the record as *Revoked)* and evaluated to determine if the same transaction is also delegated by a different delegator. If that is the case, the logic does not remove the role associated to the revoked transaction from the proxy's user profile (the proxy still needs to have access to the delegated components to access other delegators' data). If no other delegators exist, then the proxy's user profile is automatically updated. At the time of revoking the transaction, the Notifications framework is triggered to notify the proxy via email about the revoked transactions.

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A proxy's access to a transaction can also be programmatically revoked by the Proxy Access Validation (PAV) engine.

See Understanding Proxy Access Validation for information about the PAV process.

When a transaction is revoked, a revoke reason is given based on the condition it was revoked. The following table describes the various revoke reason values along with how they are assigned.

Revoke Reason Values	**From where this value is set**	**Who or what sets that value**	**Results**
Manual Revoke	In the *Share My Information – Details* component, when the Delegator manually deselects a Transaction Name. In the *Review Shared Information – Details* component, when the administrator manually deselects a Transaction Name.	• Delegator • Administrator	• Transaction status is set to *Ended* (or marked in the record as *Revoked)* for the delegator/ proxy relation. • Email notification is sent to the proxy. • Proxy's user profile is updated by removing the role tied to the revoked transaction *if* the proxy's user profile is known *and* no other delegator delegated the proxy access to the same transaction.
Proxy Delete	In the *Share My Information – Summary* component, when the Delegator manually deletes a proxy. In the *Review Shared Information – Summary* component, when the administrator manually deletes a proxy.	• Delegator • Administrator	• Transaction status for all delegated transaction is set to *Ended* (or marked in the record as *Revoked)* for the delegator/ proxy relation. • Email notification is sent to the proxy. • Proxy's user profile is updated by removing the role tied to the revoked transaction(s) if the proxy's user profile is known and no other delegator delegated the proxy access to the same

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			transaction(s).
Declined Terms and Conditions	In the Proxy Terms and Conditions component when the Proxy declines the terms and conditions.	Proxy	• Transaction status for all delegated transaction is set to *Ended* (or marked in the record as *Revoked)* for the delegator/ proxy relation. • Email notification is sent to the proxy.
Security	When the revoke proxy access option selected for the transaction is *Delegator no longer has access to delegate the transaction*. The following validation occurs: • At the moment the delegator accesses the Share My Information – Summary component. • At the moment the administrator accesses the Review Shared Information – Summary component • At the moment the proxy accesses a delegated component and activates the component search record.	PAV real-time logic	• Transaction status is set to *Ended* (or marked in the record as *Revoked)* for the delegator/ proxy relation. • Transaction record (SCC_DA_PRXY_TXN) is flagged to be later picked up by the PAV batch process.
	The Proxy Access Validation batch process runs.	PAV batch process	• Transaction status is set to *Ended* (or marked in the record as *Revoked)* for the delegator/ proxy relation. • Email notification is sent to the proxy. • Proxy's user profile is

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			updated by removing the role tied to the revoked transaction *if* the proxy's user profile is known *and* no other delegator delegated the proxy access to the same transaction.
Inactive Transaction	When the revoke proxy access option selected for the transaction is *Transaction Inactivated*. The validation occurs: • At the moment the delegator accesses the *Share My Information – Summary* component. • At the moment the administrator accesses the *Review Shared Information – Summary* component • At the moment the proxy accesses a delegated component and activates the component search record.	PAV real-time logic	• Transaction status is set to *Ended* (or marked in the record as *Revoked)* for the delegator/ proxy relation. • Transaction record (SCC_DA_PRXY_TXN) is flagged to be later picked up by the PAV batch process.
	The Proxy Access Validation batch process runs.	PAV batch process	• Transaction status is set to *Ended* for the delegator/ proxy relation. • Email notification is sent to the proxy. • Proxy's user profile is updated by removing the role tied to the revoked transaction *if* the proxy's user profile is known *and* no other delegator delegated the proxy

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			access to the same transaction.

Note: The revoke reason value can only be seen by an administrator from the Review Shared Information component. The delegator does not see the revoked transactions from the Share My Information component.

Delegated Access Validation

The validation process runs when the proxy clicks the I Accept or I Decline button on the Proxy Terms and Conditions page, enters the security key and email address, and optionally some personal information, and clicks the Submit button. The validation process contains the criteria to make sure the right person is trying to access the delegator's data. This is needed because at the time of delegating access, the delegator and the system have no *technical* knowledge about the proxy. Both do not know the proxy's user ID or if an EMPLID exists or not for the proxy. All they know is the proxy's name, email address, and relationship with the delegator.

Using the security key and the email address entered by the proxy on the Proxy Terms and Conditions page, the validation process associates the proxy (proxy's user ID) with the delegator (delegator's EMPLID). This is possible since the security key is unique for the delegator-proxy combination.

Once the validation is successful, and if the proxy has accepted the terms and conditions, the system updates the proxy's user profile by provisioning the security role(s) associated with the delegated transaction(s). If the proxy declined the terms and conditions, provisioning is not performed and the delegated transactions are automatically revoked.

Finally, if at least one of the delegated transactions is set up with the Assign EMPLID to Proxy option selected, the system uses the first corresponding CTM Transaction Code encountered to trigger Search/Match and assigns an EMPLID to the proxy.

The proxy validation process is only performed once per proxy-delegator combination. If a proxy has already registered, and has been validated and tied to a specific delegator, the proxy will not go through this validation again.

The Delegated Access validation logic described above is performed as part of a web service: the *SCC_DA* web service contains the SCC_DA_SUBMIT (Delegate Access Submit) service operation.

See "CTM and Delegated Access" in the "Understanding Delegated Access" section for more information about how CTM assigns an EMPLID to a proxy.

Using Proxy Access Validation

[Bundle 29. New]

This section discusses:

- Validating a proxy's access in real time

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- Validating a proxy's access using a batch process

Understanding Proxy Access Validation

[Bundle 29. New]

The Proxy Access Validation (PAV) logic evaluates different conditions that determine whether or not a proxy should have access to a delegated component. The conditions are defined for each of the delegation transactions in the Delegation Transaction Setup component.

The PAV engine uses any one of the following conditions to determine whether to revoke a proxy's access:

- Never. The proxy will never have his or her access to the transaction revoked.
- Transaction status is set to *Inactive*.
- Delegator no longer has the security access to delegate the transaction.

If any one of the above conditions is met, the PAV logic revokes the proxy access to the transaction. It will set the transaction status to *Ended* (or marked in the record as *Revoked)* and provide a revoked reason that depends on which condition is met. The process could also result in the removal of the security role tied to the transaction from the proxy's user profile. Removing the security access from the proxy's user profile depends if another delegator has delegated the same transaction to the proxy. In that case the proxy's user profile is not updated because the proxy will need to continue having access to the components to access other delegators' data. For example, Mary is the mother of Jane and Luke. Both are students in your institution and they both delegated access their mother to their *View My Class Schedule* component. If this transaction is set to revoke the proxy access if the *delegator no longer has access to delegate the transaction* and Jane lost her access to a component needed to delegate the View My Class Schedule transaction, then Mary will see her access to that transaction being revoked for Jane, but still granted for Luke. In this case PAV will not delete the role tied to the View My Class Schedule transaction from Mary's user profile. Mary still needs to keep her access to view Luke's data.

See the Configuring Delegation Transactions section for information on how to setup a transaction with these proxy access revoke conditions.

To make sure the proxy has the proper access to the delegated transactions at all times, the PAV engine is triggered two different ways:

- Real-time processing. The proxy access validation occurs *just in time,* at the time a delegated access actor (a proxy, a delegator or an administrator) accesses a component configured for PAV. Running the process in real time ensures that proxies can only access what they are allowed to access, and that delegators and administrators see an accurate picture of the delegated transactions. There is no need to wait for the batch process to run. It also ensures that if the batch process fails or was not scheduled, the security check is enforced.

  See "Validating a proxy access using the PAV real time process."

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- Batch processing. This allows the PAV engine to validate multiple transactions, delegators and proxy relationships at the same time. Proxy access validation is performed *ahead of time*. The batch process is an application engine process called SCC_DA_PAV and can be triggered from Campus Community, Delegated Access, Proxy Access Validation. It uses the same validation logic used in real-time processing. In addition, during a batch process extended database updates and notification framework calls are executed. For example, roles can be added to or removed from proxy user profiles, and email notifications are sent.

  See “Validating a proxy access using the PAV batch process.”

Understanding Real Time Proxy Access Validation

In real-time processing, the PAV engine validates whether a proxy should still have access to a component at the time the:

- Proxy accesses a delegated component. The PAV engine evaluates if the proxy has the security necessary to access the desired component. The PAV is triggered from the delegated component generic search record SCC_DA_SRCH_VW.

  See Step 5: Setting Up Components for Delegated Access in the Developer Reference for Setting Up Delegation Access section for information on how the search record is used.

  The search record triggers the PAV engine and retrieves the user ID of the proxy that is logged in, as well as the transaction code that is related to the component that the proxy is trying to access. Based on the transaction code retrieved, the process evaluates whether the revoke conditions for the transaction are met, and then returns in the search record only the names of the delegators for which the proxy still has access.

  For example, Mary is the mother of Jane and Luke. Both are students to your institution and they both delegated access their mother to their *Emergency Contacts* component. If this transaction is set to revoke the proxy access if the *delegator no longer has access to delegate the transaction* and Jane had lost her access to a component needed to delegate this transaction, then the PAV real-time logic will revoke Mary’s access to access Jane’s data and the search record to access the *Emergency Contacts* component will only return the name of Luke. Mary won’t be able to access Jane’s data.

  Another example would be if the *Emergency Contacts* transaction is set up to revoke proxy access when the transaction is made inactive. Let’s pretend that this transaction has been inactivated and Mary attempts to access it. She navigates to the component and through the search record, the PAV process triggers and after evaluation will revoke Mary’s access to the component for all the delegators. Mary will see a search record to access the Emergency Contacts component, but it will return ‘No matching values were found”. Mary will not be able to access any of her delegators since she lost access due to the transaction being inactivated.

- Delegator accesses the Share My Information component.

  The PAV engine evaluates all the proxies created by the delegator to determine whether or not any of the proxies meet any one of the revoke conditions selected in the transaction codes they have been delegated. The PAV engine is triggered from the SS_CC_DA_SHAREINFO

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component. The Share My Information – Summary page will only display the proxies that have current access to the delegated transactions.

See also “Using the Share My Information Summary – Page” section in the “Using Self Service for Delegated Access” chapter. This chapter was released as part of the Campus Community Bundle 27 documentation updates.

- Administrator accesses the Review Shared Information component. The PAV engine evaluates all the proxies created by the selected delegator to determine whether or not any of the proxies meet any one of the revoke conditions selected in the transaction codes they have been delegated. The PAV is triggered from the SCC_DA_ADMIN component. The Review Shared Information – Summary page will only display the proxies that have current access to the delegated transactions.

  See “Using the Review Shared Information – Summary Page.”

When the PAV engine determines that a proxy’s access should be revoked from a certain transaction, it performs the following updates to the database:

- The Transaction Status is changed from ‘Access Granted’ (AG) to ‘Revoked’ (RV). This value is stored in SCC_DA_PRXY_TXN.SCC_DA_TXN_STATUS record field.
- The Revoke Reason field is populated with the reason based on why the access was revoked.

  See the Revoking Proxy Access section for information on the revoke reason values.

- The transaction record is flagged so that it can be picked up by the PAV batch process, and the Notifications framework can send an email notification to the proxy and its user profile can be properly updated. In the SCC_DA_PRXY_TXN record, the SCC_DA_RLTM_UPD field is set to ‘Y’.

Note: When PAV is processed in real time, no email notification is sent to the proxy and the proxy’s user profile is not updated. Those two actions are instead later performed by the PAV batch process.

Understanding Batch Proxy Access Validation

Instead of waiting for a proxy, a delegator, or an administrator to access a component, use the PAV batch process to evaluate multiple transactions or delegators and proxy relationships to validate a proxy’s access to a transaction.

When the PAV process determines that a proxy’s access should be revoked from a certain transaction, it updates the database:

- The Transaction Status is changed from Access Granted’ (AG) to ‘Revoked’ (RV). This value is stored in SCC_DA_PRXY_TXN.SCC_DA_TXN_STATUS.
- The Revoke Reason field is populated with the reason based on why the access was revoked (see Revoke Reason values table).

  See the Revoking Proxy Access section for information on the revoke reason values.

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- The Notifications framework is triggered to send an email notifications to the proxy to let him or her know about the revoked transactions (the delivered DA_PROXY_REVOKE generic template is used).

- If no other delegators delegated the proxy access to the same transaction code, the proxy's user profile is updated by de-provisioning the security role tied to the transaction code for which the proxy got his or her access revoked.

