



ADAM

Authority Delegation And Management

ADAM Training

Participant Guide

Version 2.0
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Topic 1: Help Guide Welcome

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Welcome to ADAM

Welcome to the **Authority Delegation and Management (ADAM)** Help Guide. This guide has been constructed to assist users in understanding how to effectively use the ADAM web-based application.

The ADAM Application is a web-based interface which enables the granting and managing of application access for the Ministry of Forests and Range (MoFR). If you would like to learn more about ADAM, visit [What is ADAM](#).

If you already understand the intent of the ADAM Application and would like to get started with this guide, visit [How do I use this guide](#).

If you aren't sure if this guide is for you visit [Who should use this guide](#).

How Do I Use This Guide?

You can access this guide by clicking the **Help** icon in the upper right corner of any web page (form) you are on in ADAM. When you click this icon, a separate browser window will open on top of the ADAM window. The browser window will display information about the page you are currently on in ADAM.

What if I want to explore this guide?

If you want to explore the guide for other information, simply click the **Show** link in the upper left corner on the Online Help Guide. This will display the **Table of Contents** for the entire guide. Think of each small **book** in the Table of Contents as a chapter of the guide. Click on the book to display the corresponding contents. Click on a **page** within the book to see the contents.

What type of information is available in this guide?

Each page of the guide includes details on the corresponding web application page, including:

- its intended use;
- its results;
- how to navigate to the page in the future; and
- what steps to perform to complete business tasks.

There is also a mock-up of each page to help you understand the various fields on that page. You will notice that each field is a hyperlink.

- Clicking a hyperlink will display a pop-up that includes **what** the field is and **why it is important** in the application.

Who Should Use this Guide?

If you are an ADAM User, you will find this guide helpful. You can visit chapters (books) and pages of the guide which are useful to you. It is highly recommended that all ADAM Users read the pages in the **Help Guide Welcome** and **Understanding ADAM** chapters.

The functions and features you can access in ADAM are directly related to your role in ADAM. Therefore, be sure to pay close attention to the Understanding Roles in ADAM help page to understand how roles work.

Below is a handy reference of which additional chapters might be useful to you according to your role:

If you are an...	Chapter...	Visit...
Application Administrator		
	Delegations	About Delegations to learn more
	Agreements	About Agreements to learn more
	Search & Information Display	About Searching to learn more
Authorization Grantor		
	Authorizations	About Authorizations to learn more
	Agreements	About Agreements to learn more
	Search & Information Display	About Searching to learn more
End User		
	Agreements	About Agreements to learn more

Topic 2: Understanding ADAM

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What is ADAM?

ADAM is a web based interface which enables the granting and managing of application access for web-based (Web-ADE) applications within the Ministry of Forests and Range.

Over the past few years, the ministry has adopted an Electronic Forest Management Initiative. An outcome of this initiative has been the transition of computer based applications to the web. This has made performing various business functions both efficient and convenient for ministry staff and clients. Examples of these web applications include FTA, RESULTS, SPAR, HBS, ECAS, etc.

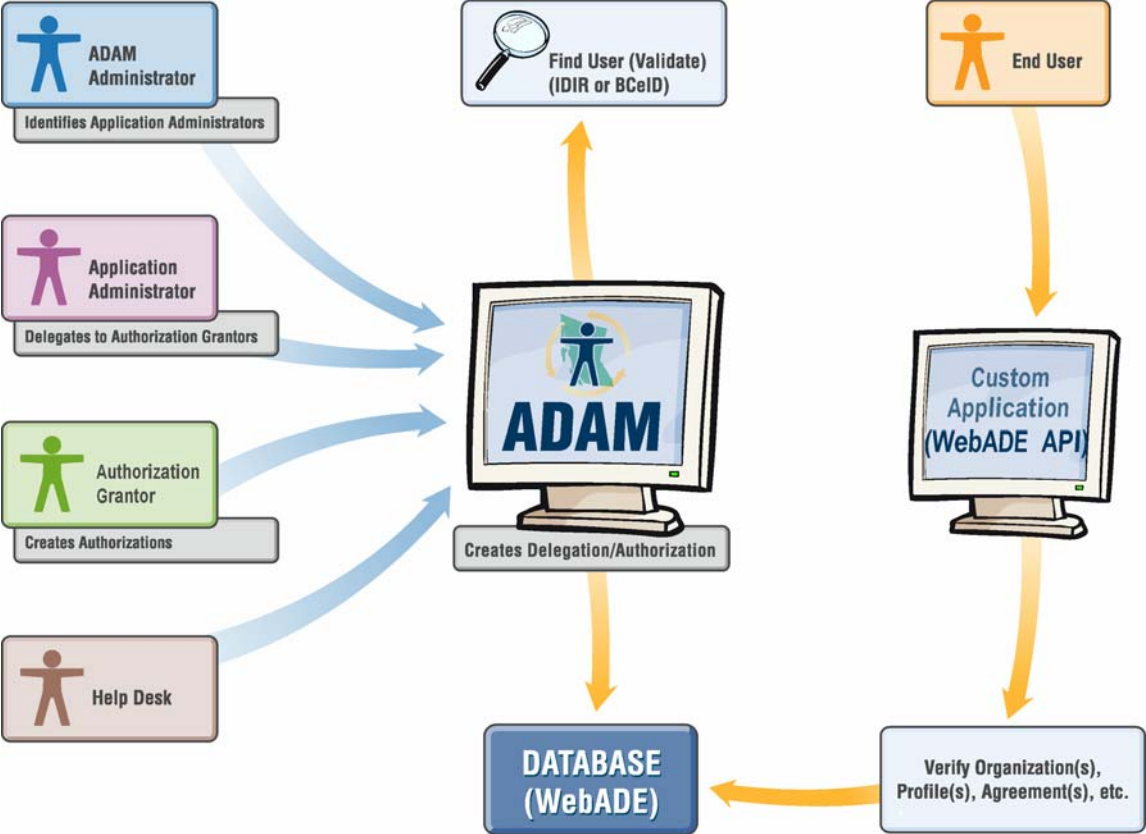
ADAM has been created to manage the authorizations for various users within each of these web-based applications. Authorization includes items such as:

- What functions and features does a user have access to in the application.
- Is the user able to enter, update, and delete information or can the user only view information.
- Should the user be able to access only a certain organization's data within the application.



ADAM does **not** manage *authentication*. Authentication is the process of allowing the user to enter the application web site. This is performed via authenticating sources such as IDIR accounts and BCeID User IDs. Note: These IDs are issued by CITS.

ADAM is responsible for setting *authorizations*. Authorizations are the functions and features a user can perform in the application. The Web Application is responsible for implementing the Authorization (i.e. asking the right questions). ADAM is the management tool of the authorization.



How Do I Access ADAM?

Who uses ADAM?

ADAM is accessible to select individuals whose job function includes the management of Delegations and/or Authorizations for one (or more) MoFR application(s). Within ADAM, a user may have one of the roles as outlined in the [Understanding Roles in ADAM](#) page .

Any End User of an application may also access ADAM to view his/her authorizations. The Scenario Flow Chart may help you better understand these.

Step #1: Do you have an IDIR or BCeID User ID?

To obtain access to ADAM, you will need a current **IDIR User ID** (for government staff) or **BCeID User ID** (for non-government organizations).

If you are a new company (you do **not** have a BCeID), navigate to <http://www.for.gov.bc.ca/his/esd/> and select the link titled "If your company does not have a BCeID please see BCeID Enrollment Process".

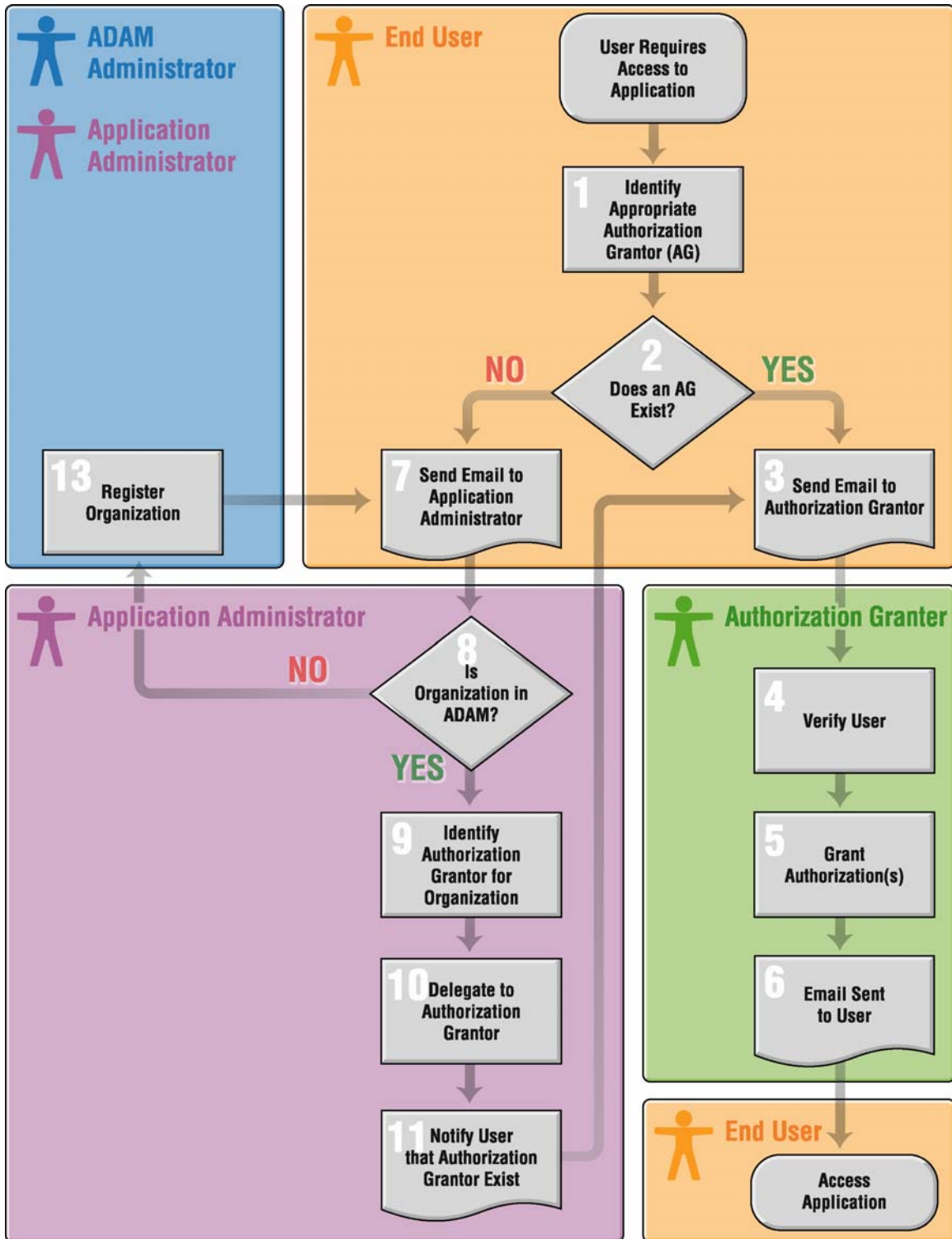
Step #2: Set Up your BCeID User ID to work in ADAM

If you have a BCeID User ID you need to take special action if you wish to be the recipient of a Delegation and/or Authorization. To learn more, read [BCeID Special Action](#).