- If a transaction record was flagged by the PAV real-time process (the field SCC_DA_RLTM_UPD is set to 'Y' inside the SCC_DA_PRXY_TXN record), the PAV batch process completes the full validation process by triggering the Notifications framework to send an email notification to the proxy to let him or her know about the revoked transactions and determines if the proxy's user profile should be de-provisioned from the role listed inside the delegated transaction. Once terminated, the PAV batch logic sets the SCC_DA_RLTM_UPD field to 'N' so it doesn't get picked up again the next time the batch process is run.

See the "Using the Proxy Access Validation Batch Process" section for information on how to run this process.

Pages Used to Validate Proxy Access

Page Name	Definition Name	Navigation	Usage
Proxy Access Validation	SCC_DA_PAV_RUN_CNT	Campus Community, Delegated Access, Proxy Access Validation	Use a batch process to validate multiple transactions, delegator and proxy relationships in order to revoke access to delegated transactions.

Validating Proxy Access in Real Time

[Bundle 29. New]

The Proxy Access Validation process validates proxy access in real time when the

- Proxy accesses a delegated component.

- Delegator accesses the Share My Information component.

  See "Understanding Real Time Proxy Access Validation" in the Understanding Delegated Access section.

- Administrator accesses the Review Shared Information component.

  See Using the Review Shared Information Pages.

Validating Proxy Access in Batch

[Bundle 29. New]

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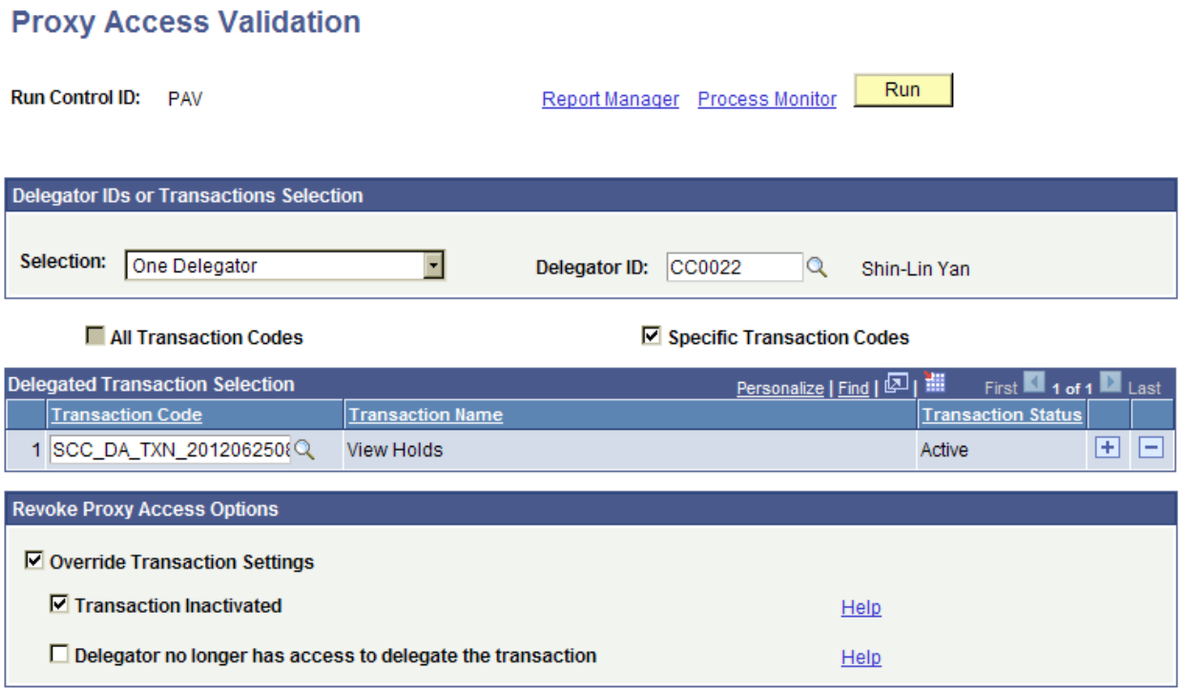
Access the Proxy Access Validation page (Campus Community, Delegated Access, Proxy Access Validation).



Proxy Access Validation page

The batch process evaluates whether the Transaction Status is set to Access Granted. It also evaluates the transactions that are flagged as Real-time Updates by the PAV real-time process. This is when the SCC_DA_RLTM_UPD field is set to 'Y' inside the SCC_DA_PRXY_TXN record.

When you run the batch process against one delegator or specific transactions, the PAV process evaluates *only* the transactions for the selected delegator or specified transaction codes. This means that transactions that have been updated during PAV real-time processing but *do not* belong to the selected delegator or transaction codes will not be processed.

Delegator IDs or Transactions Selection

Use this group box to select the transactions or delegator EMPLIDs to process.

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Selection	Select: • *All Transactions* to process all transaction codes for all delegator EMPLIDS who delegated transactions. When selected, All Transaction Codes checkbox is selected and disabled (you cannot specify a specific transaction code). • *All Delegators* to process all delegators. When selected, you can specify to process All Transaction Codes (the result of this setup is similar to selecting *All Transactions as* described above) or Specific Transaction Codes (both checkboxes are enabled). • *Specific Transactions* to select only specific transaction codes to process. When you select this option, the Specific Transaction Codes checkbox is checked and disabled, and the Delegated Transaction Selection grid appears so you can select which transaction codes you want to evaluate the proxies' access. • *One Delegator* to select a specific delegator to process. When you select this option, the Delegator ID field appears. Also, you must select whether all transaction codes or specific transaction codes should be processed for the delegator you choose.
Delegator ID	Select a delegator ID for which to run the batch process. The field prompt only returns EMPLIDs for existing Delegators. This field appears when you select One Delegator from the Selection list.
All Transaction Codes **Specific Transaction Codes**	Select to run the batch process for one or specific transaction codes. When one option is selected, the other one is disabled. When Specific Transaction Codes is selected, the Delegated Transaction Selection grid is displayed.

Delegated Transaction Selection

Use this grid to add one or more transaction codes for which to run the batch process.

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Revoke Proxy Access Options

Use this group box to override the transaction settings that you set up in the Delegation Transaction setup page.

Note: The option 'Never' is not applicable for PAV when run in batch.

See Configuring Delegation Transactions.

Configuring Delegation Transactions

This section discusses how to:

- Configure delegation transactions.
- Review delivered delegation transactions.

Warning! Prior to setting up the Delegation Transaction Setup page, you need to have identified the components you want to make available for delegation, created the menus, set up the appropriate permission lists, roles and optionally CTM Transaction Code. Refer to the "Step 5: Setting Up Components for Delegated Access" subsection. The setup for Delegated Access must be performed by a security administrator familiar with the Campus Solutions self-service components, the PeopleSoft security, and how you manage your security.

Page Used to Configure Delegation Transactions

Page Name	Definition Name	Navigation	Usage
Counter Setup	SCC_AWS_FIX_CTRS	Set Up SACR, System Administration, Utilities, Constituent Transaction Mgmnt, Counter Setup	Set up the max ID number for the next created proxy ID. Proxy ID is created when a delegator delegates access to a new contact in the Share My Information component. This value is used programmatically and not visible in pages. **See** *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*, Working with Constituent Transaction Management, Setting Up CTM, "Setting Up Counter". An updated version of the Working with Constituent Transaction Management

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			chapter was released as part of the Campus Community Bundle 29 documentation updates.
Delegation Transaction Setup	SCC_DA_SETUP	Set Up SACR, System Administration, Utilities, Delegated Access, Delegation Transaction Setup	Configure transactions for delegation.

Configuring Delegation Transactions

Access the Delegation Transaction Setup page (Set Up SACR, System Administration, Utilities, Delegated Access, Delegation Transaction Setup).

[Bundle 29. New group box: Revoke Proxy Access Options]

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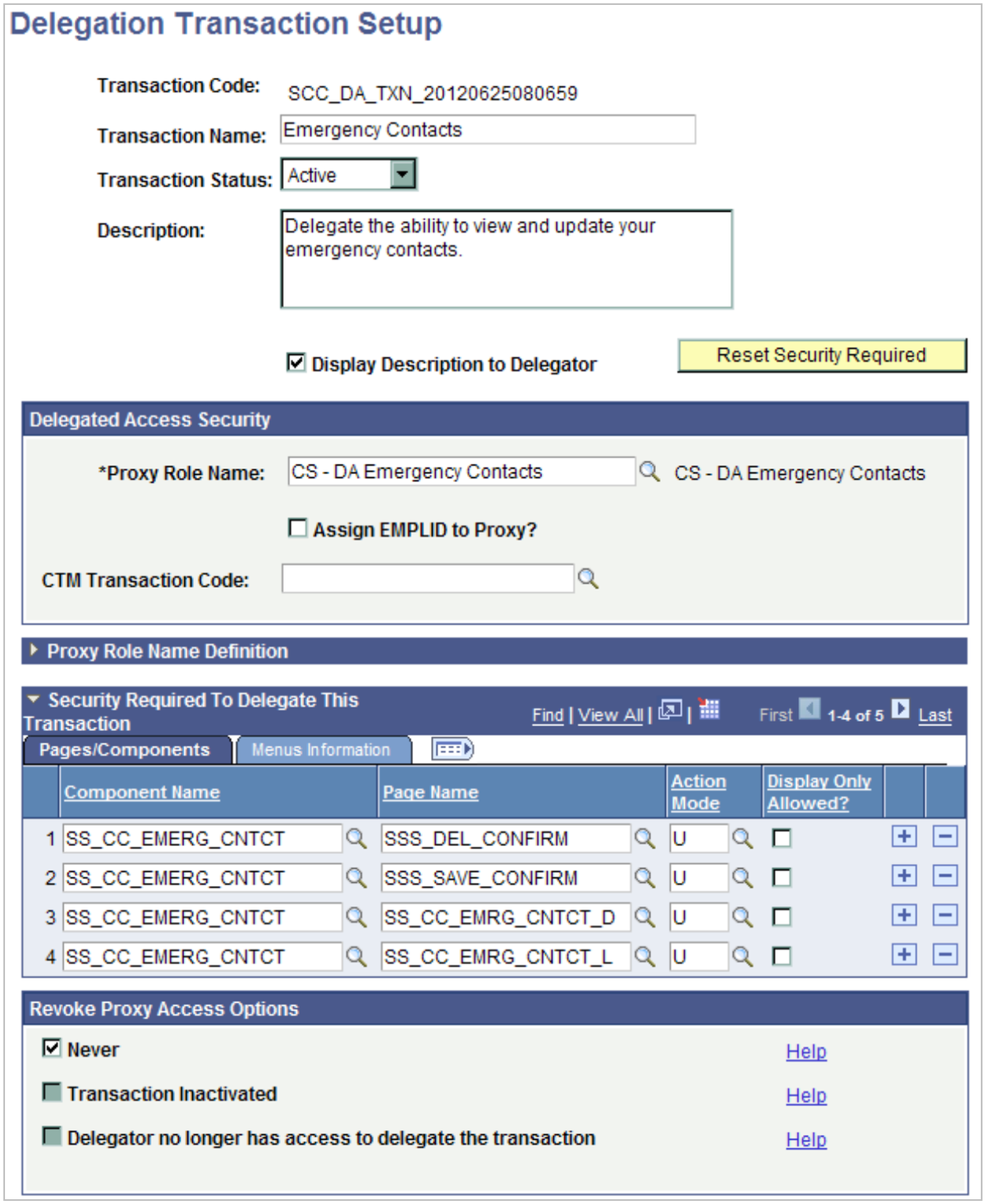

Delegation Transaction Setup page

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Delegation Transaction Setup

Transaction Code: SCC_DA_TXN_20120625080659

Transaction Name: Emergency Contacts

Transaction Status: Active

Description: Delegate the ability to view and update your emergency contacts.

☑ Display Description to Delegator

Reset Security Required

Delegated Access Security

*Proxy Role Name: CS - DA Emergency Contacts — CS - DA Emergency Contacts

☐ Assign EMPLID to Proxy?