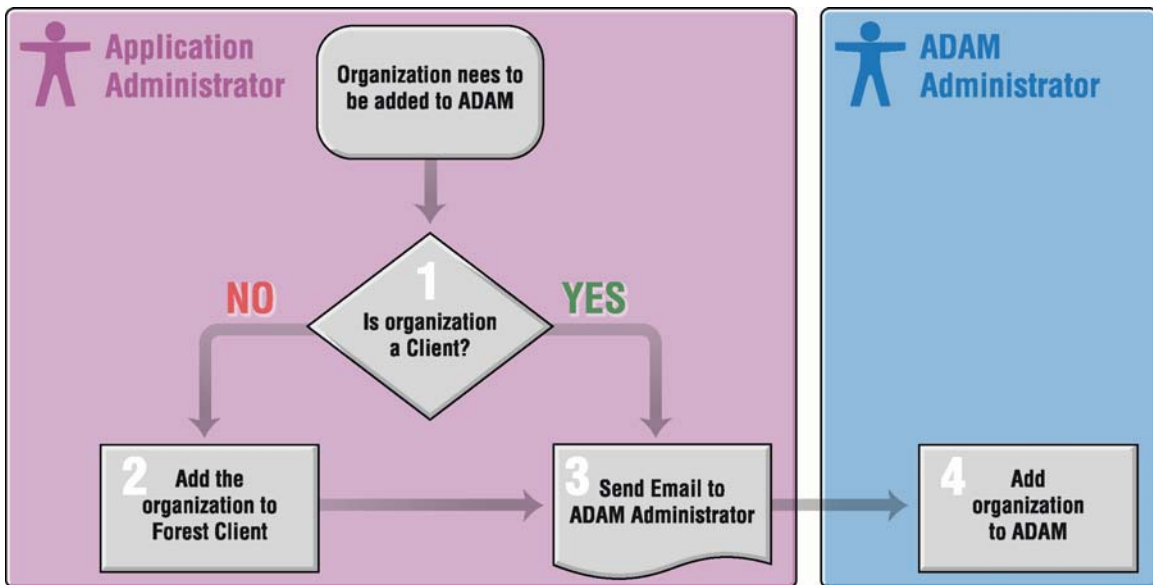
Additional Steps

Application Administrators will need to perform additional steps in ADAM. These steps will vary depending on whether or not the appropriate **Authorization Grantors** have been previously determined in ADAM. For a flow chart explaining these steps, visit the [User Access Request](#) page.

User Access Process



Organizational Access Process



Understanding the Home Page

Use: The **Home Page** is the first page you will see once you log onto ADAM. It has been designed so that you can quickly navigate to various functions and features customized for you. Think of the **Home Page** as being divided into these sections:



- **ADAM Functions** - The left navigation pane provides you with links to the various functions and features which you have access to in ADAM. Note that the links that are available to you may differ than those available to a co-worker. This is because ADAM provides links based on the level of authorization associated with your User ID.
- **ADAM Notifications** - The middle section of the page consists of various notifications which have been created just for you. For example, ADAM will use this section of the page to notify you of: Delegation E-Agreements which you need to accept, Authorizations which are expiring, etc. These notifications should serve as helpful prompts to you. Keep in mind that your notifications will differ from those of your co-workers. Notifications only display when there is something important ADAM needs to alert you of.
- **Government Web Tools** - ADAM has been created to match the standard government web design. This means functions such as searching are available.

Results: You can navigate to various functions of ADAM.

Access the page: This is the first page you will see when you log-on to ADAM.

How to: This is a **view only** page which means you cannot modify or delete data on this page. You may only read data. Use the links provided to navigate to another page in ADAM.

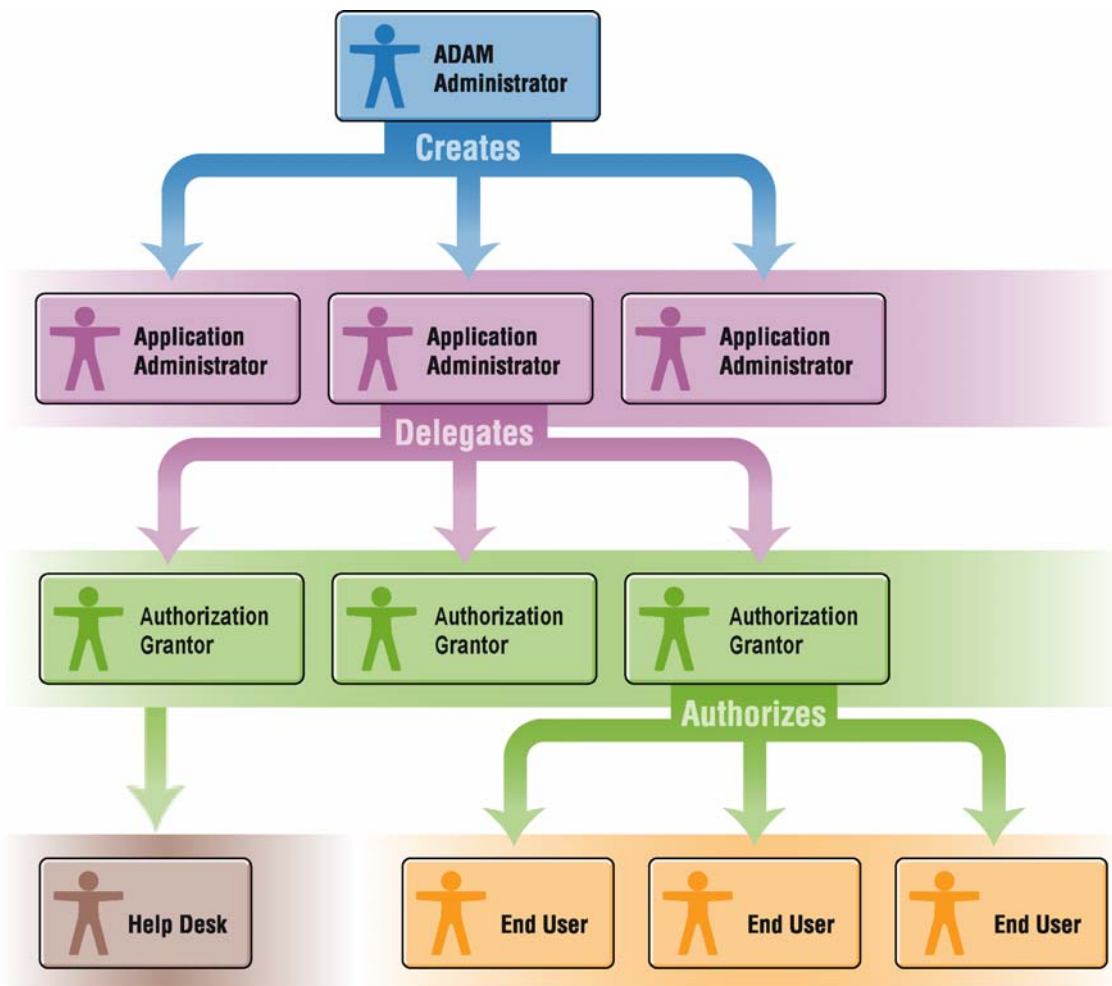
Below is a screen print which shows a sample **ADAM Homepage**. Click on various areas of the screen print to learn more.

	Search <input type="text"/> Go Advanced Search ▶	Main Index ▶ Contact Us ▶ Help ?
<p>B.C. Home</p> <p>Ministry of Forests & Range</p> <p>ADAM - Authority Delegation And Management</p> <ul style="list-style-type: none"> ▶ Authorizations <ul style="list-style-type: none"> My Authorizations New Authorization Manage Auths ▶ Delegations <ul style="list-style-type: none"> My Delegations ▶ Agreements <ul style="list-style-type: none"> My Agreements Manage Acceptance <p>Exit this e-service ▶</p>	<div style="text-align: center;">  <p>ADAM Authority Delegation And Management</p> </div> <p>Welcome to the Authority Delegation And Management e-Service. This tool provides the ability to manage access control to Ministry applications via a simple easy-to-use Web interface.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <p style="text-align: center; margin: 0;">ADAM Messages</p> </div> <p>NOTICE - You have an unaccepted user agreement "Delegation". You will not be able to perform certain functions until this agreement is accepted. Click here to visit the "My Agreements" screen.</p> <hr/> <p>WARNING - You have a delegation to profile "IAPP_DATA_ENTRY" that expires in 7 days. Once this delegation expires you will no longer be able to authorize this profile in ADAM. Click here to visit the "My Delegations" screen.</p> <hr/> <p>NOTICE - You have an authorization to profile "IAPP_ADMINISTRATOR" that expires in 21 days. Once this authorization expires you will no longer be able to access the application using this profile. Click here to visit the "My Authorizations" screen.</p>	<p>→ Getting Started</p> <ul style="list-style-type: none"> What is ADAM? How do I access ADAM? Roles in ADAM Understanding this Page Demonstration of ADAM <p>→ Related Links</p> <ul style="list-style-type: none"> Support Contacts

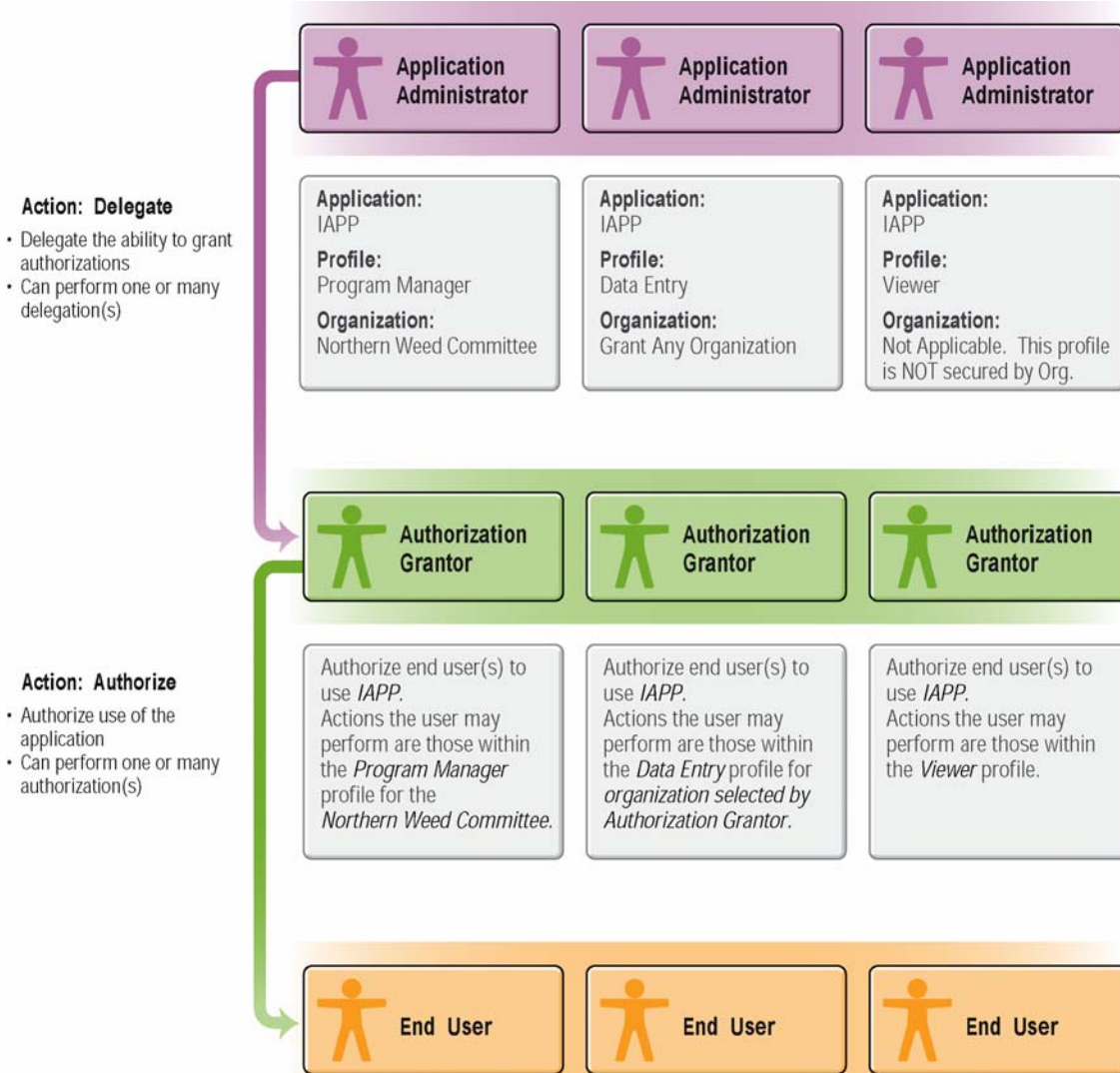
Understanding Roles in ADAM

ADAM is **Role Specific**. Any task or function that you may perform in ADAM is dependent upon the role you have. The following graphic denotes these roles.

An ADAM User may have more than one of the roles. However, a User who has a higher level role (e.g. Application Administrator) does not automatically have the lower level roles (e.g. Authorization Grantor, End User, and/or Help Desk).

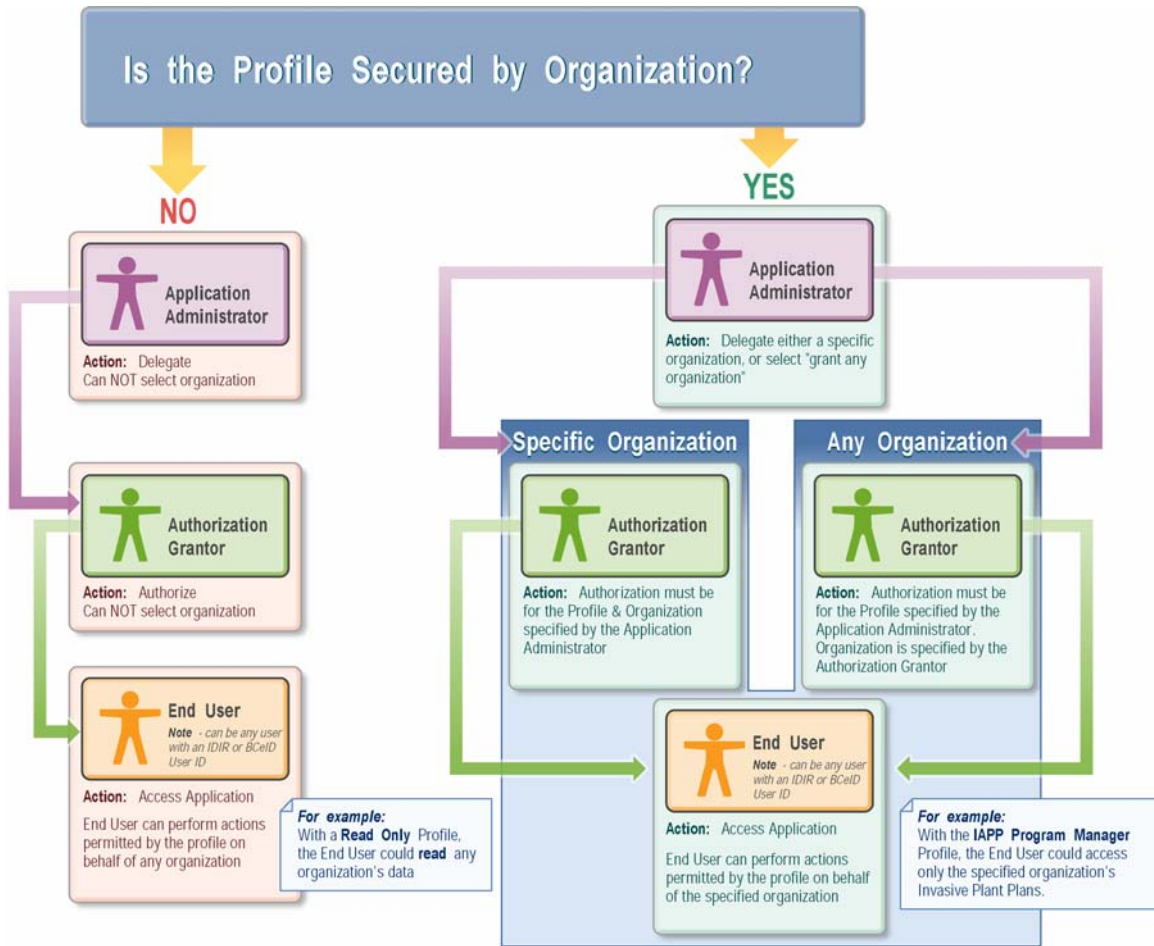


Scenario Flow Chart



Understanding the Profile & Organization Link

Profiles in ADAM may be **secured** or **not secured** by Organization. The following image depicts this process.



Demonstrations of ADAM

If you would like to watch a demonstration of ADAM, click the corresponding **Show Me** icon below. If you are having trouble playing the demonstration, please visit the Demo Tips page for additional information.



Add a Delegation

You can watch a demonstration of adding a new **Delegation** to ADAM by clicking the **Show Me** icon to the left.



Add a Batch Delegation

You can watch a demonstration of adding a **Batch Delegation** to ADAM by clicking the **Show Me** icon to the left.



Add an Authorization

You can watch a demonstration of adding a new **Authorization** to ADAM by clicking the **Show Me** icon to the left.



Add a Batch Authorization

You can watch a demonstration of adding a new **Batch Authorization** to ADAM by clicking the **Show Me** icon to the left.



End User

You can watch a demonstration of an **End User** in ADAM by clicking the **Show Me** icon to the left.

Topic 3: Delegations

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About Delegations

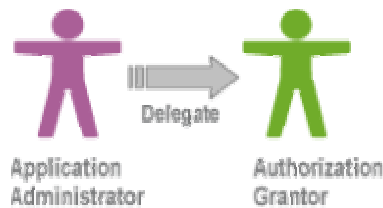
What is a delegation?

A delegation is the action of providing another user, or yourself, with the ability to authorize End Users to perform specific functions within an application for a given organization.

Confused about delegations? The Scenario Flow Chart may help you better understand these.

Who can perform a delegation?

You must have a status of **Application Administrator** in ADAM in order to perform a delegation. The individual receiving the delegation will become an **Authorization Grantor** in ADAM.



The following matrix describes the pages in ADAM that an Application Administrator has access to:

	Application Administrator	Authorization Grantor
My Delegation		
New Delegation		
Manage Delegation		

	Application Administrator	Authorization Grantor
My Authorizations		
New Authorizations		
Manage Authorizations		

Why delegate?

Delegating allows other individuals to hold, and share, the responsibility for establishing appropriate End User access to an application.

For example...

Jill Smith is an Application Administrator in ADAM for the Invasive Alien Plants Program (IAPP). This is a relatively new application managed by the Ministry of Forests and Range. Jill has many tasks to deal with so she decides she will delegate the task of establishing appropriate end user access to the IAPP.

To complicate matters, Jill knows that the "Northern Weed Committee" requires access to their data in the application right away. She knows they will need to complete functions available to the profile of "Biological Agent Manager". Jill is confident Jack Black can handle the task of setting up the End Users.

Jill logs on to ADAM as an Application Administrator for IAPP. She completes the following new delegation for Jack:

- Allow User - JBLACK
- To add authorizations for - NORTHERN WEED COMMITTEE
- With this authorization profile - IAPP_BIOLOGICAL_MANAGER
- Effective date - IMMEDIATELY
- Expiry date - NEVER EXPIRES
- Enabled - YES

Delegation Demonstrations



Add a Delegation

You can watch a demonstration of adding a new **Delegation** to ADAM by clicking the **Show Me** icon to the left.



Add a Batch Delegation

You can watch a demonstration of adding a **Batch Delegation** to ADAM by clicking the **Show Me** icon to the left.

My Delegations

Use: This page is used to view delegations which have been created for you in the ADAM Application.
Data will display on this page if an **Application Administrator** has delegated you as an **Authorization Grantor**.
Visit [About Delegations](#) to learn more.

Results: This page displays all of your delegations.

Access the page: To access this page:

- Select **My Delegations** from the left navigation bar. If you do not see **My Delegations** in the left navigation bar, then you do not have any delegations.
- If you require delegations, you should discuss this with your Application Administrator.

How to: This is a **view only** page which means you cannot modify or delete data on this page. You may only read data.

① Click the **My Delegations** link.

② View the data.

In this mock-up form, click on the underlined name of a field or a button. A pop-up window appears with explanations and information on codes.

ADAM 210 - My Delegations

This is a listing of all of the Administrative Delegations that you have been assigned. This is a listing of all the Profiles/Organizations that you have access to create eAuthorizations for.

Results 1 - 1 of 1.

Results Page: 1

<u>Delegated To</u>	<u>Delegated Profile Name</u>	<u>Delegated Organization</u>	<u>Expiry Date</u>
JBLACK	IAPP_PROGRAM_MANAGER	00011111 - Northern Weed Committee	9999-12-31

New Delegation

Use: As an **Application Administrator**, you can use this page to add a new **Delegation** to ADAM. A delegation allows you to delegate another user (or yourself) as an **Authorization Grantor** in ADAM.

Your delegation will specify the:

- user;
- organization; and
- profile.

Results: A new delegation (**Authorization Grantor**) is created. The **Authorization Grantor** will receive an email detailing the delegation.

- **Note:** The Authorization Grantor's email address must be contained in his/her BCeID or IDIR User ID profile. This is NOT entered in ADAM.

Access the page: To access this page:

- Select **New Delegations** from the left navigation bar.

If the **New Delegations** link is **NOT** visible in your left navigation bar then you are not authorized to add delegations in ADAM. You must have the **Application Administrator** authority in ADAM to add delegations.

How to: Follow these steps to use this page:

- 1 Click the **New Delegations** link.
- 2 Enter the User ID of the user you wish to add a delegation for in the **Allow User** field. The User ID must be preceded by the domain (e.g. idir\jsmith). If you use the **Find User** button, the domain will be automatically entered for you.
Note: If you are having trouble finding a BCeID User, ensure the recipient of the delegation has read BCeID Special Action.
- 3 Select the profile for this delegation using the **With this Authorization** field.
 - **Note:** You may have noticed that this field displays below the **To Add Authorizations For & Grant Any Organization** fields. However, your selection in this field (**With this Authorization**) will affect your selections in the **To Add Authorizations For & Grant Any Organization** fields. Therefore, entering data in the **With this Authorization** field must be completed before the **To Add Authorizations For & Grant Any Organization** fields are completed.
- 4 Specify the organization for this delegation. You may either:
 - Enter a specific organization in the **To Add Authorizations For** ; or,
 - Select **Grant Any Organization** to allow all organizations.

If you are unable to access one or both of these fields, it is due to the profile you have selected in Step #3. The profile selected may not be secured by organization.



- 5 Enter the date you wish the delegation to come into effect using the **Effective Date** field.
 - If you would like the delegation to come into effect immediately, check the **Immediately** checkbox and do not enter an Effective Date.
- 6 Enter the date you wish the delegation to become void using the **Expiry Date** field.
 - If you would like the delegation to remain active indefinitely, select the **Never Expires** checkbox and do not enter an Expiry Date.
- 7 Click the **Enabled** checkbox to activate the delegation.
- 8 If you require an agreement for this delegation, click the **Agreement Required** checkbox.
 - A field titled **Acceptance Agreement** will automatically display once this checkbox is ticked.
- 9 Enter any applicable notes in the **Comments** field.
- 10 Click the **Create Delegation** button.
 - You will receive a Delegation Processing Status page with the details of this delegation.

**Warning: Delegations to BCeID User IDs**

At this time, please do **not** create a Delegation with the **Grant Any Organization** check box ticked for a BCeID User ID.

In this mock-up form, click on the underlined name of a field or a button. A pop-up window appears with explanations and information on codes.