CTM Transaction Code: DELEGATED_ACCESS

Proxy Role Name Definition — Personalize | Find | View 4 | First 1-5 of 5 Last

Pages/Components | Menus Information

	Component Name	Page Name
1	SS_CC_EMERG_CNTCT	SSS_DEL_CONFIRM
2	SS_CC_EMERG_CNTCT	SSS_SAVE_CONFIRM
3	SS_CC_EMERG_CNTCT	SS_CC_EMRG_CNTCT_D
4	SS_CC_EMERG_CNTCT	SS_CC_EMRG_CNTCT_L
5	SS_CC_EMERG_CNTCT	SS_CC_PRIM_CONTACT

Security Required To Delegate This Transaction — Find | View 4 | First 1-5 of 5 Last

Pages/Components | Menus Information

	Component Name	Page Name	Action Mode	Display Only Allowed?
1	SS_CC_EMERG_CNTCT	SSS_DEL_CONFIRM	U	☐
2	SS_CC_EMERG_CNTCT	SSS_SAVE_CONFIRM	U	☐
3	SS_CC_EMERG_CNTCT	SS_CC_EMRG_CNTCT_D	U	☐
4	SS_CC_EMERG_CNTCT	SS_CC_EMRG_CNTCT_L	U	☐
5	SS_CC_EMERG_CNTCT	SS_CC_PRIM_CONTACT	U	☐

Delegation Transaction Setup page (with the Pages/Components tab selected in the grids)

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Delegation Transaction Setup

Transaction Code: SCC_DA_TXN_20120625080659

Transaction Name: Emergency Contacts

Transaction Status: Active

Description: Delegate the ability to view and update your emergency contacts.

☑ Display Description to Delegator

Reset Security Required

Delegated Access Security

*Proxy Role Name: CS - DA Emergency Contacts — CS - DA Emergency Contacts

☐ Assign EMPLID to Proxy?

CTM Transaction Code: DELEGATED_ACCESS

Proxy Role Name Definition — Personalize | Find | View 4 | First 1-5 of 5 Last

Pages/Components | Menus Information

	Menu Name	Menu Bar Name	Menu Item Name
1	SCC_DA_SS_EMRCNCT	EMERGENCY_CONTACT	SS_CC_EMERG_CNTCT
2	SCC_DA_SS_EMRCNCT	EMERGENCY_CONTACT	SS_CC_EMERG_CNTCT
3	SCC_DA_SS_EMRCNCT	EMERGENCY_CONTACT	SS_CC_EMERG_CNTCT
4	SCC_DA_SS_EMRCNCT	EMERGENCY_CONTACT	SS_CC_EMERG_CNTCT
5	SCC_DA_SS_EMRCNCT	EMERGENCY_CONTACT	SS_CC_EMERG_CNTCT

Security Required To Delegate This Transaction — Find | View 4 | First 1-5 of 5 Last

Pages/Components | Menus Information

	Menu Name	Menu Bar Name	Menu Item Name
1	CC_PORTFOLIO	TASKS	SS_EMERGENCY_CNTCT
2	CC_PORTFOLIO	TASKS	SS_EMERGENCY_CNTCT
3	CC_PORTFOLIO	TASKS	SS_EMERGENCY_CNTCT
4	CC_PORTFOLIO	TASKS	SS_EMERGENCY_CNTCT
5	CC_PORTFOLIO	TASKS	SS_EMERGENCY_CNTCT

Delegation Transaction Setup page (with Menus Information tab selected in the grids)

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Transaction Code	Displays the auto-generated unique ID. When you add a new delegation transaction, this field displays the value *NOID* until you save the record. When you save the new delegation transaction, the field displays a unique ID that the system assigned to the delegation transaction.
Transaction Name	Enter the name of the transaction. This name will appear on the Share My Information - Details self-service page where a delegator can select the transaction names he or she wants to delegate. It is strongly recommended that you always assign a meaningful transaction name because the self-service users will see it.
Transaction Status	Activate or inactivate the delegation transaction. When inactivated, the transaction name is no longer displayed in the Share My Information - Details self-service page even if the user has access to delegate it. Note: If you inactivate a transaction, you may want to revoke access to the proxies that have already been delegated access to it, To do so, inside the Revoke Proxy Access Options group box, select *Transaction Inactivated*. The next time a proxy attempts to access a component included inside the inactivated transaction, the Proxy Access Validation real-time logic will automatically revoke the proxy access. The same can also be done by batch using the Proxy Access Validation process. See “Using Proxy Access Validation” in the Understanding Delegated Access section.
Description and **Display Description to Delegator**	Enter a description of the components that the transaction contains or what the transaction is used for. Select the Display Description to Delegator check box to display this description on the Share My Information - Details self-service page where a delegator can select the transaction he or she wants to delegate.
Reset Security Required	Click to reset the information entered in the Security Required To Delegate This Transaction grid. The fields in this grid will be populated by default using the information defined in the Proxy Role Name you select.

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Delegated Access Security

Use this group box to establish security access for proxies who are delegated access to the given transaction and decide if an EMPLID should be assigned to the proxy.

Proxy Role Name

Select the security role that will be provisioned to the proxy's user profile once the proxy has accepted the terms and conditions for accessing a specific delegator's data. The selected role must contain security information that is only relevant for the transaction created. For example, if the transaction is to delegate access to a single component, for example the *Emergency Contacts* component, the selected role must only include a permission list that contains the *Emergency Contacts* component. You can quickly validate all the components included in the selected role by expanding the Proxy Role Name Definition collapsible grid.

If instead you create a transaction that should grant access to multiple components (for example *Update Contact Information*), the role you select will need to include the collections of components you want to grant access as part of this transaction. For example, the role could grant access to the Email Addresses, Phones, Addresses, Languages, Names components.

When a proxy's delegated access is revoked, (assuming the proxy has accepted the terms and conditions and therefore has been identified), the system deletes this role from the proxy's user profile. Thus, the proxy no longer has access to the transaction component.

Note: If there are other delegators that delegated the proxy access to the same transaction, the role is not deleted since the proxy still needs it to access the other delegators' data. However, since the transaction will have a status of *Revoked*, the proxy will not be able to access the delegator's data that has been revoked.

This field prompts from roles set up in the Roles component.

Assign EMPLID to Proxy?

Select if you want the CTM framework to assign an EMPLID to the proxy. Refer to the previous section *CTM and Delegated Access* for information about the implications of this setting. When selected, you are required to enter a CTM Transaction Code.

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CTM Transaction Code

Specify the CTM transaction code that the system will use to store the proxy's constituent data that the proxy enters on the Proxy Terms and Conditions page.

If the Assign EMPLID to Proxy check box is selected, the system uses this CTM transaction code to trigger Search/Match and assign an EMPLID to the proxy.

The prompt only returns the CTM transaction codes that are set up with partition data *By Constituent*. This is because Delegated Access framework does not involve any transaction data.

Proxy Role Name Definition

When you select the Proxy Role Name value, this grid automatically displays the components, associated pages, and menus included in the selected role. This information is to show you what the proxy will be granted access to, after being delegated access to the transaction. Use this grid to confirm that the right role is selected for the transaction you are creating.

Security Required To Delegate This Transaction

When you select the Proxy Role Name value, by default, the system automatically populates this grid with the components, associated pages, and menus included in the selected role.

You can edit the fields in this grid. A delegator's user profile must have access to all the components, pages, action modes and menus listed in this grid in order to be eligible to delegate the transaction and see the transaction name on the *Share My Information - Details page*. What you define here is basically *who* has access to delegate this transaction.

In most cases the delegator will need to have access to the same components and page names listed in the proxy role. However the menus or the action modes may differ. For example, a student that has access to the Names self-service component in *display only* mode, should not be able to delegate access to the Names self-service component in *update display* mode (in most cases, if the student doesn't have access to update some data, the parents should also not have access to update the data).

Because all the components made available for delegation, previously needs to be added to a DA Menu (Refer to the "Step 5: Setting Up Components for Delegated Access" subsection), the delegator will not have access to that menu. For example, the screen shot above shows that the *Emergency Contacts* component was added to the SCC_DA_SS_EMRCNCT menu in the proxy role name. The delegator (the student) will not have access to this menu. Instead he or she will have access to the CC_PORTFOLIO menu.

Use this grid also if your institution has created a "*parent* version" of a *student* self-service component. For example, if you created a parent version of the *View My Class Schedule* component, the student will *not* have access to it. The student will have access to the student version. In this case make sure the proxy role contains the parent version of the component and in the Security Required To Delegate This Transaction grid, you select the component name and other information for the student version.

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Note: If you leave the grid empty, then no security is required to delegate the transaction. All users can delegate it.

Warning! Setting up the delegator's required security to delegate a transaction requires strong knowledge of the PeopleTools security management (Roles, Permission List, Menus, Components, Pages, and Action Modes). It also requires a good understanding of how your system's security is configured.

Component Name	Enter the name of the component(s) the delegator should have security access to, in order to be eligible to delegate the transaction name.
Page Name	Enter the name of the associated page(s) the delegator should have security access to, in order to be eligible to delegate the transaction name.
Action Mode	Enter the action mode in which you want to check for delegator security access. The action mode entered here will be considered while checking if the delegator has security access to the page with the same action mode. If the delegator does not have security access to the page with the action mode entered, the transaction cannot be delegated. **Note:** When action mode(s) is given in a permission list, the value(s) selected applies to all pages in a same component. The action mode you select here for a page will therefore be defaulted for the other pages included in the same component.

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Display Only Allowed

Use this checkbox to indicate whether the delegator is allowed to have access to the pages contained in the Proxy Role Name selected in display only mode or not in order to be eligible to delegate the transaction name. This check box prevents a user that has only display only access to certain pages to delegate a transaction that grants a proxy access to update the data.

Within PeopleTools security, the permission list contains pages and for each of them you can decide if the user should have access to the page in display only mode or not. In other words if the user will be allowed to view the page or to view and update the page.

Suppose the Proxy Role Name selected contains permission lists that grant access to pages in *display only* mode (see the sample transaction delivered with your system called *View Contact Information*). In most cases you would want to allow delegators with *display only* and any other modes to delegate this transaction. In this case you would select the Display Only Allowed check box because having display only access should be permitted to delegate this transaction.

If instead the Proxy Role Name selected contains permission lists that grant access to pages in update/display mode (see the sample transactions delivered with your system called *Update Contact Information* and *Emergency Contacts*). In this case you will probably not want to allow delegators that only have *display only* access to delegate the transaction. In this case you will not allow display only and therefore will not check the Display Only Allow check box.

For example, a student that has access to the Names self-service component in *display only* mode, should not be able to delegate access to the Names self-service component in *update display* mode (in most cases, if the student doesn't have access to update some pages, the parents should also not have access to update the data).

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	Recommendations: If the Proxy Role Name selected grants access to pages in update mode (the Display Only flag for the page names is unchecked inside the permission list included in the role), then you may *not* want the delegators who have access to the page in display only mode should be able to delegate this page's access. In this case, do not select the Display Only Allowed check box. If the Proxy Role Name selected grants access to pages in display only mode (the Display Only flag for the page names is checked inside the permission list), or if the nature of the pages only shows data (no value can be updated or selected in the page) then you may want that the delegators who have access to the page in display only mode should be able to delegate access to this page. In this case, select the Display Only Allowed check box. **See** PeopleTools PeopleBooks for more information on how permission lists are created and how pages are marked as display only.
Menu Name, Menu Bar Name and **Menu Item Name**	Enter the name of the menu(s) the delegator should have security access to, in order to be eligible to delegate the transaction name.

Revoke Proxy Access Options

[Bundle 29. New]

The Revoke Proxy Access Options group box allows an institution to decide which conditions to use to revoke a proxy's access at the transaction level. This is used by the Proxy Access Validation real time and batch logic.

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Never	By default, this check box is disabled. If you enable this option, the other options are disabled. When selected, the Proxy Access Validation logic never revokes the proxy access to the transaction. Use this option for transactions containing components that are generic or do not grant access to sensitive data. **Warning!** When you select this check box and the delegator loses security access to the transaction, the proxy continues to have access to the transaction. The delegator will not be able to revoke proxy access. Only an administrative user can revoke access to the transaction through the Review Shared Information component.
Transaction Inactivated	By default, this check box is enabled. This option indicates that when the transaction status is set to Inactive, the proxies would no longer have access to it. Delegators and administrators will be unable to delegate a transaction that is inactive. Inactive transactions do not appear in the Share My Information – Details component and in the Review Shared Information – Details. When this option is selected, proxies with previous access to the transaction will see their access revoked. **Note**: When a transaction is set to Inactive, this does *not* immediately revoke a proxy's access to the transaction. Proxy access is revoked at the time the Proxy Access Validation process is run (real time or by batch).

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Delegator no longer has access to delegate the transaction

By default, this check box is enabled.

In most cases, when a delegator loses access to a transaction, the proxy also should lose access to it. This ensures that the delegator controls what a proxy has access to.

For example, a student has delegated his parent access to his Addresses information. If the student looses access to the Addresses component, by selecting this option, his parent will also no longer be able to access it.

Note: The proxy access is revoked at the time the Proxy Access Validation process is run (real time or by batch).

See also “Revoking Proxy Access” in the Understanding Delegated Access, Using Proxy Access Validation section.