ADAM 220 - Create a New Delegation

Create a New Delegation		Switch to Batch Mode	
Allow User	<input type="text"/>	Find User...	
Grant Any Organization	<input type="checkbox"/>		
To Add Authorizations For	<input type="text"/>		
	Find...		
With This Authorization Profile	<input type="text"/> ▼		
Effective Date	<input type="checkbox"/> Immediately	OR	<input type="text"/> 
Expiry Date	<input type="checkbox"/> Never Expires	OR	<input type="text"/> 
Enabled	<input type="checkbox"/>		
Agreement Required	<input type="checkbox"/>		
Acceptance Agreement	<input type="text"/> ▼		
Comment	<input type="text"/>		
<input type="button" value="Create Delegation"/>			

New Delegation - Batch Mode

Use: As an **Application Administrator**, you can use this page to add a **Batch Delegation** to ADAM. Adding a batch delegation is similar to adding a single delegation, except, it allows for multiple delegations to be added simultaneously.

A delegation allows you to delegate another user (or yourself) as an **Authorization Grantor** in ADAM.

Your delegation will specify the:

- user;
- organization; and
- profile.

Note: When adding a batch delegation do not mix profiles which are secured by organization with those that are not secured by organization. See the Batch Delegation Profile tip.

Results: A new **Batch Delegation** is created in ADAM. The **Authorization Grantors** will each receive an email detailing the delegation.

- Note: Each Authorization Grantor's email address must be contained in his/her BCeID or IDIR User ID profile. This is NOT entered in ADAM.

Access the page:

To access this page:

- Select **New Delegations** from the left navigation bar.
- Click **Switch to Batch Mode**.

If the **New Delegations** link is **NOT** visible in your left navigation bar then you are not authorized to add delegations in ADAM. You must have the **Application Administrator** authority in ADAM to add delegations.

How to:

The steps below outline how to use this page if you wish to enter the Batch Delegation. Alternatively, you may upload a file containing the Batch Delegation data using the **Bulk Load Delegations** section of this page.

- To bulk load delegations, use the **Browse** button to locate the file and then click the **Submit** button. The file must match the specifications.

① Click the **New Delegations** link.

② Click the **Switch to Batch Mode** link.

Switch to Batch Mode

③ Enter the User ID(s) of the user(s) you wish to add a delegation(s) for in the **Allow User(s)** field. You must click the **Find** button and locate users using the **User Search**. Then you may add each user. Visit the [User Search - Batch](#) help page for additional assistance.

- Once you return to the **Create a New Delegation (Batch Mode)** page, you will notice that each user is highlighted in blue. If you wish to:

- De-select a user (the row is highlighted blue), click on the row of data containing that user. The row will no longer be highlighted.
- Select a user (the row is not highlighted), click on the row of data containing that user. The row will become highlighted.
- You can select multiple users by holding the **Ctrl** key on your keyboard while clicking each row.

Note: If you are having trouble finding a BCeID User, ensure the recipient of the delegation has read "BCeID Special Action".

- 4 Specify the organization(s) for this delegation using the Organization Search. Visit the [Organization Search - Batch](#) help page for additional assistance. You may either:
 - Enter specific organization(s) in the **To Add Authorizations For**. (You can select and de-select each/multiple rows using the same method explained in Step #3.); or,
 - Select **Grant Any Organization** to allow all organizations.

Note that if you are going to select a profile that must be for all organizations, you should select **Grant Any Organization**. Otherwise, you will be unable to add this delegation.
- 5 Select the profile(s) for this delegation using the **Using These Authorization Profiles** field. (You can select and de-select each/multiple rows using the same method explained in Step #3.).
- 6 Enter the date you wish the delegation(s) to come into effect using the **Effective Date** field.
 - If you would like the delegation(s) to come into effect immediately, check the **Immediately** checkbox and do not enter an Effective Date.
- 7 Enter the date you wish the delegation(s) to become void using the **Expiry Date** field.
 - If you would like the delegation(s) to remain active indefinitely, select the **Never Expires** checkbox and do not enter an Expiry Date.
- 8 Click the **Enabled** checkbox to activate the delegation(s).
- 9 If you require an agreement for this delegation(s), ensure the **Agreement Required** checkbox is ticked.
 - A field titled **Acceptance Agreement** will automatically display once this checkbox is ticked. Use this field to select the **Acceptance Agreement** you require.
- 10 Enter any applicable notes in the **Comments** field.
- 11 Click the **Add Delegation** button.
 - You will receive a [Delegation Processing Confirmation](#) page with the details of this delegation(s) for you to confirm.



Warning: Delegations to BCeID User IDs

At this time, please do **not** create a delegation with the **Grant Any Organization** option selected for a BCeID User ID.

In this mock-up form, click on the underlined name of a field or a button. A pop-up window appears with explanations and information on codes.

ADAM 220 - Create a New Delegation

Create a New Delegation

Allow User(s):
(Select Multiple)

[Find User...](#)

Grant Any
Organization

To Add
Authorizations
For: (Select
Multiple)

[Find...](#)

Using These
Authorization
Profiles (Select
Multiple)

IAPP_ADMINISTRATOR
IAPP_BIOLOGICAL_AGENT_MANAGER
IAPP_DATA_ENTRY
IAPP_PROGRAM_MANAGER
IAPP_VIEWER


Effective Date

 Immediately

OR 

Expiry Date

 Never Expires

OR 

Enabled

Agreement
Required

Acceptance
Agreement

Comment

Add Delegations

Bulk Load Delegations

Upload
Delegations:

Browse...

Submit

Manage Delegations

Use: As an **Application Administrator**, you can use this page to manage existing **Delegations** in ADAM.

Results: This page acts like a search page. It allows you to search for existing delegations. The delegations display in the bottom portion of the page. From here, you will be allowed to update the delegation. You may update any delegation which is associated with the application and profiles you are an Application Administrator for. These will contain an **Edit** button.

There can be more than one Application Administrator for a specific application. Therefore, it is possible that you will be able to update delegations which you did not create.

Access the page:

To access this page:

- Select **Manage Delegations** from the left navigation bar.

If the **Manage Delegations** page is **NOT** visible in your left navigation bar then you are not authorized to manage delegations in ADAM. You must have the **Application Administrator** authority in ADAM to manage delegations.

How to:

Follow these steps to use this page:

- 1 Click the **Manage Delegations** link.
- 2 Using the Search for Delegations portion of the page, enter the criteria you wish to find delegations for.
 - **Note:** If you wish to examine all delegations that you have access to, you may leave all fields blank.
 - Remember, a profile is the type of role a user can have within an application. This determines the functionality a user can perform. Often a profile also affects the data that the user has access to.
- 3 Click the **Search** button.
- 4 Examine the delegations in the bottom portion of the page.
 - Click the **Update** button to navigate to the [Manage Delegations](#) page. On this page you can modify the delegation.
 - Click a **User ID** to navigate to the [User Information](#) page for that user.



Search Tips

On this page, you may enter partial values into the **User** and/or **Delegated Organization** fields. When you complete the search, your results will show all results which match those partial entries.

For example, if you enter "jsm" in the User field, results would show all delegations you have access to for User ID's which contain "jsm" (i.e. jsmith, jsmythe, etc.).

In this mock-up form, click on the underlined name of a field or a button. A pop-up window appears with explanations and information on codes.

ADAM 230 - Manage Delegations

This is a listing of all of the Administrative Delegations that you have assigned or have access to view and/or modify.

Search for Delegations

User	<input type="text"/>	<u>Find...</u>	<input type="button" value="Search"/>
Profile Name	<input style="border-bottom: 1px solid black;" type="text"/> ▼		
Delegated Organization	<input type="text"/>	<u>Find...</u>	
Show Deleted?	<input type="checkbox"/>		

Action	Delegated To	Delegated Profile Name	Delegated Organization	Grant Any Org	Expiry	Deleted
<input type="button" value="Edit"/>	JSMITH	IAPP_BIOLOGICAL_AGENT_MANAGER	00011111 - Northern Weed Committee	No	9999-12-31	No
<input type="button" value="Edit"/>	FFLINSTONE	IAPP_BIOLOGICAL_AGENT_MANAGER	00022222- Southern Weed Committee	No	2006-01-01	No

Associated Pages - Delegations

Delegation Process Confirmation - Batch

Use: This page is used to confirm a **Batch Delegation** in ADAM.

Results: This page allows you to complete the batch delegation. The page shows any delegations which were not approved as well as those which were approved.

Access the page: This page displays when you click the **Add Delegations** button on the batch delegation page.

How to: Follow these steps to use this page to confirm the addition of the batch delegations:

- 1 Review the batch delegations. Pay close attention to the **Approved?** column. If this column contains:
 - Yes, then the corresponding delegation has been approved.
 - No, then the corresponding delegation has **NOT** been approved and will not be added to ADAM.
- 2 Examine the first column. This column contains a check mark for each approved delegation. If you do not wish to add a delegation, click the box (to remove the tick).
- 3 Click the **Complete** button to add all delegations which are approved and contain a tick in the first column.



If the delegation is **not** approved by ADAM, you can roll your mouse over the delegation (blue text) and an explanation is displayed.

The following are examples of unapproved delegations:

- Your batch delegation includes delegations for profiles which are secured by organization and those which are not secured by organization.
- The delegation you are attempting to create already exists in ADAM.

In this mock-up form, click on the underlined name of a field or a button. A pop-up window appears with explanations and information on codes.

ADAM 280 - Delegation Process Confirmation					
The following delegations are to be created:					
	User	Profile Name	Organization	Agreement Required	Approved?
<input checked="" type="checkbox"/>	MPOPPINS	IAPP_DATA_ENTRY	Northern Weed Committee	Yes	Yes
<input checked="" type="checkbox"/>	BBUNNY	IAPP_DATA_ENTRY	Northern Weed Committee	Yes	Yes
<input checked="" type="checkbox"/>	RRIDINGHOOD	IAPP_DATA_ENTRY	Northern Weed Committee	Yes	Yes

Delegation Processing Status Batch

- Use:** This page is used to display the results of a **Batch Delegation** in ADAM.
- Results:** This page allows you to examine the details of the batch delegation.
- Access the page:** You may access this page by clicking the **Complete** button on the Delegation Process Confirmation page.
- How to:** There are two actions you may perform on this page.
- You may click the **User Name** to navigate to the User Information page.
 - You may click the **OK** button to navigate directly to the Manage Delegations page.

In this mock-up form, click on the underlined name of a field or a button. A pop-up window appears with explanations and information on codes.

ADAM 290 - Delegation Processing Status				
The following delegations are to be created/updated:				
User	Profile Name	Organization	Agreement Required	Success?
MPOPPINS	IAPP_DATA_ENTRY	Northern Weed Committee	Yes	Yes
BBUNNY	IAPP_DATA_ENTRY	Northern Weed Committee	Yes	Yes
RRIDINGHOOD	IAPP_DATA_ENTRY	Northern Weed Committee	Yes	Yes

OK

Delegation Processing Status

- Use:** This page is used to display the results of a delegation.
- Results:** This page allows you to view the details of the delegation.
- Access the page:** This page is displayed automatically once:
- the Create Delegation button is clicked on the [New Delegation](#) page
 - or the Update Delegation button is clicked on the Update Delegation page.
- How to:** There is only one action you may perform on this page. You may click the **OK** button to navigate directly to the [Manage Delegations](#) page.

Below is a screen print which shows a sample delegation created in ADAM. Notice the following:

- The delegation was created by user = jreynolds;
- The delegation was for user = IAPPD_SWITCH. This user is now an Authorization Grantor;
- The organization is Ministry of Agriculture and Food;
- The profile is IAPP_DATA_Entry;
- The delegation is effective from Dec 08 2005 to Dec 08 2006;
- The delegation is enabled; and,
- The delegation requires IAPPD_SWTICH to accept an agreement.

ADAM250 - Delegation Processing Status

Status: Operation Completed Successfully

Action: Create

Action Date: 2005-12-08

Action By: VIVIDSOLUTIONS\JREYNOLDS

Delegate To: VIVIDSOLUTIONS\IAPPD_SWITCH

Delegated By: VIVIDSOLUTIONS\JREYNOLDS

Organization: 00096425 - MINISTRY OF AGRICULTURE AND FOOD

Authorization Profile: IAPP_DATA_ENTRY

Effective Date: 2005-12-08

Expiry Date: 2006-12-08

Delegation Enabled: Yes

Agreement Required: Test

Comment: IAPPD_SWITCH can now grant authorizations.

Update Delegation

Use: This page is used to modify an existing delegation.

Results: This page allows you to edit or delete an existing delegation. In addition, you may view the history of a delegation.

You may modify the following details of a delegation:

- Effective Date
- Expiry Date
- Delegation Enabled Checkbox
- Comments


Access the page:

To access this page:

- Navigate to the **Manage Delegations** page and search for the delegation you wish to update.
- Click the **Edit** button next to the delegation you wish to update.
- You will be navigated to this page (Update Delegation).
- Note: Please visit the [Manage Delegations](#) help topic for additional information.

How to: Follow these steps to use this page to update a delegation:

- 1 Verify that you are updating the correct delegation by examining the **Delegate To** and **Delegated By** fields.
- 2 Edit those fields which you wish to modify.
- 3 Click the **Update Delegation** button.



 Do **not** click the **Delete Delegation** button, unless you wish to delete the delegation. Once you click this button, you will receive a warning message. Click the **OK** button to confirm the deletion. The [Processing Status](#) page will now display reviewing your deletion.

- You should use the enable checkbox (remove the tick) if you wish to just temporarily disable the delegation.
- Once you have deleted a delegation, you will still be able to see it on the Manage Delegations page (for historical purposes only).

In this mock-up form, click on the underlined name of a field or a button. A pop-up window appears with explanations and information on codes.

ADAM 260 - Update Delegation

Update Delegation

Delegate To	IDIR\JSMITH	View History
Delegated By	IDIR\AMCDONALD	
Grant Any Organization		
Organization	00096425 - MINISTRY OF AGRICULTURE AND FOOD	
Authorization Profile	IAPP_BIOLOGICAL_AGENT_MANAGER	
Effective Date	<input checked="" type="checkbox"/> Immediately	OR <input type="text"/> 
Expiry Date	<input checked="" type="checkbox"/> Never Expires	OR <input type="text"/> 
Delegation Enabled	<input checked="" type="checkbox"/>	
Comment	<input type="text"/>	

Update Delegation

Delete Delegation

Delegation History

Use: This page is used to display the history of a delegation.

Results: This page allows you to review the history of a specific delegation. This page shows details of the delegation as well as the date and time of the following actions:

- the **creation** of the delegation
- the **update** of the delegation
- the **deletion** of the delegation

Access the page: This page is displayed automatically once the **View History** link is clicked on the [Update Delegation](#) page.

How to: The top portion of the page displays rows of data corresponding to the actions which have been taken on the delegation. The bottom portion of the page is dynamic. It changes based on the row you have selected in the top portion of the page.

1

Select a row in the top portion of the page by clicking on the **Change Date** data for that row. The row will be highlighted in yellow.

2

Notice that the bottom portion of the page - the **Delegation History** - now changes to display the details of the row selected.



For example, if you click the row when the action is:

- **Create**, then you will be able to see the delegation details at the time of creation. (I.e. the expiry date was set to indefinitely)
- **Update**, then you will be able to see the delegation details for that update. (I.e. the update changed the expiry date to 2006-01-01)

Below is a screen print which shows a sample **Delegation History** page in ADAM.

Results 1 - 2 of 2.

Result Page: 1

Change Date	Action	Reason
2005-12-12 11:26:19	Update	
2005-12-07 15:56:06	Create	

Delegation History

Action: Update
Action Date: 2005-12-12 11:26:19
Action By: VIVIDSOLUTIONS\JREYNOLDS
Delegate To: JREYNOLDS
Delegated By: JREYNOLDS
Grant Any Organization: True
Authorization Profile: IAPP_BIOLOGICAL_AGENT_MANAGER
Effective Date: 2005-12-12
Expiry Date: 2006-01-01
Delegation Enabled: Yes
Comment:

Topic 4: Authorizations

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About Authorizations

What is an authorization?

An Authorization is the action of providing another user, or yourself, with the ability to perform specific functions within an application for a given organization or all organizations.

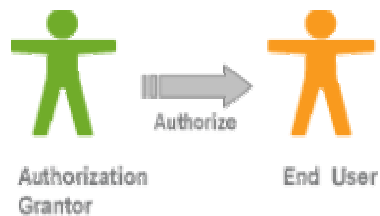
Confused about authorizations? The Scenario Flow Chart may help you better understand these.

Who can perform an authorization?

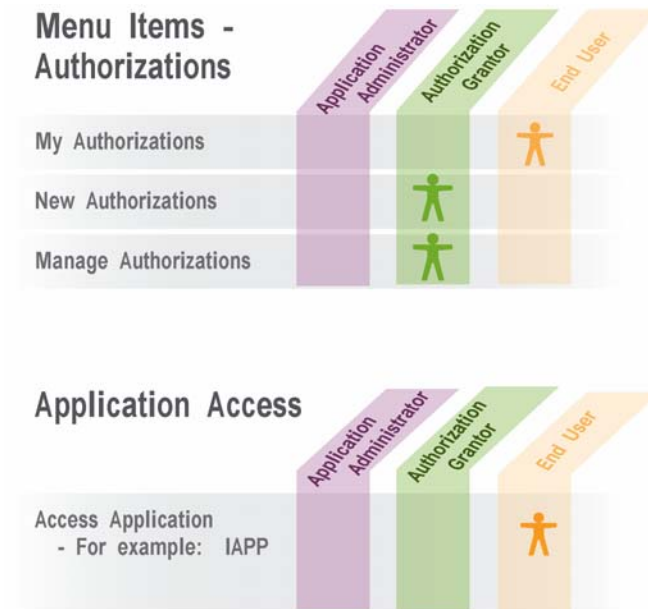
You must have a status of **Authorization Grantor** in ADAM in order to add an authorization. The individual receiving the authorization will become an End User of the authorized application. This user will also be able to view his/her authorization using the [My Authorizations](#) page in ADAM.

You may have been delegated the ability to manage authorizations for one or more applications; however, your ability to add authorizations for an application may be limited by:

- the organization you represent; and/or,
- the roles within the application you are allowed to grant (i.e. view vs. modify).



The following matrix describes the pages in ADAM that an Authorization Grantor has access to:



Why authorize?

Authorizations allow other individuals to access the application. Without these, the End Users will be unable to access the application.

For example...

For example, Jack Black is an **Authorization Grantor** for the **Invasive Alien Plants Program Application**. He works with the **Northern Weed Committee** and, therefore, has the ability to grant authorizations for this organization. In addition, he may only grant authorizations which are for the **IAPP Biological Manager** profile.

Jack knows that Clark Griswold requires this authorization right away. Therefore, Jack grants the following authorization to Clark:

- Grant User - CGRISWOLD
- Access to Profile - IAP_BIOLOGICAL_MANAGER
- For Organization - Northern Weed Committee
- Effective date - IMMEDIATELY
- Expiry date - NEVER EXPIRES
- Enabled - YES

Authorization Demonstrations



Add an Authorization

You can watch a demonstration of adding a new **Authorization** to ADAM by clicking the **Show Me** icon to the left.



Add a Batch Authorization

You can watch a demonstration of adding a new **Batch Authorization** to ADAM by clicking the **Show Me** icon to the left.



End User

You can watch a demonstration of an **End User** in ADAM by clicking the **Show Me** icon to the left.

My Authorizations

Use: This page is used to view authorizations which have been created for you in the ADAM Application. An Authorization allows you to perform a specific task in ADAM.

Results: This page displays all of your authorizations.

Access the page: To access this page:

- Select **My Authorizations** from the left navigation bar.

How to: This is a **view only** page which means you cannot modify or delete data on this page. You may only read data. There are two sections on this page:

- **Authorizations granted directly to me** - authorizations listed in this section are ones which were granted specifically to you.
- **Authorizations granted through group membership** - you received authorizations displayed here because you are a member of a group. Each member of that group received this authorization.

In this mock-up form, click on the underlined name of a field or a button. A pop-up window appears with explanations and information on codes.

ADAM 110 - My Authorizations

Authorizations enable a user to access one or more e-services.

Authorizations Granted Directly to Me		
Results 1 - 2 of 2.		
Results Page: 1		
Authorized Profile Name	Authorized Organization	Expiry Date
ADAM_APPADMIN		2006-01-30
ADAM_AUTHGRANTOR		9999-12-31

Authorizations Granted Through Group Membership		
Authorized Profile Name	Authorized Organization Name	Group Name
ADAM_USER	Northern Weed Committee	Public Users
ADAM_USER	Southern Weed Committee	User Group_South

New Authorization

Use: This page is used to add a new authorization to ADAM. An authorization allows you to authorize an **End User** (or yourself) to access and perform specific tasks/functions in a specified application for a specified organization.

An Authorization specifies a:

- User;
- Profile; and,
- Organization.

Note: A profile includes the application.

Results: A new authorization (**End User**) is created. The **End User** will receive an email detailing the authorization.

- Note: The End User's email address must be contained in his/her BCeID or IDIR User ID profile. This is NOT entered in ADAM.

Access the page:

To access this page:

- Select **New Authorizations** from the left navigation bar.

If the **New Authorizations** link is **NOT** visible in your left navigation bar then you are not authorized to add an authorization in ADAM. You must have the **Authorization Grantor** authority in ADAM to add authorizations.

How to:

Follow these steps to use this page:

1

Click the **New Authorization** link.

2

Enter the User ID of the user you wish to add an authorization for in the **Grant User** field. The User ID must be preceded by the domain (e.g. idir\jsmith). If you use the **Find User** button, the domain will be automatically entered for you.

Note: If you are having trouble finding a BCeID User, ensure the recipient of the Authorization has read BCeID Special Action.

3

Select the profile for this authorization using the **Access to Profile** field.

4

Specify the organization for this authorization using the **For Organization** field. This is the organization that the user will access the application on behalf of. Be sure you select an organization which is currently effective. See the [Organization Information](#) page if you are uncertain.

- If you are unable to access this field, it is due to the profile you have selected. The profile selected may not be secured by organization. For example, a **viewer** or **read only** profile is often not secured by organization because this profile is often meant to allow an End User to see data for all organizations in an application.
- If you are able to access this field, but the organization you require is **not** listed (or the field is blank), be sure you have accepted all required **Delegation Agreements**.

- 5 Enter the date you wish the authorization to come into effect using the **Effective Date** field.
 - If you would like the authorization to come into effect immediately, check the **Immediately** checkbox and do not enter an Effective Date.
- 6 Enter the date you wish the authorization to become void using the **Expiry Date** field.
 - If you would like the authorization to remain active indefinitely, select the **Never Expires** checkbox and do not enter an Expiry Date.
- 7 Click the **Enabled** checkbox to activate the authorization.
- 8 Enter any applicable notes in the **Comments** field.
- 9 Click the **Add Authorization** button.
 - You will receive an Authorization Processing Status page with the details of this authorization.



Group Authorizations

If you have been delegated the ability to create Group Authorizations, you will notice that this page contains a **Grant Type** field. You must select the radio button next to **Group** if you wish to create a group authorization.

The **Grant Group** field displays. Use this field to select the user group you wish to create the authorization for. Once the authorization has been completed, all members of this group will have this authorization.

In this mock-up form, click on the underlined name of a field or a button. A pop-up window appears with explanations and information on codes.