Reviewing Delivered Delegation Transactions

PeopleSoft delivers few transactions that are preconfigured for the Delegated Access framework and accessible through the Delegation Transaction Setup page. The transactions are meant to be used as samples only and are delivered with a status of *Inactive*.

This table lists the delivered delegation transactions and their configuration:

Transaction Name / Transaction Code	**Delegation Transaction Description**	**Unique Role / Permission List**	**Component Name**	**Unique Menu Name / Search Record Override**
View Contact Information / SCC_DA_TXN_20120626014905	Delegate the ability to view your phone numbers, email addresses and addresses.	CS - DA Contact Info View / HCCPCSSA1140: CS - DA Contact Info View Note: Pages included in the permission list are defined with Display	SS_CC_PERS_PHONE SS_CC_EMAIL_ADDR SS_CC_ADDRESSES Note: This sample shows that a collection of components can be delegated as part of	SCC_DA_ADDR_VW / SCC_DA_SRCH_VW

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		Only = Y. That way the proxy will only be able to view the delegator's data.	a same transaction.	
Update Contact Information / SCC_DA_TXN_20120625080419 Note: This transaction is similar to the "View Contact Information" transaction and contains the same collection of components, but is set up to allow proxies to update the contact information.	Delegate the ability to update your phone numbers, email addresses and addresses.	CS - DA Contact Info Update / HCCPCSSA1141: CS - DA Contact Info Update Note: Pages included in the permission list are defined with Display Only = N. That way the proxy will be able to update the delegator's data.	SS_CC_PERS_PHONE SS_CC_EMAIL_ADDR SS_CC_ADDRESSES Note: This sample shows that a collection of components can be delegated as part of a same transaction.	SCC_DA_SS_ADDRESS / SCC_DA_SRCH_VW
Emergency Contacts / SCC_DA_TXN_20120625080659	Delegate the ability to view and update your emergency contacts.	CS - DA Emergency Contacts / HCCPCSSA1150: CS - DA Emergency Contacts	SS_CC_EMERG_CNTCT	SCC_DA_SS_EMRCNCT / SCC_DA_SRCH_VW
View To Do List / SCC_DA_TXN_20120625080459	Delegate the ability to view the pending items on your to do list generated by the institution.	CS - DA To Do List / HCCPCSSA1160: CS - DA To Do List	SS_CC_TODOS	SCC_DA_SS_TO_DO / SCC_DA_SRCH_VW

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View Holds / SCC_DA_TXN_20120625080559	Delegate the ability to view the holds placed on your record for specific services.	CS - DA Holds / HCCPCSSA1170: CS - DA Holds	SS_CC_HOLDS	SCC_DA_SS_HOLDS / SCC_DA_SRCH_VW

Warning! The delivered sample transactions are configured using the delivered self-service components. These components were originally intended to be used by the person to whom the data belongs to. You may want to modify these components or create a "proxy" version so that they make better sense for a proxy.

Using the Review Shared Information Pages

[Bundle 29. New]

This section describes how to:

- Use the Review Shared Information – Summary page
- Use the Review Shared Information – Details page

Pages Used to Access the Review Shared Information Pages

Page Name	Definition Name	Navigation	Usage
Review Shared Information – Summary	SCC_DA_RVEW_SUMM	Campus Community, Delegated Access, Review Shared Information	Use to view delegation information such as proxy information, delegated transactions, and transaction status. Administrators can also use this page to delete a proxy on behalf of a delegator.
Review Shared Information – Details	SCC_DA_RVEW_DTL	Click the Edit button on the Review Shared Information – Summary page	Use this page to view or update proxy information. Administrator can also use this page to grant or revoke the proxy access to delegation transactions.

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Using the Review Shared Information – Summary Page

[Bundle 29. New]

Access the Review Shared Information – Summary page (Campus Community, Delegated Access, Review Shared Information).

Review Shared Information - Summary

Marie Fletcher 0068

John Fletcher — Edit Delete

Contact Information

Contact Name	Contact Email Address	Relationship	Contact Status
John Fletcher	jfltecher@yahoo.com	Father	Accepted

Shared Transactions

Shared Access	Start Date	Transaction Status
Update Contact Information	15/04/2013	Access Granted
Emergency Contacts	15/04/2013	Access Granted

Susan Smith — Edit Delete

Contact Information

Contact Name	Contact Email Address	Relationship	Contact Status
Susan Smith	ssmith@yahoo.com	Mother	Unknown

Shared Transactions

Shared Access	Start Date	Transaction Status
View Holds	15/04/2013	Submitted
Emergency Contacts	15/04/2013	Submitted

Review Shared Information – Summary page

Use the Summary page to view the same delegation information a delegator sees in the Share My Information – Summary page.

From this page, administrators can:

- View proxy information for all proxies with delegated access to a delegator's data
- View the current transactions that are delegated to each proxy
- View the transaction status
- Delete a proxy on behalf of the delegator

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Note: The administrative component does not allow an administrator to create a new proxy on behalf of the delegator. This page allows administrators to *only* update information on existing proxies.

When administrators access this component, the PAV process runs in real time to determine whether a proxy should have access to delegated components. This gives an accurate picture of who has access to what.

Warning! Granting security access to the Review Shared Information component should be done with care. Since the component allows granting a third party (a proxy) security access to someone's data (a delegator), it may violate your data privacy rules. Consider granting security access to the component in *display only* to your regular administrators, and to full edit to your administrative super users.

Edit	Click to access the Review Shared Information – Details page. From this page, you can execute more actions on behalf of a delegator.
Delete	Click to delete the proxy on behalf of the delegator. When you do so, all the transactions delegated to the proxy are automatically revoked, and the proxy will no longer be displayed on the Summary page. The Notifications framework is triggered and an email message is sent to the proxy to inform him or her about the revoked access. If the proxy's user ID is known and no other delegator delegated him or her access to the security role tied to the revoked transaction, the proxy's user profile is removed from the security role. **Note:** This button is disabled when the administrator has display-only security access to this component.

Using the Review Shared Information – Details Page

[Bundle 29. New]

Click the Edit button in the Review Shared Information – Summary page.

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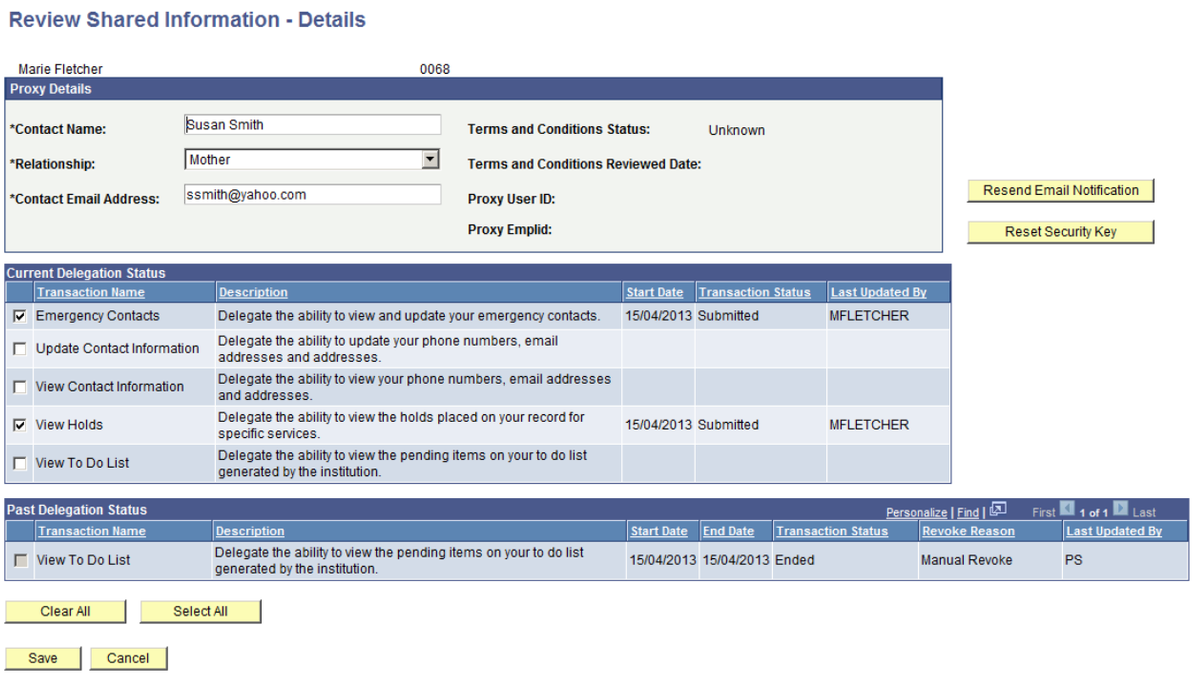

Review Shared Information – Details page

Proxy Details

Administrators use this page to view and update the proxy's information. The contact email address listed is the email address used to send notifications to the proxy when transactions are granted or revoked. If necessary, the delegator could change this information using the Share My Information – Details page, but it can also be done by an administrator. This group box also gives the administrator information on whether the proxy has accepted the terms and conditions to access the delegator's data. The values are 'Unknown' (proxy has not accepted or declined the terms and conditions), 'Accepted' or 'Declined'. Once accepted or declined, the Terms and Conditions Reviewed Date is populated with the date the proxy has accepted or declined the terms and conditions. The Proxy User ID field is only populated once the proxy has accepted or declined the terms and conditions. Only at that time is the proxy associated with the delegator's EMPLID. The Proxy EMPLID field is populated only after the proxy has accepted or declined the terms and conditions *and* at least one of the delegated transactions was set up to assign an EMPLID to the proxy. If not, the field remains blank.

Resend Email Notification Click to resend the last email notification sent to either the proxy or delegator.

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Reset Security Key	Click to reset the security key for the proxy. Use this to reset the security key that was generated when the proxy was created. If the proxy is unable to accept the Terms and Conditions because of a security key error, you can generate a new security key. **See** Delegated Access Validation in the Understanding Delegated Access section for more information about using the security key.
Clear All / Select All	Deselects or selects all transactions in the Current Delegation Status and Past Delegation Status grids.

Current Delegation Status

This group box is dynamic and only displays the transactions that a delegator has access to. On behalf of the delegator, the administrator can delegate new transactions to an existing proxy and revoke access to certain transactions. To delegate or revoke transactions, select or deselect the appropriate check box for the transaction.

The grid displays the Transaction Status as well as who made the latest update.

Note: The administrator can only delegate transactions for which the delegator has access to. This is why the grid limits the list of transactions. Who has access to delegate a transaction is defined in the Delegation Transaction Setup page (in the Security Required to Delegate this Transaction group box).

Past Delegation Status

This group box displays the transactions that a proxy previously had access to. In most cases the transactions listed in the grid will be disabled and will have a Transaction Status of *Ended* (or *Revoked* in the record). The Revoke Reason field is populated with proper information. This is the only place where the Revoke Reason is displayed.

See “Revoking Proxy Access” in Understanding Delegated Access, Using Proxy Access Validation section for information on the revoke reason values.

The grid also displays the transactions for which the delegator no longer has access to delegate, but for which the proxy still has access to. This happens when a transaction was set with the option to never revoke the proxy access and the delegator later lost security access to it. If a proxy had access to a transaction set as such, the grid will display the transaction with the checkbox selected, and will allow the administrator to revoke it. The delegator, because he or she no longer has access to that transaction, will not see it in the Share My Information self-service component, and will be unable to manually revoke the proxy’s access to it. In this case, only an administrator can revoke the proxy’s access. The following image shows an example of how the Past Delegation Status grid will look like with a transaction that has been set with the option to *Never* revoke a proxy access and the delegator lost access to the transaction after delegating it to the proxy.