ADAM 120 - Create a New Authorization

Create a New Authorization
Switch to Batch Mode

Grant User	<input type="text"/>		Find User...
Access To Profile	<input style="border: 1px solid #ccc;" type="text"/> ▼		
For Organization	<input style="border: 1px solid #ccc;" type="text"/> ▼		Find...
Effective Date	<input type="checkbox"/> Immediately	or	<input style="border: 1px solid #ccc;" type="text"/>
Expiry Date	<input type="checkbox"/> Never Expires	or	<input style="border: 1px solid #ccc;" type="text"/>
Enabled	<input type="checkbox"/>		
Comment	<input type="text"/>		

New Authorization - Batch Mode

Use: As an **Authorization Grantor**, you can use this page to add a **Batch Authorization** to ADAM. Adding a batch authorization is similar to adding a single authorization, except, it allows for multiple authorizations to be added simultaneously.

An authorization allows you to authorize an **End User** (or yourself) to access and perform specific tasks/functions in a specified application for a specified organization.

An Authorization specifies a:

- User;
- Profile; and,
- Organization.

Note: A profile includes the application.

Note: When adding a Batch Authorization do not mix profiles which are secured by organization with those that are not secured by organization. See the Batch Authorization Profile tip.

Results: A new **Batch Authorization** is created in ADAM. The **End Users** will each receive an email detailing the authorization.

- Note: Each End User's email address must be contained in his/her BCeID or IDIR User ID profile. This is NOT entered in ADAM.

Access the page:

To access this page:

- Select **New Authorization** from the left navigation bar.
- Click **Switch to Batch Mode**.

If the **New Authorization** link is **NOT** visible in your left navigation bar then you are not authorized to add authorizations in ADAM. You must have the **Authorization Grantor** authority in ADAM to add authorizations.

How to: The steps below outline how to use this page if you wish to enter the Batch Authorization. Alternatively, you may upload a file containing the Batch Authorization data using the **Bulk Load Authorizations** section of this page.

- To bulk load authorizations, use the **Browse** button to locate the file and then click the **Submit** button. The file must match the specifications.

- 1 Click the **New Authorization** link.
- 2 Click the **Switch to Batch Mode** link.

Switch to Batch Mode

- 3 Enter the User ID(s) of the user(s) you wish to add an authorization(s) for in the **Grant User(s)** field. You must click the **Find User** link and locate users using the **User Search**. Then you may add each user. Visit the [User Search - Batch](#) help page for additional assistance.

- Once you return to the **Create a New Authorization (Batch Mode)**

page, you will notice that each user is highlighted in blue. If you wish to:

- De-select a user (the row is highlighted blue), click on the row of data containing that user. The row will no longer be highlighted.
- Select a user (the row is not highlighted), click on the row of data containing that user. The row will become highlighted.
- You can select multiple users by holding the "**Ctrl**" key on your keyboard while clicking each row.

Note: If you are having trouble finding a BCeID User, ensure the recipient of the Authorization has read BCeID Special Action.

4 Select the profile(s) for this authorization using the **Access to Profiles** field. (You can select and de-select each/multiple rows using the same method explained in Step #3.)

5 Specify the organization(s) for this authorization using the **For Organization** field. Be sure you select an organization(s) which is currently effective. See the [Organization Information](#) page if you are uncertain.

- If you are able to access this field, but the organization you require is **not** listed, be sure you have accepted all required **Delegation Agreements**.

(You can select and de-select each/multiple rows using the same method explained in Step #3.)

6 Enter the date you wish the authorization(s) to come into effect using the **Effective Date** field.

- If you would like the authorization(s) to come into effect immediately, check the **Immediately** checkbox and do not enter an Effective Date.

7 Enter the date you wish the authorization(s) to become void using the **Expiry Date** field.

- If you would like the authorization(s) to remain active indefinitely, select the **Never Expires** checkbox and do not enter an Expiry Date.

8 Click the **Enabled** checkbox to activate the authorization(s).

9 Enter any applicable notes in the **Comments** field.

10 Click the **Add Authorizations** button.

- You will receive an [Authorization Process Confirmation](#) page with the details of this authorization(s) for you to confirm.



Group Authorizations

If you have been delegated the ability to create Group Authorizations, you will notice that this page contains a **Grant Group(s): (Select Multiple)** field.

You may use this field to select one or multiple groups. (You can select and de-select each/multiple rows using the same method explained in Step #3.)

Once the batch authorization has been completed, all members of the selected group will have this authorization.

In this mock-up form, click on the underlined name of a field or a button. A pop-up window appears with explanations and information on codes.

ADAM 140 - Create a New Authorization (Batch Mode)

Create a New Authorization

[Switch to Simple Mode](#)

Grant User(s):
(Select Multiple)

[Find User...](#)

Access To Profiles: (Select Multiple)

IAPP_ADMINISTRATOR
IAPP_DATA_ENTRY
IAPP_PROGRAM_MANAGER

For Organization: (Select Multiple)

00096425 - MINISTRY OF AGRICULTURE AND FOOD
DSC - SUNSHINE COAST FOREST DISTRICT
HET - ECONOMICS AND TRADE BRANCH

[Find...](#)

Effective Date:

Immediately

OR



Expiry Date:

Never Expires

OR



Enabled

Comment

Bulk Load Authorizations

Upload Authorization:

Manage Authorizations

Use: As an **Authorization Grantor**, you can use this page to manage existing **End Users** in ADAM.

Results: This page acts like a search page. It allows you to search for existing authorizations. The authorizations display in the bottom portion of the page. From here, you will be allowed to:

- **View the authorization** - you may view all authorizations which match your search. For example, Application Administrators can view all authorizations.
- **Update the authorization** - you may update any authorization which matches your abilities/delegation as an Authorization Grantor. These will contain an **Edit** button rather than a **View** button.

If there is more than one Authorization Grantor with the same abilities/delegation, then both are able to view and update the authorizations.

Access the page:

To access this page:

- Select **Manage Authorizations** from the left navigation bar.

If the **Manage Authorizations** page is **NOT** visible in your left navigation bar then you are not authorized to manage authorizations in ADAM. You must have the **Authorization Grantor** authority in ADAM to manage authorizations.

How to: Follow these steps to use this page:

1

Click the **Manage Authorization** link.

2

Using the Authorization Query portion of the page, enter the criteria you wish to find authorizations for.

- **Note:** If you wish to examine all authorizations that you have access to, you may leave all fields blank.
- Remember, a profile is the type of role a user can have within an application. This determines the functionality a user can perform. Often a profile also affects the data that the user has access to.

3

Click the **Search** button.

4

Examine the authorizations in the bottom portion of the page.

- Click the **View** button to examine the details of the corresponding authorization.
- Click the **Edit** button to navigate to the [Update Authorizations](#) page. On this page you can modify the authorization.
- Click a **User ID** to navigate to the [User Information](#) page for that user.



Search Tips

On this page, you may enter partial values into the Grant User, Organization, and/or Authorization Profile fields. When you complete the search, your results will show all results which match those partial entries.

For example, if you enter "jsm" in the Grant User field, results would show all

authorizations you have access to for User ID's which contain "jsm" (i.e. jsmith, jsmythe, etc.).

In this mock-up form, click on the underlined name of a field or a button. A pop-up window appears with explanations and information on codes.

ADAM 130 - Manage Authorizations

Authorization Query

Grant Type User Group

Grant User [Find User...](#)

OR

Grant Group

Organization [Find...](#)

Authorization Profile [Find...](#)

Show Deleted?

Action	Authorized	Profile	For Organization	Deleted
<input type="button" value="Edit"/>	BREBEL	IAPP_BIOLOGICAL_AGENT_MANAGER	DCR - CAMPBELL RIVER FOREST DISTRICT	No
<input type="button" value="View"/>	BBUNNY	IAPP_PROGRAM_MANAGER	00012345 - MINISTRY OF AGRICULTURE AND FOOD	No

Associated Pages - Authorizations

Authorization Process Confirmation - Batch

- Use:** This page is used to confirm a Batch Authorization in ADAM.
- Results:** This page allows you to complete the Batch Authorization. The page shows any authorizations which were not approved as well as those which were approved.
- Access the page:** This page displays when you click the **Add Authorizations** button on the Batch Authorization page.

How to: Follow these steps to use this page to confirm the addition of the batch authorization:

- 1 Review the Batch Authorization. Pay close attention to the **Approved?** column. If this column contains:
 - Yes, then the corresponding Authorization has been approved.
 - No, then the corresponding Authorization has **NOT** been approved and will not be added to ADAM.
- 2 Examine the first column. This column contains a check mark for each approved Authorization. If you do not wish to add an authorization, click the box (to remove the tick).
- 3 Click the **Complete** button to add all authorizations which are approved and contain a tick in the first column.



If the authorization is **not** approved by ADAM, you can roll your mouse over the authorization (blue text) and an explanation is displayed.

The following are examples of unapproved authorizations:

- Your batch authorization includes authorizations for profiles which are secured by organization and those which are not secured by organization.
- The authorization you are attempting to create already exists in ADAM.

In this mock-up form, click on the underlined name of a field or a button. A pop-up window appears with explanations and information on codes.

ADAM 180 - Authorization Process Confirmation

The following authorizations are to be created:

	User	Profile Name	Organization	Approved?
<input checked="" type="checkbox"/>	IHULK	IAPP_DATA_ENTRY	Northern Weed Committee	Yes
<input checked="" type="checkbox"/>	CKENT	IAPP_DATA_ENTRY	Northern Weed Committee	Yes

Complete

Authorization Processing Status Batch

Use: This page is used to display the results of a Batch Authorization in ADAM.

Results: This page allows you to examine the details of the Batch Authorization.

Access the page: This page displays when you click the **Complete** button on the [Authorization Process Confirmation](#) page.

- How to:** There are two actions you may perform on this page.
- You may click the **Authorized To** name to navigate to the [User Information](#) page.
 - You may click the **OK** button to navigate directly to the [Manage Authorizations](#) page.

In this mock-up form, click on the underlined name of a field or a button. A pop-up window appears with explanations and information on codes.

ADAM 190 - Authorization Processing Status			
The following authorizations were created/updated:			
Authorized To	Profile Name	Organization	Success?
MPOPPINS	IAPP_DATA_ENTRY	Northern Weed Committee	Yes
BBUNNY	IAPP_DATA_ENTRY	Northern Weed Committee	Yes
RRIDINGHOOD	IAPP_DATA_ENTRY	Northern Weed Committee	Yes
<input type="button" value="OK"/>			

Authorization Processing Status

- Use:** This page is used to display the results of an Authorization.
- Results:** This page allows you to examine details of the Authorization.
- Access the page:** This page is displayed automatically once:
- the Add Authorization button is clicked on the [New Authorization](#) page; or,
 - the Update Authorization button is clicked on the [Update Authorization](#) page.
- How to:** There is only one action you may perform on this page. You may click the **OK** button to navigate directly to the [Manage Authorizations](#) page.

Below is a screen print which shows a sample authorization created in ADAM. Notice the following:

- The authorization was created by user = jreynolds;
- The authorization was for user = IAPPD_SWITCH. This user is now an End User;
- The organization is the Campbell River Forest District;
- The profile is IAPP_Biological_Agent_Manager;
- The authorization is effective from Dec 15 2005 and does not expire; and,
- The authorization is enabled.

ADAM150 - Authorization Processing Status

The following authorizations were created/updated:

Status: **Operation Completed Successfully**

Action: Create

Action Date: 2005-12-15

Action By: VIVIDSOLUTIONS\JREYNOLDS

Authorized To: VIVIDSOLUTIONS\IAPPD_SWITCH

Authorized By: VIVIDSOLUTIONS\JREYNOLDS

Organization: DCR - CAMPBELL RIVER FOREST DISTRICT

Authorization Profile: IAPP_BIOLOGICAL_AGENT_MANAGER

Effective Date: 2005-12-15

Expiry Date: 9999-12-31

Authorization Enabled: Yes

Comment: IAPPD_SWITCH can access IAPP as Bio Agent Manager for CR District

Update Authorization

Use: This page is used to modify an existing authorization.

Results: This page allows you to edit or delete an existing Authorization. In addition, you may view the history of an Authorization.

You may modify the following details of an Authorization:

- Effective Date
- Expiry Date
- Enabled Checkbox
- Comments

Access the page:

To access this page:

- Navigate to the **Manage Authorizations** page and search for the Authorization you wish to update.
- Click the **Edit** button next to the Authorization you wish to update.
- You will be navigated to this page (Update Authorization).
- Note: Please visit the [Manage Authorizations](#) help topic for additional information.

How to: Follow these steps to use this page to update an authorization:

1

Verify that you are updating the correct Authorization by examining the **Authorized To** and **Authorized By** fields.

2

Edit those fields which you wish to modify.

3

Click the **Update Authorization** button.



Do **not** click the **Delete Authorization** button, unless you wish to delete the authorization. Once you click this button, you will receive a warning message. Click the **OK** button to confirm the deletion. The [Processing Status](#) page will now display reviewing your deletion.

- You should use the enable checkbox (remove the tick) if you wish to just temporarily disable the authorization.
- Once you have deleted an authorization, you will still be able to see it on the [Manage Authorizations](#) page (for historical purposes only).

In this mock-up form, click on the underlined name of a field or a button. A pop-up window appears with explanations and information on codes.

ADAM 160 - Update Authorizations

Update Authorization

Authorized To IDIR\JSMITH

[View History](#)

Authorized By IDIR\AMCDONALD

Organization 00096425 - MINISTRY OF AGRICULTURE AND FOOD

Authorization Profile IAPP_BIOLOGICAL_AGENT_MANAGER

Effective Date Immediately OR 

Expiry Date Never Expires OR 

Enabled

Comment:

Authorization History

Use: Use this page to display the history of an authorization.

Results: Data shown allows you to review the history of a specific authorization. Details of the authorization as well as the date and time of the following actions are displayed:

- the **creation** of the authorization;
- the **update** of the authorization; and
- the **deletion** of the authorization.

Access the page: This page is displayed automatically once the **View History** link is clicked on the Update Authorization page.

How to: The top portion of the page displays rows of data corresponding to the actions which have been applied to the authorization. The bottom portion of the page is dynamic. It changes based on the row you have selected in the top portion of the page.

- 1 Select a row in the top portion of the page by clicking on the **Change Date** data for that row. The row will be highlighted in yellow.
- 2 Notice that the bottom portion of the page - the **Authorization History** - now changes to display the details of the row selected.



For example, if you click the row when the action is:

- **Create**, then you will be able to see the details of the authorization at the time of creation. (I.e. the initial expiry date would display)
- **Update**, then you will be able to see the details of that authorization for that update. (I.e. the update changed the expiry date to 2005-12-31)

Below is a screen print which shows a sample **Authorization History** page in ADAM.

Results 1 - 2 of 2.

Result Page: 1

Change Date	Action	Reason
2005-12-15 11:15:34	Update	Updated authorization to expire at end of 2005.
2005-12-15 08:57:12	Create	IAPPD_SWITCH can access IAPP as Bio Agent Manager for CR District

Authorization History

Action: Update
Action Date: 2005-12-15 11:15:34
Action By: VIVIDSOLUTIONS\JREYNOLDS
Authorized To: IAPPD_SWITCH
Authorized By: JREYNOLDS
Organization: DCR - CAMPBELL RIVER FOREST DISTRICT
Authorization Profile: IAPP_BIOLOGICAL_AGENT_MANAGER
Effective Date: 2005-12-15
Expiry Date: 2005-12-31
Enabled: Yes
Comment: Updated authorization to expire at end of 2005.

Topic 5: Agreements

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My Agreements.....	5-3
Manage Acceptance.....	5-4
Electronic Agreement Acceptance	5-6

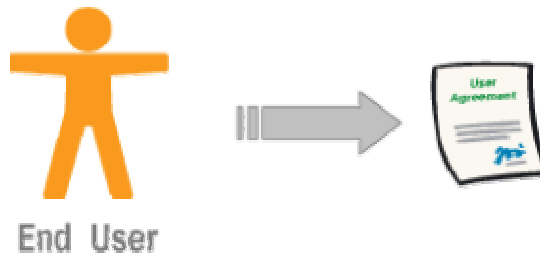
About Agreements

What is an agreement?

An Electronic Agreement is an agreement that a user must accept prior to being able to use an application.

There are two types of agreements you should be aware of:

- **User Agreement** - any user accessing a MoFR Web-ADE Application, **must** agree to a User Agreement. This agreement will be displayed the first time the user tries to log on to a MoFR Web-ADE Application. To learn more visit the About User Agreements page.
- At this time all User Agreements are **Global** for MoFR. This means you only need to accept the agreement once for all Web-ADE Applications which you have access to. ADAM does allow User Agreements to be **Application Specific**, but MoFR has decided not to use this function at this time.



- **Delegation Agreement** - ADAM Users who have been delegated as **Authorization Grantors** **may** need to agree to a Delegation Agreement prior to performing **authorizations** in ADAM . The agreement ensures that the user understands his/her responsibilities as an Authorization Grantor. To learn more visit the About Delegation Agreements page.
 - It is up to the discretion of the **Application Administrator** (who creates the delegation) to determine whether or not he/she requires the **Authorization Grantor** to agree to a **Delegation Agreement**. It is strongly recommended that consultants doing business on behalf of industry clients be required to accept a delegation agreement for each organization on whose behalf they do business.

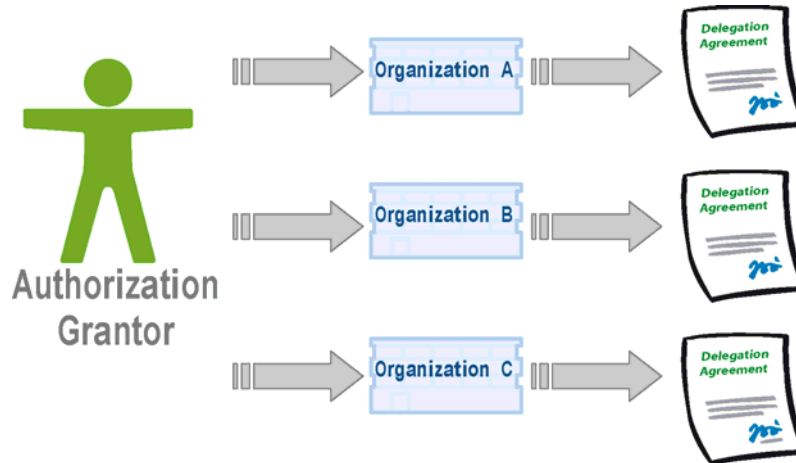


Agreements & Organizations

If you have been delegated as an **Authorization Grantor** for a **single** organization, then a single agreement is required.

However, if you have been delegated as an **Authorization Grantor** for **multiple** organizations, then an agreement for each organization is required.

Therefore, you may find it helpful to think of **Delegation Agreements** as **Organization Agreements**.



How do I know if I need to accept an Agreement?

You will be prompted with a **User Agreement** pop-up window the first time you log on to any MoFR Web-ADE Application.

An email is sent to notify you that you must accept the **Delegation Agreement**. This email is sent to the email address associated with your IDIR or BCeID account.

Where do I accept an agreement?

You will be prompted with a **User Agreement** pop-up window the first time you log on to any MoFR Web-ADE Application. You may accept the agreement from the pop-up window.

You must use ADAM to accept the **Delegation Agreement**.

Who can accept an agreement?

The agreement must be accepted by the user it is assigned to.

What happens if an agreement is NOT accepted?

If an agreement is NOT accepted, the user will be unable to perform tasks associated with the agreement.

My Agreements

Use: This page is used to review your E-Agreements. From this page, you can accept **Delegation Agreements** in ADAM.

Results: All of your Electronic Agreements are displayed.

Access the page: You may access this page by clicking the **My Agreements** link from the left navigation.

How to: Follow these steps to use this page:

- 1 Review the summary of your agreements. Pay close attention to the **Accepted** column.
 - If a date appears in this column, then you have accepted the corresponding agreement (on that row).
 - If a date does not appear in this column, then you need to accept the corresponding agreement (on that row). The word **unaccepted** will be displayed. If you do not accept the agreement, the corresponding delegation/authorization will not be accessible to you.
- 2 You can examine the details of a specific agreement by clicking on the **Agreement Name**. You are navigated to the **Electronic Agreement Acceptance** page.
 - Visit the [Electronic Agreement Acceptance](#) help page for additional assistance with this page.

In this mock-up form, click on the underlined name of a field or a button. A pop-up window appears with explanations and information on codes.

ADAM 310 - My Electronic Agreements

Electronic Agreements are used to verify your acceptance of an e-services Terms of Use. Please read all agreements carefully before accepting.

Results 1 - 2 of 2.

Results Page: 1

Name	Organization	Accepted	Type
IAPP Delegation Agreement	Bedrock Inc.	2005-12-07	ORG
MAX Delegation Agreement	ACME	2006-01-01	ORG

Manage Acceptance

Use: This page is used to search for and review Electronic Agreements in ADAM. From this page, you can select the Delegation Agreement you wish to accept (provided the agreement is assigned to you).

Results: Electronic Agreements are displayed based on the search criteria entered. Agreements displayed include both those which have and have not been accepted.

Access the page: You may access this page by clicking the **Manage Acceptance** link from the left navigation. This page can be accessed by all users except for an End User.

How to: Follow these steps to use this page:

- ① Enter your search criteria using the following:
 - User ID
 - Organization
 - Acceptance Agreement
- ② Click the **Start Query** button to perform the search.
- ③ All agreements, matching your search criteria, are displayed in the bottom portion of the page.
 - Both agreements which have and have **NOT** been accepted are displayed.
- ④ You may click:
 - A **User Name** to examine additional details about a user. The User Information page is displayed.
 - An **Agreement Name** to examine additional details about the agreement. The Electronic Agreement Acceptance page is displayed.


In this mock-up form, click on the underlined name of a field or a button. A pop-up window appears with explanations and information on codes.

ADAM 340 - Manage Agreements Acceptance

Query By User

User ID [Find User...](#)

Organization [Find...](#)

Acceptance Agreement 

Results 1 - 2 of 2.

Results Page: 1

User	Name	Organization	Accepted
FFLINTSTONE	IAPP Delegation Agreement	Bedrock Inc.	2005-12-10
MMOUSE	FTA Delegation Agreement	Bedrock Inc.	2005-12-02

Electronic Agreement Acceptance

Use: This page is used to review the text of a single Delegation Agreement and/or accept that Electronic Agreement in ADAM.

Results: A single Electronic Agreement is reviewed and/or accepted.
If the agreement has already been accepted, you will notice:

- An **Acceptance Date** displays to the right of the Agreement Name; and,
- The **I Agree** button does **NOT** display.

Access the page: You may access this page by clicking on an Agreement's Name from the My Agreements page or Manage Acceptance page.

How to: Follow these steps to use this page:

- 1 Review the agreement. If the agreement has already been accepted, you may click the **Return to Manage Agreements Acceptance** button. This will return you to the Manage Agreements page.
- 2 If the agreement has not been accepted, you may click the **I Agree** button to accept the agreement.



To learn more...

- Visit the About Delegation Agreements page to learn more about Organization Agreements.
- Visit the About User Agreements page to learn more about User Agreements.

In this mock-up form, click on the underlined name of a field or a button. A pop-up window appears with explanations and information on codes.

ADAM 370 - Electronic Agreement Acceptance

Delegation

The Agreement Text will appear here.

I Agree

Return to Manage Agreements Acceptance

Topic 6: Search & Information Display

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About Searching

Why Search?

Searching allows you to find a specific user, organization, or profile.

User Searches

You may have noticed that there are two user searches. These are very similar in nature. The only exception is that the batch search allows you to easily search and add multiple users to Batch Delegations & Authorizations.