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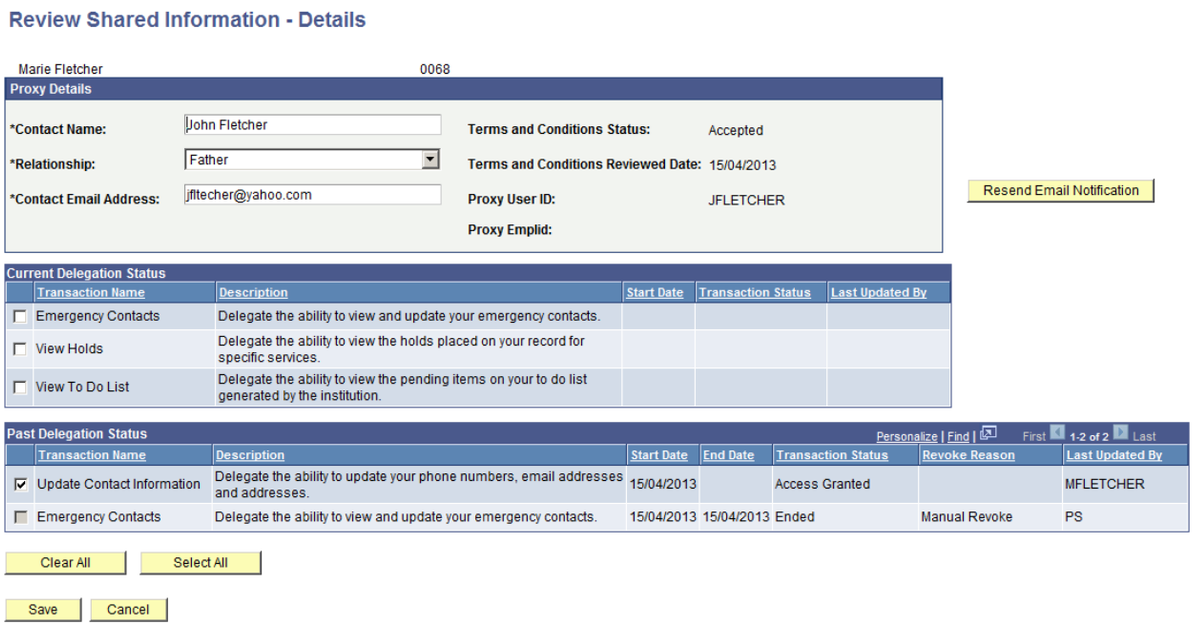

Review Shared Information – Details page when the Past Delegation Status grid shows a transaction that the delegator no longer has access to delegate, but for which the proxy still has access.

See Configuring Delegation Transactions.

When an administrator uses the Details page to:

- Change the email address, the Confirm Email Address field is enabled. The administrator must also provide the new email address in the Confirm Email Address field.
- Revoke the proxy's access to a delegated transaction, a warning message appears and asks if the administrator wants to revoke access to the delegated transaction. If the administrator clicks OK, the Notifications framework is triggered and an email notification is sent to the proxy about the change (the DA_PROXY_REVOKE template is used).
- Delegate a transaction on behalf of the delegator, a warning message appears and asks if the administrator wants to delegate access to the transaction. If the administrator clicks OK, the Notifications framework is triggered, and email notifications are sent to the delegator and proxy about the change (the DA_DELEGATOR_GRANT or the DA_KNOWN_PROXY_GRANT templates are used).

Developer Reference for Setting Up Delegated Access

Take advantage of the Delegated Access framework to create your own delegation transactions.

Warning! Some steps to configure Delegated Access require a technical effort and require knowledge of Application Designer, web services, Integration Broker, Entity Registry and how you manage user security access at your institution.

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This section discusses:

- Step 1: Setting up counter for proxy ID.
- Step 2: Defining the delegator's terms and conditions message catalog.
- Step 3: Defining the proxy's terms and conditions message catalog.
- Step 4: Setting up the CTM transaction for delegated access (optional).
- Step 5: Setting up components for delegated access.
- Step 6: Setting up permission lists and roles for the delegated access components.
- Step 7: Setting up the delegation transactions.
- Step 8: Modifying the Proxy Terms and Conditions page to include proper constituent fields.
- Step 9: Setting up the URL contained in the proxy email notification to access New User Registration login page.
- Step 10: Setting up New User Registration framework.
- Step 11: Modifying the delegated access notification templates.
- Step 12: Configuring your system for sending email messages through Notifications framework.
- Step 13: Activating the SCC_DA web service.
- Step 14: Verifying that the request handler exists.

Step 1: Setting Up Counter for Proxy ID

The Delegated Access framework assigns a unique proxy ID number (which is not EMPLID or User ID) every time a delegator creates a new proxy (new contact) in the *Share My Information* component. To view the latest proxy ID assigned or to enter the next proxy ID that you want the system to assign when the system automatically generates proxy IDs, use the Counter Setup page (Set Up SACR, System Administration, Utilities, Counter Setup). The proxy ID value is only used for processing purposes and therefore never displayed.

See the Working with Constituent Transaction Management chapter in the Campus Community PeopleBook for bundle 29 for more information about the Counter Setup page.

Step 2: Defining the Delegator's Terms and Conditions Message Catalog

The delegator's terms and conditions are displayed on the Share My Information -Terms and Conditions page (SS_CC_DA_DELEG_AGR page). Modify the message catalog number 14025, 60 to display your institution specific terms and conditions. Each time a delegator creates a new proxy, the delegator must

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first accept the institution's terms and conditions. For example, academic institutions in the United States can display their terms and conditions on this page to comply with the data privacy regulations under FERPA.

Step 3: Defining the Proxy's Terms and Conditions Message Catalog

The proxy's terms and conditions are displayed on the Proxy Terms and Conditions page. Modify the message catalog number 14025, 1 to display your institution's terms and conditions that you want the proxy to accept prior to start viewing the delegator's data.

Step 4: Setting Up the CTM Transaction for Delegated Access (Optional)

Access the Transaction Setup page (Set Up SACR, System Administration, Utilities, Constituent Transaction Mgmt, Transaction Setup).

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Transaction Setup | Search/Match Setup

Transaction: DELEGATE_ACCESS

*Transaction Name: Delegated Access

Transaction Description: Generic CTM transaction used by Delegated Access framework to assign an EMPLID to the proxies.

*Transaction Status: Active

*Data Update Rule: DEFAULT_UPDATE_RULE

Transaction Options

☑ Online Transaction

Process Search/Match: ○ Batch ◉ Realtime ☐ Run on Save

Transaction Handler

*Root Package ID: SCC_CTM

*Path: TRANSACTION

*Application Class ID: DefaultTransaction

Transaction Status and Date

*Staged Record Name: SCC_DFLT_TRANS Default Transaction Status rec

Constituent Handler

*Root Package ID: SCC_SL_TRANSACTION

*Path: INTFC

*Application Class ID: DefaultConstituent

Partition Data

◉ By Constituent ○ By Transaction

Transaction Data Launch View

Menu Name:

Menu Bar Name:

Menu Item Name:

Menu Page Name:

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Example of a Transaction Setup page for generic Delegated Access use

Each of the delegation transactions you create can be associated with a CTM Transaction Code. Consider reusing the same CTM Transaction Code. You will want to use different values mostly only if a delegation transaction code requires a different Search/Match configuration or you want to use a different Data Update Rule configuration. Oracle recommends associating a delegation transaction with a CTM Transaction Code only if you want to assign an EMPLID to the proxy.

The following is the recommendation for configuring a CTM transaction for delegated access:

Transaction Options

Field/Option	Configuration
Online Transaction	Select this check box because the Delegated Access business process is performed through self-service pages.
Process Search/Match (The system uses the Process Search/Match setting only if Assign EMPLID to Proxy is selected).	Select *Batch* if you want to assign EMPLIDs at a later time and process many proxy data at once or the *Realtime* option if you want to process the proxy data immediately after the proxy submits the Proxy Terms and Conditions page. In this case, deselect the Run on Save check box because Delegated Access only supports triggering CTM on Submit (proxy can only submit the Proxy Terms and Conditions page).

Transaction Handler

Field/Option	Configuration
Root Package ID	Select *SCC_CTM*.
Path	Select *TRANSACTION*.
Application Class ID	Select *DefaultTransaction*.
Staged Record Name	Select *SCC_DFLT_TRANS*.

The SCC_CTM.TRANSACTION.DefaultTransaction class allows for processing CTM transactions that use only constituent data and do not use any transaction-specific data. Delegated Access does not involve any transaction-specific data.

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Constituent Handler

Field/Option	Configuration
Root Package ID	Select *SCC_SL_TRANSACTION*.
Path	Select *INTFC*.
Application Class ID	Select *DefaultConstituent*.

Partition Data

Field/Option	Configuration
By Constituent	Select this option (the Delegated Access framework does not use transaction data).

Transaction Data Launch Parameters

The fields in this region should be left blank because there is no transaction-specific data with delegated access and therefore there is no transaction staging component for the administrative user.

Note: Set the Search/Match Setup page using the configuration of your choice.

See the Working with Constituent Transaction Management chapter in the Campus Community PeopleBook for bundle 29 for more information about the Transaction Setup and Search/Match Setup pages.

See CTM and Delegated Access in the Understanding Delegated Access section.

Step 5: Setting Up Components for Delegated Access

To enable a Campus Solutions component for delegated access, these steps are required:

1. Determine which components should be enabled for delegated access.

   Evaluate your self-service components and identify the ones you would like to make available for a proxy to look at or to make any updates on behalf of the delegator (for example, the delegator can be a student).

2. Determine if a proxy version of these components should be created. If so, these proxy components should be used in the subsequent steps.

   The delivered Campus Solutions self-service components are intended to be used by the person who owns the data. For example the self-service page where a user can enter email addresses mentions "*Enter your email addresses below*". If a proxy accesses this page, the text might be

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confusing since it is not the proxy's email addresses that should be entered, but the delegator's email addresses. In this case you may want to consider creating a "proxy" version of this self-service component. The same is true if you want to hide some information. For example, it might make sense to display some information to a student, but may be not to a proxy.

3. Create a menu (DA Menu) for each of the components you identified above to delegate to a proxy. A menu can include one or more components related to a specific transaction.

   The menu you create will be used to allow overriding the original component search record and also to make the security to delegate more granular. Each menu created can later be added to a single permission list.

   You can create one menu for one component. For example, delivered with your system is a sample delegated transaction called *Emergency Contacts*. It only contains the emergency contacts self-service component called SS_CC_EMERG_CNTCT. This component is added to a new menu named SCC_DA_SS_EMRCNCT.

   You can also create one menu for multiple components. For example, delivered with your system is a sample delegated transaction called *Update Contact Information*. It contains the email address self-service component (SS_CC_EMAIL_ADDR), the phone self-service component (SS_CC_PERS_PHONE) and the addresses self-service component (SS_CC_ADDRESSES). These components were added to a new menu named SCC_DA_SS_ADDRESS.

4. Create a menu search record override.

   If you make a delivered Campus Solutions self-service component available for Delegated Access, the search record needs to be overridden. In fact, the component search record only returns the EMPLID for the person that is signed into your system (again, Campus Solutions self-service components display the information of the person that is signed into your system). When a proxy accesses one of these components, the search record used should return the list of delegators that granted him or her access to the component and for which the delegation status is *Access Granted* (not *Revoked*).

   Delivered with your system is a search record called SCC_DA_SRCH_VW. This search record should be added to the menus you created in the previous step. This search record overrides the component search record.

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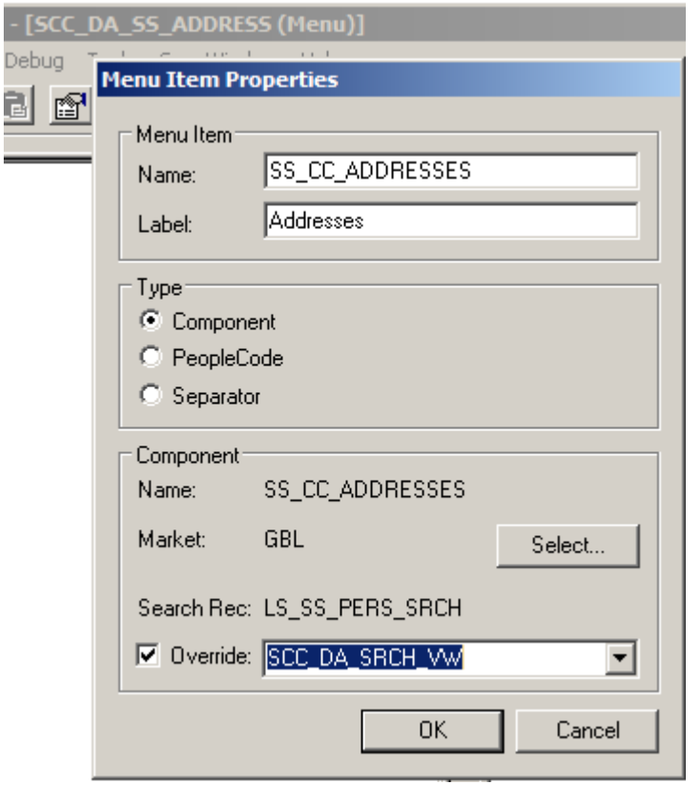

Example of the SCC_DA_SS_ADDRESS menu item properties showing how to override the component search record

When a proxy accesses one of the components he or she has been delegated, only the delegator names are returned.

For example, Joe, Jane and Jack are siblings attending the same school. Joe and Jane granted their mother Mary Smith access to their Emergency Contacts data. Jack granted his mother access to a different component. When the mother accepts the terms and conditions for each of her three kids, her User ID gets tied to Joe, Jane and Jack's EMPLIDs. When she navigates to the Emergency Contacts component (through the DA Menus), she sees a search record that returns only the names of her kids who granted her access to the component: Joe and Jane. Jack's name is not listed because he did not grant his mother access to that component.

Because we are using a DA Menu, if Mary was also a student at the institution, she wouldn't see her own Emergency Contacts data from that navigation. To see her own data she will still need to navigate to the regular Self Service, Campus Personal Information, Emergency Contacts component.

The Delegated Access search record returns the delegators that delegated the component access to the proxy and where the proxy has previously accepted the terms and conditions. Once a delegated transaction is revoked by a delegator, the proxy will no longer see that delegator's name inside the search record.

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[Bundle 29. Added information about proxy access validation.]

The logic for the Proxy Access Validation engine, when triggered in real time by the proxy, is also contained inside the Delegated Access search record.

See Understanding Proxy Access Validation.

Note: The delivered Delegated Access search record SCC_DA_SRCH_VW returns the delegator's names only. The system does not return their EMPLIDs to avoid giving unnecessary information to the proxy.

Note: If you created a proxy version of a student self-service component, the search record SCC_DA_SRCH_VW can be added directly to the component you created.

See *PeopleTools PeopleBook: PeopleSoft Application Designer Developer's Guide* for more information on how a menu is created.

5. Create a content reference to access the menu through portal navigation.

   Each of the DA Menu/component combinations created above must be added to its own content reference. For example, the SCC_DA_SS_ADDRESS menu (along with each of its three components) was added to the "Update Address", "Update Email Address" and "Update Phone" content references. Below is a representation of the sample components delivered with your system and how they were added into a specific content reference.

Content Reference Name	**Content Reference Label**	**Menu Name**	**Component Name**
HC_SCC_DA_ADDRESS_UPDATE	Update Address	SCC_DA_SS_ADDRESS	SS_CC_ADDRESSES
HC_SCC_DA_EMAIL_UPDATE	Update Email Address	SCC_DA_SS_ADDRESS	SS_CC_EMAIL_ADDR
HC_SCC_DA_PHONE_UPDATE	Update Phone	SCC_DA_SS_ADDRESS	SS_CC_PERS_PHONE
HC_SCC_DA_ADDR_VIEW	View Address	SCC_DA_ADDR_VW	SS_CC_ADDRESSES
HC_SCC_DA_EMAIL_VIEW	View Email Addresses	SCC_DA_ADDR_VW	SS_CC_EMAIL_ADDR
HC_SCC_DA_VIEW_PHONE	View Phone	SCC_DA_ADDR_VW	SS_CC_PERS_PHONE
HC_SCC_DA_HOLDS	Holds	SCC_DA_SS_HOLDS	SS_CC_HOLDS
HC_SC_DA_TODO	To Do List	SCC_DA_SS_TO_DO	SS_CC_TODOS

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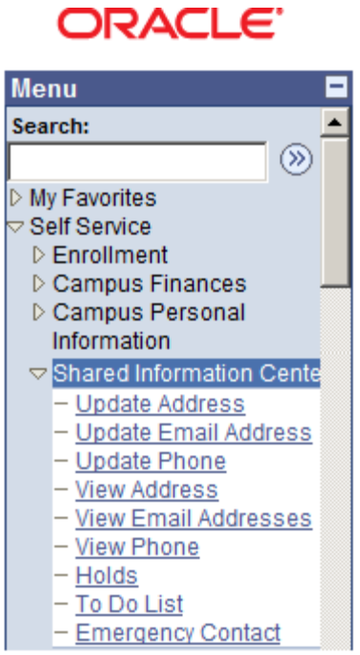
HC_SCC_DA_EMRG_CNTCT	Emergency Contact	SCC_DA_SS_EMRCNCT	SS_CC_EMERG_CNTCT

Each of the content references you create for Delegated Access should be added to the delivered *Self Service, Shared Information Center* portal folder. This will become the navigation the proxy will take to see all of the components that were delegated to him or her by one or multiple delegators (the search record override controls which data the proxy has access to view).

The following graphic shows an example of content references created under the Shared Information Center portal folder.

Note: The proxy will only see the navigation links for which he or she has been delegated access to.

Note: If you are making more components available for Delegated Access, we recommend you also add them under the *Self Service, Shared Information Center* portal folder. This will limit the number of places a proxy needs to navigate to access somebody else's data.



Example of content references inserted under the Shared Information Center portal folder

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The following two tables depict an example of how a component (*Emergency Contacts*) can be made available for delegated access and how it can be modeled on the existing student self-service component.

This table depicts the existing student self-service component:

Component	**Component Search Record**	**Menu**	**Menu Search Record Override**	**Portal folder**	**Content Reference**
SS_CC_EMERG_CNTCT	LS_SS_PERS_SRCH	CC_PORTFOLIO	n/a	Self Service, Campus Personal Information	Emergency Contacts

This table depicts the Delegated Access component:

Component	**Component Search Record**	**Menu**	**Menu Search Record Override**	**Portal folder**	**Content Reference**
SS_CC_EMERG_CNTCT	LS_SS_PERS_SRCH	SCC_DA_SS_EMRCNCT	SCC_DA_SRCH_VW	Self Service, Shared Information Center	Emergency Contacts

You create content references under *PeopleTools, Portal, Structure and Content*.

See PeopleTools Portal Technology PeopleBook.

Step 6: Setting Up Permission Lists and Roles for the Delegated Access Components

[Bundle 29. Added access to SCC_DA_AUTH_CHECK web service for the PAV process to run.]

Create a permission list to include the DA Menu (this is done through PeopleTools security components). To keep the security granular to be able to delegate access to a specific subject at a time, consider creating one permission list per DA Menu. For example, delivered with your system is a permission list called *CS - DA Contact Info Update*. It only contains one DA Menu (SCC_DA_SS_ADDRESS) that grants access to several components (Addresses, Email Addresses and Phone).

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This single permission list is then added to a role. Create a role to include the permission list (this is done through PeopleTools security components). The role created will become the Proxy Role Name when you create the delegation transactions in the next step. It is the role that will later be provisioned to the proxy to perform the transaction.

The following is a representation of how the sample components delivered with your system were included in a corresponding permission list and role.

Role Name	Permission List	Menu Name	Component Name
CS - DA Contact Info Update	HCCPCSSA1141	SCC_DA_SS_ADDRESS	SS_CC_ADDRESSES
		SCC_DA_SS_ADDRESS	SS_CC_EMAIL_ADDR
		SCC_DA_SS_ADDRESS	SS_CC_PERS_PHONE
CS - DA Contact Info View	HCCPCSSA1140	SCC_DA_ADDR_VW	SS_CC_ADDRESSES
		SCC_DA_ADDR_VW	SS_CC_EMAIL_ADDR
		SCC_DA_ADDR_VW	SS_CC_PERS_PHONE
CS - DA Emergency Contacts	HCCPCSSA1150	SCC_DA_SS_EMRCNCT	SS_CC_EMERG_CNTCT
CS - DA Holds	HCCPCSSA1170	SCC_DA_SS_HOLDS	SS_CC_HOLDS
CS - DA To Do List	HCCPCSSA1160	SCC_DA_SS_TO_DO	SS_CC_TODOS

See PeopleTools Security Administration PeopleBook for more information on creating roles and permission lists.

Granting access to the SCC_DA_AUTH_CHECK service operation

For each permission list that grants access to a DA menu, make sure it also grants access to the SCC_DA_AUTH_CHECK service operation. This web service is used by the Proxy Access Validation process when the proxy accesses a delegated component (PAV is triggered real time from the search record). You do so by accessing the permission list you created under PeopleTools, Security, Permission Lists (for example HCCPCSSA1141). In the Web Services tab, add the web service SCC_DA, click Edit and select *Full Access* for the SCC_DA_AUTH_CHK service operation. Additionally, ensure security to the SCC_DA_AUTH_CHECK service operation is also granted from the permission list you use to grant the delegators access to the Share My Information component and from the permission list used to grant your administrators access to the Review Shared Information component. This is needed because the PAV process also triggers real time when accessing both of these components.

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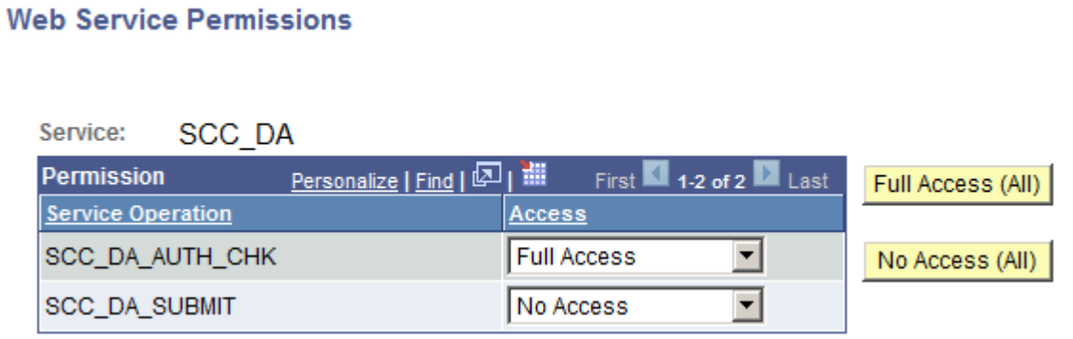

Example of how the SCC_DA_AUTH_CHK service operation should be setup inside the permission lists used by proxies, delegators and administrators

Warning: Not granting access to the SCC_DA_AUTH_CHECK service operation will result in self-service users not being able to access the *Share My Information* component and the administrators to not be able to access the *Review Shared Information* component.

Granting access to the SCC_DA_SUBMIT service operation

Granting access to the SCC_DA_SUBMIT service operation is only needed in the permission list used to grant a proxy access to the Proxy Terms and Conditions page (delivered with your system are permission lists HCCPCSSA1182 - CS - DA Proxy Terms&Conditions and HCCPCSSA1180 - CS - DA Proxy Terms&Cond_TEST). Access to this service is needed for the proxy to submit the information.

See Delegated Access Validation in the Understanding Delegated Access section for information on using the SCC_DA_SUBMIT service operation.

Also see New User Registration Framework and Delegated Access in the Understanding Delegated Access section for information on how these permission lists are used with the corresponding roles in New User Registration.

Step 7: Setting Up the Delegation Transactions

Use the Delegation Transaction Setup page to define a transaction and tie the role you created above to it. Define the delegation transactions in which the components made available for delegated access should be included. A transaction can be tied to one or multiple components. For instance, you can create a transaction that will only delegate access to the self-service Emergency Contacts component, or a transaction that will delegate access to all the self-service personal information components at once (refer to the delivered *Update Contact Information* and *View Contact Information* sample transactions for examples of this).

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The following is a representation of how the sample Delegated Access Transaction Codes delivered with your system were assigned a single role granting access sometimes to a collection of components, or to a single component.

DA Transaction Code	DA Transaction Name	Role Name	Component Name
SCC_DA_TXN_20120625080419	Update Contact Information	CS - DA Contact Info Update	SS_CC_ADDRESSES
			SS_CC_EMAIL_ADDR
			SS_CC_PERS_PHONE
SCC_DA_TXN_20120626014905	View Contact Information	CS - DA Contact Info View	SS_CC_ADDRESSES
			SS_CC_EMAIL_ADDR
			SS_CC_PERS_PHONE
SCC_DA_TXN_20120625080659	Emergency Contacts	CS - DA Emergency Contacts	SS_CC_EMERG_CNTCT
SCC_DA_TXN_20120625080559	View Holds	CS - DA Holds	SS_CC_HOLDS
SCC_DA_TXN_20120625080459	View To Do List	CS - DA To Do List	SS_CC_TODOS

For example, when a student delegates access to his or her parent the right to *Update Contact Information*, he or she is actually granting them access to the addresses, email addresses and phones self-service components. If the student delegates access to the *Emergency Contacts* transaction, he or she is granting the proxy access to the Emergency Contacts self-service component.

In the Delegation Transaction Setup component, identify the components, menu, and modes the delegator should have access to in order to delegate the transaction.

See Configuring Delegation Transactions section.

Step 8: Modifying the Proxy Terms and Conditions Page to Include Proper Constituent Fields

Review the Proxy Terms and Conditions self-service page and consider modifying the fields comprised inside the “Your Personal Information” subpage (SCC_DA_PERINFO_SBP). This subpage is delivered as a sample. Include the desired constituent fields you need to capture personal information about the proxy. If your delegation transactions are set to create an EMPLID for the proxies, make sure you gather enough information so Search/Match can use them as search data to identify or create an EMPLID.