Organizational Searches

There are also two organizational searches. One is used for Batch Delegations.

Profile Search

There is only one profile search. This is helpful if you need to find a specific profile in ADAM.

What are the User Information & Organizational Information pages for?

User Information

This page allows you to find out additional details about a specific user. For example, you can learn whether the person is an employee of MoFR or not, his/her contact information, etc.

Organizational Information

This page is useful if you need to find out an organization's client number or full name. In addition, it includes a description of the organization. This page may be most often used to determine if the organization is active by examining the effective and expiry dates.



The **Client Number** is displayed in ADAM from the **CLIENT Application**.

This number does not include the location code. The CLIENT Application is another web-based application managed by the MoFR.

The **Organization ID** displayed in ADAM is a unique ID for the organization. This ID is created and used in the ADAM Application.

User Search

Use: This page is used to find a user in ADAM. The criteria entered is queried against the BCeID and IDIR directories (authentication systems) to check for a match.

Results: This page allows you to search for a user using various data you may have.

You may search by:

- User ID
- First Name
- Last Name
- User Type

You may also search using a combination of the above.

Access the page: You may access this page by clicking the **Find User** link. This link appears on many pages in ADAM. For example, you can find this link on the [Create a New Delegation](#) page.

How to: Follow these steps to use this page to find a user:

- 1 Enter/select the **User ID**, **First Name**, **Last Name** and/or **User Type**. You may enter one, some, or all of these fields.
- 2 Click the **Search for User** button.
- 3 The results of the search are displayed below the search field. Click on the **User ID** or **Name** to select the user. You will automatically be returned to the previous page.



Using Wildcards

This search page is unique in that the **First Name**, **Last Name**, and **User Type** fields are **wildcarded** at the end. This is helpful if you do not know the full text you wish to enter into a field.

For example, if you are searching for a user, and you are unsure if his name is "Dave" or "David" you could simply enter "Dav" in the **First Name** field.

Your search would return all first names which started with "Dav". However, you could **not** enter just "av". This would return all first names starting with "av" rather than all first names which contained "av".

In this mock-up form, click on the underlined name of a field or a button. A pop-up window appears with explanations and information on codes.

ADAM 610 - User Search

User ID

First Name

Last Name

User Type ▼

Results 1 - 1 of 1

Result Page: 1

User ID	Name	Phone Number	Email
FFLINTSTONE	Fred Flintstone	250-123-1234	fflintstone@gov.ca

User Search - Batch

Use: This page is used to find a user in ADAM when you are in batch mode.

Results: This page allows you to search for a user using various data you may have.

You may search by:

- User ID
- First Name
- Last Name
- User Type

You may also search using a combination of the above.

Access the page: You may access this page by clicking the **Find** link. This link appears on the Create a New Delegation - Batch Mode page.

How to: Follow these steps to use this page to find a user:

- 1 Enter/select the **User ID, First Name, Last Name** and/or **User Type**. You may enter one, some, or all of these fields.
- 2 Click the **Search for User** button.
- 3 The results of the search are displayed below the search field. To select a user, you should click the checkbox (a tick appears) next to the user name.
- 4 Next, click the **Add Selected** button.
- 5 You may now use the search fields to search for another user by following Steps #1 - #4 again. Continue to repeat these steps until you have selected each user you wish to add to the batch process.
- 6 Once you have selected your last user, click the **Add Selected and Exit** button. You will be returned to the previous page with all users populating the **Allow Users** field.

Using Wildcards

This search page is unique in that the **First Name, Last Name, and User Type** fields are **wildcarded** at the end. This is helpful if you do not know the full text you wish to enter into a field.

For example, if you are searching for a user, and you are unsure if his name is "Dave" or "David" you could simply enter "Dav" in the **First Name** field.

Your search would return all first names which started with "Dav". However, you could **not** enter just "av". This would return all first names starting with "av" rather than all first names which contained "av".

In this mock-up form, click on the underlined name of a field or a button. A pop-up window appears with explanations and information on codes.

ADAM 620 - User Search

User ID

First Name

Last Name

User Type ▼

Results 1 - 1 of 1

Result Page: 1

Select	User ID	Name	Phone Number	Email
<input checked="" type="checkbox"/>	FFLINTSTONE	Fred Flintstone	250-123-1234	fflintstone@gov.ca

User Information

Use: This page is used to display details of a user.

Results: This page allows you to review a user's contact information. The page will differ slightly depending on whether the user has an IDIR or BCeID.

Access the page: This page is displayed automatically once the **User ID** is clicked on the [Update Delegation](#) page, [Update Authorization](#) page, [Manage Delegations](#) page, [Manage Authorizations](#) page, and [Manage Agreements Acceptance](#) page.

How to: There is only one action you may perform on this page. You may click the **Close** button to close the page and return to the previous page.



Note that the **Expiry Date** field is set in the Authentication System (the BCeID or IDIR directory). This date can **not** be changed in ADAM.

Below is a screen print which shows sample **User Information** pages in ADAM. The IDIR User Information page will display the email address and phone number if it is available.

This is a sample IDIR User Information Page

The screenshot shows a window titled "ADAM710 - User Information" with a blue header bar. Below the header, the following user information is displayed:

- User Id:** IDIR\APPADMIN
- User Name:** Vicki Baleshta
- Display Name:** Baleshta, Vicki (APPADMIN)
- Source Directory:** IDIR
- Is Employee:** No
- Email Address:**
- Phone Number:**
- Expiry Date:** 9999-12-31

At the bottom center of the window is a "Close" button.

This is a sample BCeID User Information Page

ADAM710 - User Information

User Id: BCEID\BCUSER1
User Name: Vicki J Baleshta
Display Name: Baleshta, Vicki J
Source Directory: BCEID
Business Legal Name: Ministry of Forests (Production Test)
Email Address: vicki.baleshta@gov.bc.ca
Phone Number: 2503878445
Expiry Date: 9999-12-31

Close

Organization Search

Use: This page is used to find an organization in ADAM. The page searches Forest Clients and MoFR Organizational Units.

Results: This page allows you to search for an organization using various data you may have.

You may search using either:

- Organization Name; or,
- Organization Type.

You may also search using both fields.

Access the page: You may access this page by clicking the **Find** link next to the **To add authorizations for...** field. This link appears on many pages. For an example see the [Create a New Delegation](#) page.

How to: Follow these steps to use this page to find an organization:

- 1 Enter the **Organization Name** and/or select the **Organization Type**. You may enter one or both of these fields.
- 2 Click the **Search for Organization** button.
- 3 The results of the search are displayed below the search field. Click on the **Organization User ID** or **Organization Name** to select the organization. You will automatically be returned to the previous page.

In this mock-up form, click on the underlined name of a field or a button. A pop-up window appears with explanations and information on codes.

ADAM 650 - Organization Search

Organization Name

Organization Type

Results 1 - 1 of 1

Result Page: 1

Organization ID	Organization Name	Description
123456	00011111 - Northern Weed Committee	Dawson Creek, BC

Organizational Search - Batch

Use: This page is used to find an organization in ADAM when you are in batch mode.

Results: This page allows you to search for an organization using various data you may have.

You may search using either:

- Organization Name; or,
- Organization Type.

You may also search using both fields.

Access the page: You may access this page by clicking the **Find** link next to the **To add authorizations for...** field. For example, this link appears on the [Create a New Delegation - Batch](#) page.

How to: Follow these steps to use this page to find an organization:

- 1 Enter the **Organization Name** and/or select the **Organization Type**. You may enter one or both of these fields.
- 2 Click the **Search for Organization** button.
- 3 The results of the search are displayed below the search field.
 - Click on the **check box** (a tick appears) corresponding to the row which contains the organization you wish to select.
 - If you wish to select multiple organizations, you may click multiple check boxes.
- 4 Once you have selected the check box next to each organization you wish to add, click the **Choose Selected** button. This button is at the very bottom of the organization list, so you may need to scroll through the page to find it.
- 5 The **Organization Search - Batch** page will close and you will be returned to the previous page. All organizations selected will be displayed in the appropriate field.

In this mock-up form, click on the underlined name of a field or a button. A pop-up window appears with explanations and information on codes.

ADAM 660 - Organization Search

Organization Name

Organization Type ▼

Results 1 - 1 of 1

Result Page: 1

Select Organization User ID	Organization Name	Description
<input checked="" type="checkbox"/> 123456	00011111 - Northern Weed Committee	Dawson Creek, BC
<input checked="" type="checkbox"/> 789123	00022222 - Southern Weed Committee	Victoria, BC

Organization Information

Use: This page is used to display details of an organization.

Results: This page allows you to review an Organization's ID, Name, Description, Type, Effective & Expiry Dates.

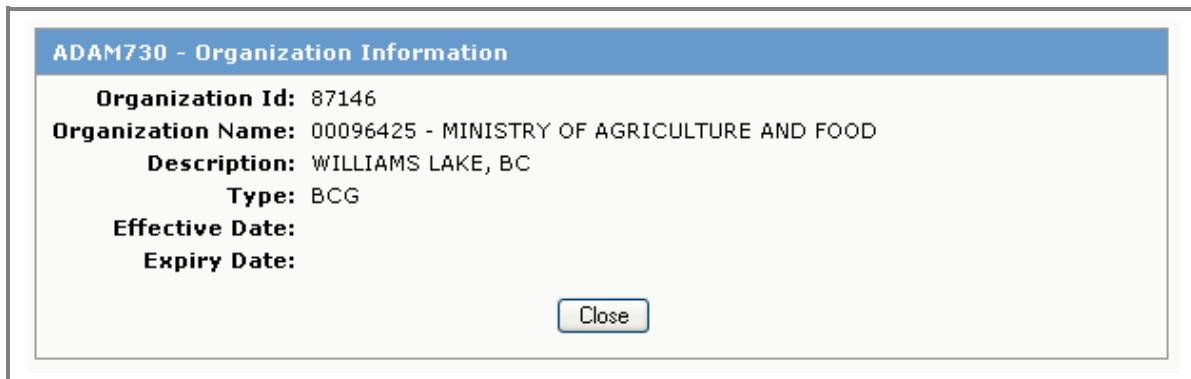
Access the page: This page is displayed automatically once the organization is clicked on various pages in ADAM. For an example see the [Update Delegation](#) page or [Update Authorization](#) page.

How to: There is only one action you may perform on this page. You may click the **Close** button to close the page and return to the previous page.



Note that the Organization's Effective and Expiry Dates are set by the ADAM Application Administrator. You can **not** change these at this time.

Below is a screen print which shows a sample **Organization Information** page in ADAM.



Profile Search

Use: This page is used to find a profile in ADAM.

Results: This page allows you to search for a profile using various data you may have. You may search using either:

- Profile Name; or,
- Application.

You may also search using both fields.

Access the page: You may access this page by clicking the **Find** link next to the **Authorization Profile** field found on many pages in ADAM. For an example see the [Manage Authorizations](#) page.

How to: Follow these steps to use this page to find a profile:

- 1 Enter the **Profile Name** and/or select the **Application**. You may enter one or both of these fields.
- 2 Click the **Search for Profile** button.
- 3 The results of the search are displayed below the search field. Click on the **Application, Profile Name, or Description** to select the profile. You will automatically be returned to the previous page.

In this mock-up form, click on the underlined name of a field or a button. A pop-up window appears with explanations and information on codes.

ADAM 670 - Profile Search

Profile Name Search for Profile

Application ▼

Results 1 - 1 of 1

Result Page: 1

Application	Profile Name	Description
IAPP	IAPP_ADMINISTRATOR	IAPP Administrator
IAPP	IAPP_BIOLOGICAL_AGENT_MANAGER	IAPP Biological Agent Manager
IAPP	IAPP_DATA_ENTRY	IAPP Data Entry
IAPP	IAPP_PROGRAM_MANAGER	IAPP Program Manager
IAPP	IAPP_VIEWER	IAPP Viewer