The constituent fields that you can include in this subpage must be part of the *Constituent* entity or part of any of its children entities (for example, *Names, Email Address, Citizenship,* and so on). But you need to extend the SCC_DA:UTILS:DAUtils App Class methods to capture the data from new fields on this subpage.

Implementation recommendation: Do not modify the delivered SCC_DA_PERINFO_SBP page. Instead clone it and rename it as you wish.

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Terms and Conditions for accessing somebody else's data

Terms and Conditions

You have been granted access to view or update data that belongs to somebody else. By accepting these terms and conditions, you consent to protect the privacy of the data and to use or modify the data fairly and lawfully.

The following terminology applies to these Terms and Conditions: "Delegator" refers to the person who delegated you access. "Proxy" refers to you, the person authorized to view or update the Delegator's data on his or her behalf.

Agreement:
All proxies are required to sign this agreement for each of the delegators that delegated them access to their data confirming their understanding and acceptance of this policy. You sign the agreement by accepting the terms and conditions, entering your Security Key and your email address.

If you have any questions regarding these terms and conditions please contact the Help Desk at 1-800-333-7777.

☐ I accept terms and conditions

☐ I decline terms and conditions

Security Key (Security Key was included inside the email notification you received)

Contact Email (Email address where email notification was sent to you

Your Personal Information

First Name: Middle Name:

Last Name:

Gender:

Date of Birth:

National ID:

Mailing Address

Country:

Address Line 1:

Address Line 2:

Address Line 3:

City: State: Postal:

County:

SUBMIT

Terms and Conditions for Accessing Somebody Else's Data page (also known as the Proxy Terms and Conditions page)

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Step 9: Setting Up the URL to Access the New User Registration Login Page

The proxy receives the URL to access the New User Registration login page through email notification (it uses the delivered generic template DA_PROXY_GRANT). For the URL to be functionally appropriate, the host or kiosk information should be set up in New User Registration. Set up the values for the New User Registration constants that are in the application class SCC_IDENTITY_MGR:UTIL:NURConstants during your New User Registration implementation. These are the constants and their descriptions:

- *&TARGET_HOSTNAME*: Set up the URL of your server where you are running your PeopleSoft Campus Solution application in the form of <ServerName>.<DomainName>.com(*yourServer.yourDomain.com).*

- *&KIOSK_HOSTNAME:* Set up the URL of your server where you are running the KIOSK web profile in the form of <ServerName>.<DomainName>.com (*yourServer.yourDomain.com).*

The URL is created using the New User Registration constants application class and constructed in the SCC_DA_NOTIFICATION.NOTIFY.OnExecute application class. You can use the following concatenation to create the target URL that is emailed to the delegator. You can modify the URL as per your requirements. The link should direct the user to the New User Registration login sample page (or your own version of it) and once successfully authenticated, automatically transfer the user to the delegated access target page (the Proxy Terms and Conditions page). For this scenario, the logic could be:

Outside firewall: &url = "http://" | &NURConst.KIOSK_HOSTNAME | &NURConst.NUR_URI | "CAMPUS_URL= http://" | &NURConst.TARGET_HOSTNAME| &GATEKEEPER_URI

Inside firewall: target hostname(&TARGET_HOSTNAME) + Proxy Terms and Conditions page navigation part.

Note: Once a user is provisioned and is inside the firewall, then the user does not need to go through the GateKeeper. However, if you make it mandatory for the user to go through the GateKeeper, then you can receive the following benefits:

- The Gatekeeper can record self-service access metrics.

- Self-service users have a seamless experience if you reconfigure the target landing page for an application. Otherwise, users might get a broken link.

Note: The URL constructed in delegated access notification is aimed to redirect the proxies to New User Registration login page through KIOSK web profile. If you use a destination other than the sample New User Registration login page, you need to construct it.

See Using New User Registration Framework, Developer Reference to Deploy New User Registration, Step 7: Creating a URL to Access the New User Registration Login Page in the Campus Community package for bundle 29 for information about other New User Registration constants.

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Step 10: Setting Up New User Registration Framework or Required Proxy Security

[Bundle 29. Added information about proxy security.]

The URL created in the previous step transfers the proxy to the New User Registration login page or a custom version of it. Ensure that the proxy can sign into your system by either allowing the proxy to create a new user ID or reuse an existing user ID. If the proxy already has a user ID, he or she should not have to create a new one to take advantage of the delegated access to access your system. Similarly, if multiple delegators delegated access to a same proxy, this proxy should be able to access the system with the same user ID.

See the Developer Reference to Deploy New User Registration section in the Using New User Registration Framework chapter for information on how to setup New User Registration. The latest version of the Using New User Registration Framework chapter is in the Campus Community PeopleBook for bundle 29.

Note: If you use the New User Registration framework to facilitate the user experience for a proxy signing into your system, create a New User Registration Context ID that will transfer the proxy directly to the Proxy Terms and Conditions page after signing in.

See New User Registration Framework and Delegated Access in the Understanding Delegated Access section for information on how to setup the New User Registration Context value for delegated access.

If you are not planning on using the New User Registration framework, make sure your proxies (whether they are new or existing users) have access to the USER_PROFILE component interface. This is needed in order to give users access to the proper role tied to the delegated transactions. The delegated role provisioning occurs after the proxies accept the terms and conditions, and click the Submit button.

Note: If the New User Registration framework is used, the newly created user IDs are provisioned access to the USER_PROFILE content reference as part of the New User Registration initial setup.

Step 11: Modifying the Delegated Access Notification Templates

Define the text message you want to include in each of the email notifications triggered by Delegated Access. Go to *PeopleTools, Workflow, Notifications, Generic Templates* and modify the notification templates for Delegated Access.

See Notifications Framework and Delegated Access in the Understanding Delegated Access section for information on the notification templates.

Warning! Adding or removing template variables requires intensive code changes in the way the Delegated Access framework calls the Notifications framework. The email templates should not be used for extensive communication with the proxies or delegators.

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Step 12: Configuring Your System for Sending Email Messages through Notifications Framework

To invoke the Notifications framework:

1. Determine the point that triggers the Notifications framework.

This depends on the consumer functionality. A sample would be the Delegated Access framework's Share My Information - Details page from where the Notifications framework is triggered.

As shown in the graphic below, the Contact Name, Relationship and Email Address are defined on the page. The transactions for which access is to be granted or revoked are then selected or cleared. On clicking the Save button, the system triggers the Notifications framework.

As an example, you can refer to the Delegated Access application class SCC_DA.NOTIFICATION.NOTIFY as a reference to trigger the Notifications framework.

Share My Information - Details page

2. Instantiate the methods to consume the Notifications framework.

On instantiating the NotificationManager class, a Notification Header object will be instantiated. On calling the createNotificationDetail() method of NotificationManager class, Notification Detail object(s) will be created. Next, the consumer needs to use the createConsumerNotificationItems() method of NotificationManager to create the item(s) associated with the transaction. Finally, the send() method of NotificationManager will need to be invoked. This will in turn call Header send(), followed by Detail send() and Item send(). Item send() invokes NotificationRouter send(), which creates the appropriate channel object, in this case Email (EML), and calls send() of the EmailChannel app class. This in turn will call

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send() of the PeopleTools created PT_WF_NOTIFICATION.Notification which will deliver the email notification.

The methods that need to be used by consumer to consume the Notifications framework are given in the following steps:

1. Instantiate a NotificationManager object: NotificationManager()

Sample Code:

```
%This.ntfMgr = create
SCC_COMMON:NOTIFICATION:NotificationManager("SCC_NTF_CON_20120625084442");
```

2. Invoke the NotificationManager class method: createNotificationDetail()

Sample Code:

```
Local SCC_COMMON:NOTIFICATION:Accessors:NotificationRequestDetail &ntfReqDtl;

      &ntfReqDtl = &ntfMgr.createNotificationDetail(&myNtfCntxt,
&p_messageLog);
```

3. Invoke the NotificationManager class method: createConsumerNotificationItems()

Sample Code:

```
Local array of SCC_COMMON:NOTIFICATION:Accessors:NotificationRequestItem
&ntfReqItms;

      &ntfReqItms = &ntfMgr.createConsumerNotificationItems(&ntfReqDtl,
&myNtfCntxt, &p_messageLog);
```

4. Invoke the NotificationManager class method: send()

Sample Code:

```
Local string &lSccNtfreqId = &ntfMgr.Send(&p_messageLog);
```

5. Invoke the NotificationManager class method: Resend()

This should be used only when a resend of the previously sent set of notifications is required, and can be used only after issuing a send.

Sample Code:

```
&ntfMgr.ReSend(&p_SccNtfreqId, &p_messageLog);
```

Setting Up SMTP Server

See *PeopleTools PeopleBook: System and Server Administration*, Setting Application Server Domain Parameters

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About Logging

During Notifications framework processing, logging happens for following categories:

A. Exceptions

B. Reconcile Errors

C. Normal Errors

D. Warnings

E. Informational

Logging is done in two ways:

- Using People tools Application Logging feature to record all exceptions and reconcile errors (A and B categories listed above). Here, the system uses the People Tools WriteToLog built-in (with AppFenceSetting parameter value as %ApplicationLogFence_Error) to write the log details to either the application server or the TraceSQL log file that can be found in App Server log folder.

- For the other categories C, D and E, the errors, warnings, informational messages are recorded in tables: SCC_NTF_LOG and SCC_NTF_LOGPARM. You can query these tables to get the details.

Step 13: Activating the SCC_DA Web Service

[Bundle 29. Added step for activating the SCC_DA_AUTH_CHK service operation.]

To activate the web service:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations. The Service Operations - Search page appears.

2. Search for SCC_DA service, then select the SCC_DA_SUBMIT service operation.

3. On the General page ensure that the SCC_DA_SUBMIT service operation is active and regenerate both Any-to -Local and Local-to-Local routing definitions.

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General | Handlers | Routings

Service Operation: SCC_DA_SUBMIT
Operation Type: Synchronous
*Operation Description: Delegate Access Submit
Operation Comments:
User/Password Required
*Req Verification: None
Service Operation Security
Owner ID: Campus Community
Operation Alias:
Used with Think Time Methods

Default Service Operation Version

*Version: v1
Default
Active
Version Description: Delegate Access Submit
Version Comments:

Routing Status
Any-to-Local: Exists
Local-to-Local: Exists

Non-Repudiation
Runtime Schema Validation
Introspection
Delete Fault Type

Routing Actions Upon Save
Regenerate Any-to-Local
Regenerate Local-to-Local
Transactional
Warning: Regenerating sets all routing field values to their initial state.

Message Information

General page

4. Click the Service Operation Security link to access the Web Service Access page.

Web Service Access

Operation: SCC_DA_SUBMIT

Permission — Personalize | Find | First 1 of 1 Last

Permission List	Access
HCSPSERVICE	Full Access

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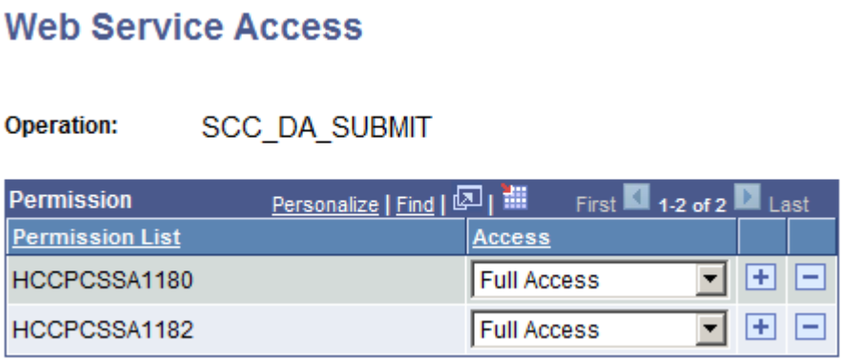

Web Service Access page

5. On the Web Service Access page make sure you select a permission list for which all users will have access. This permission list needs to be included in a role that is granted to all your users. The proxy can have a newly created user ID or use an existing user ID. Either way he or she needs to have access to a role that contains this permission list.

   Note: When setting up New User Registration, you are required to create a user ID called SCC_SS_TEMPLATE. This user id is cloned when a new User ID is created. The user ID template needs to have access to the basic security role called *Standard Non-Page Permissions*. This role contains the HCSPSERVICE permission list. So the proxies creating a new user ID will automatically have access to the SCC_DA_SUBMIT web service operation.

6. Perform the above steps, but this time for the SCC_DA_AUTH_CHK service operation. In step 4, make sure you select all the permission lists that grant access to a delegated transaction are listed. For example, with the sample delivered delegated transactions the following permission lists were created and therefore need to be listed in the Service Operation Security:

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Web Service Access

Operation: SCC_DA_AUTH_CHK

Permission	Personalize | Find | First 1-10 of 10 Last		
Permission List	Access		
HCCPCSSA1000	Full Access		
HCCPCSSA1010	Full Access		
HCCPCSSA1140	Full Access		
HCCPCSSA1141	Full Access		
HCCPCSSA1150	Full Access		
HCCPCSSA1160	Full Access		
HCCPCSSA1170	Full Access		
HCCPCSSA1180	Full Access		
HCCPCSSA1181	Full Access		
HCCPCSSA1182	Full Access		

Refer to “Step 6: Setting Up Permission Lists and Roles for the Delegated Access Components” for information about the SCC_DA_AUTH_CHK service operation.

Step 14: Verifying the Existence of the Request Handler

To verify that the request handler exists:

1. Select Set Up SACR, System Administration, Integrations, Request Handlers.
2. Search for SCC_DA service name and verify that the handler exists for both SCC_DA_SUBMIT and SCC_DA_AUTH_CHK service operations:

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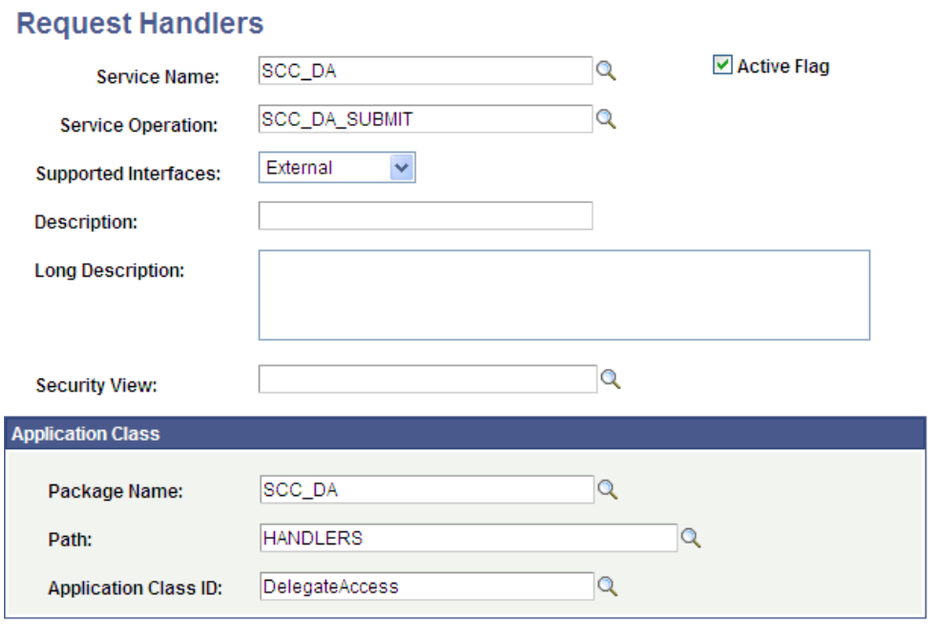
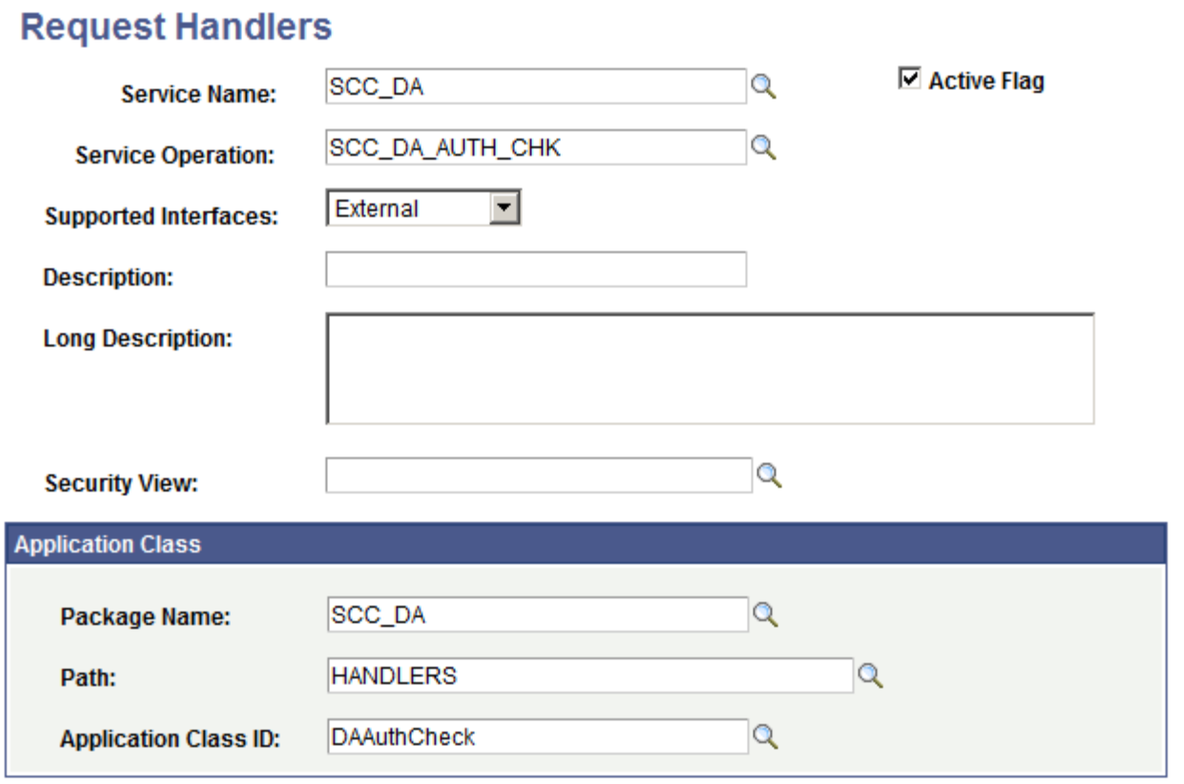


Request Handlers page showing the SCC_DA_SUBMIT



Request Handlers page showing the SCC_DA_AUTH_CHK

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Troubleshooting Delegated Access

[Bundle 29. New]

Error message 158,963

Message

Integration Synchronous Handler: No destination node can be determined for the request on node CS900QA2. (158,963) SCC_DA.UTILS.AbstractRequestGenerator.OnExecute
Name:submit PCPC:1803 Statement:29
Called from:SCC_DA.COMPONENTS.SS_CC_DA_TERMS_CON.OnExecute
Name:submitTnC Statement:26
Called from:SCC_DA.COMPONENTS.SS_CC_DA_TERMS_CON.OnExecute
Name:SCC_DA_SUBMIT_FieldChange Statement:105
Called
from:SS_CC_DA_TERMS_CON.GBL.SCC_DA_PRXY_WRK.SCC_DA_SUBMIT.FieldChange
Statement:1

After applying filters for sender specified routing, node transactions, relationship transactions and the PeopleCode event OnRouteSend, a destination node cannot be found.

OK

Replication	Resolution
The proxy accepts the Proxy Terms and Conditions and presses the Submit button.	Activate the web service SCC_DA. 1. Go to Peopletools > Integration Broker > Integration Setup > Service Operations. 2. Select Service = SCC_DA; Service Operation SCC_DA_SUBMIT. 3. Make sure you select the Active check box, and the Routing Status is set to 'Exists'.

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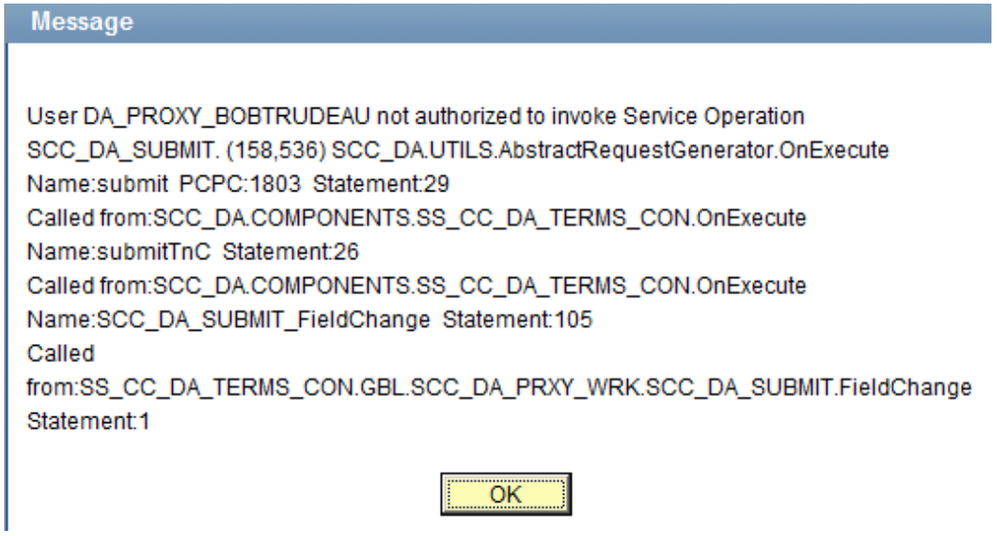
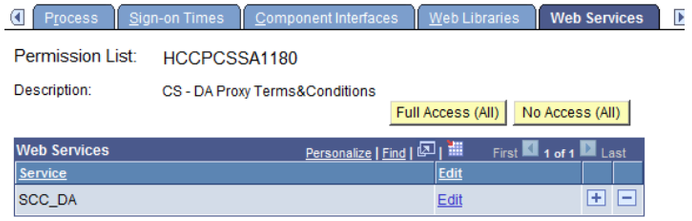
Error message 158,536



Replication	Resolution
The proxy accepts the Proxy Terms and Conditions and presses the Submit button.	• Give the proxy access to the HCCPCSSA1200 permission list, which grants access to the NUR Gatekeeper. You can include this permission list inside a role, for example: CS – NUR Gatekeeper. Make sure all new and existing users have access to the role. • Give the proxy access to the HCCPCSSA1180 permission list, which grants access to the SCC_DA web service. You can include this permission list inside a role, for example: CS - DA Proxy TermsConditions. Make sure all new and existing users have access to the role. 

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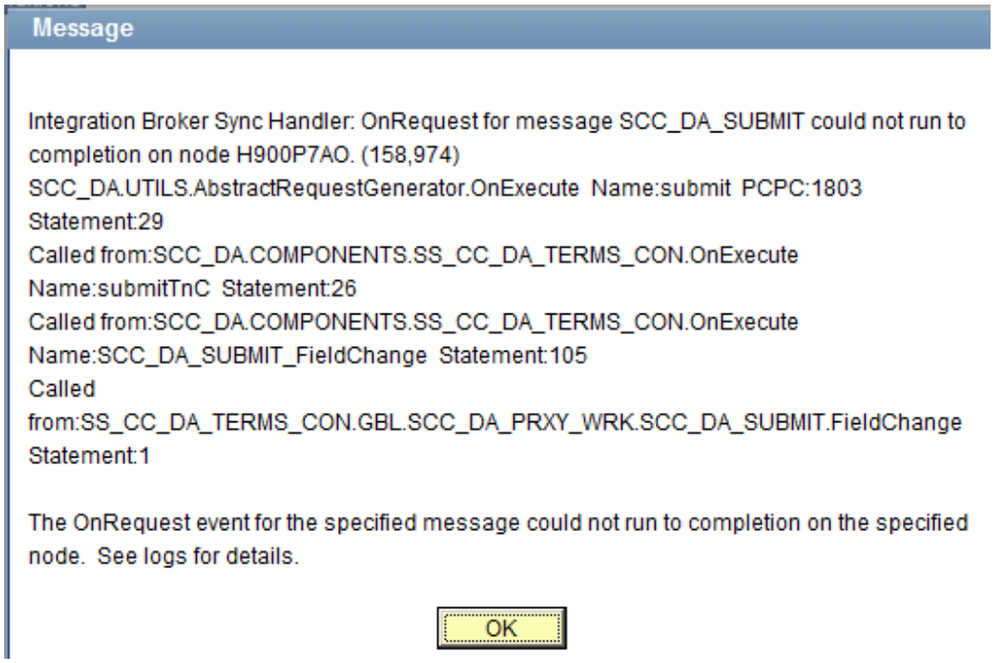
Error message 158,974



Replication	Resolution

The proxy accepts the Proxy Terms and Conditions and presses the Submit button.	The proxy user ID needs access to the USER_PROFILE component interface. To grant this access, do one of the following:
	• Create a permission list that grants access to the USER_PROFILE component interface, then assign it to all new or existing user IDs
	• Use the delivered roles:
	  ○ Standard Non-Page Permissions
	  ○ PeopleSoft User
	If New User Registration (NUR) is used, the NUR setup recommends adding these roles inside the user ID templates SCC_GUEST or SCC_SS_TEMPLATE.

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