



Corporate Modeler  
***Access Rights & Power Levels***

Reference Guide

# Contents

Key Principles and Overview .....	1
What are Access Rights?.....	2
What are Power Levels? .....	2
What is Ownership? .....	3
What is a locked model? .....	3
What are Freeze levels? .....	3
How To .....	3
"Who can do what" .....	5
What can Read-only Users (RO) do?.....	6
Work with Models .....	7
Work with Users and User Groups.....	9
Work with Subject Areas .....	11
Work with modeling objects .....	13
Work with design objects.....	16
Work with template objects and template diagrams .....	19
Work with Corporate Modeler Preferences .....	20
Work with Export and Import .....	22
Work with sub-models.....	25
General conditions that prevent access to objects in a model.....	27
Work with modeling objects .....	27
Work with design objects (including templates) .....	28
Glossary of terms .....	29
Appendix .....	32
Appendix A: Access Rights dialog.....	32
Appendix B: Associations and access rights.....	34
Appendix C: Why Categories are excluded when the model design is frozen.....	35
Appendix D: Examples of when you cannot import into an existing model .....	36
Appendix E: Automodeler and Access Rights .....	37

## Chapter 1

# Key Principles and Overview

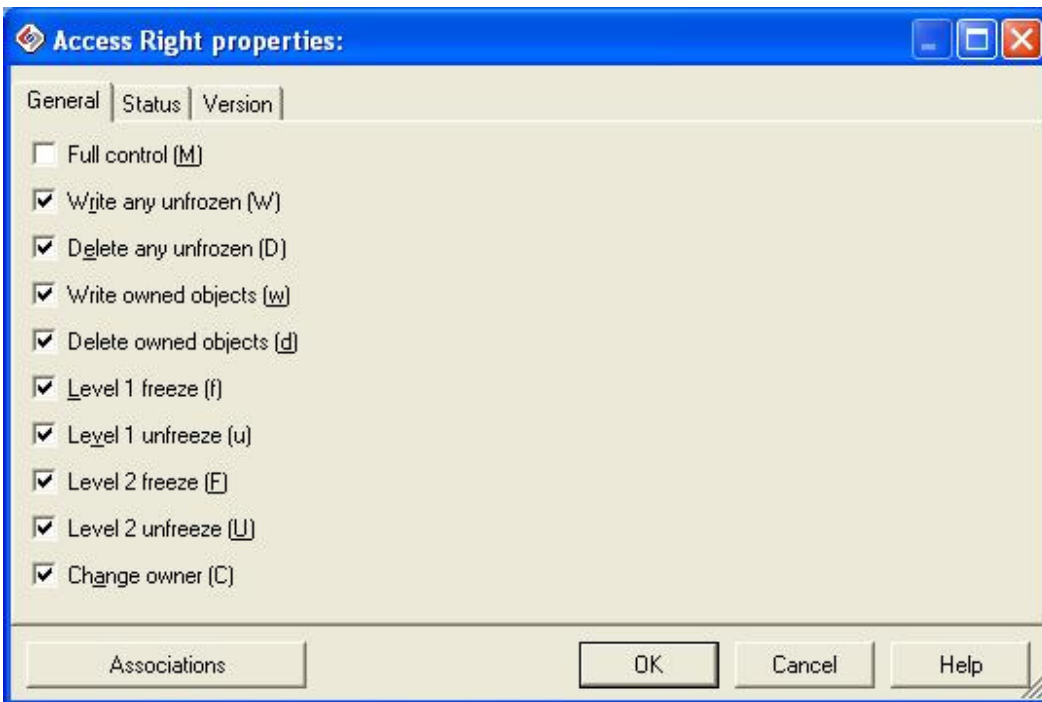
In this chapter, we look at the key concepts and general principles underlying Access Rights and Power Levels. For Quick Reference tables showing who can do what, go to chapter 2.

## What are Access Rights?

When a model is created, no other user (except System Managers) can see that model when they log on to Corporate Modeler. As Users have to be explicitly granted **access rights** to each model before work can commence (each user has to be associated with each model in the Administration view of Model Explorer).

**Access rights** (or permissions) restrict what a user can do to the objects and design objects in that model.

Such rights are granted on this dialog:



These access rights affect objects within models. They do not affect models themselves (except for the "Full Control" right). Neither do they affect Subject Areas, Users, or User Groups, which are so-called Administration objects. These are not stored in any one model and are maintained in the Model Explorer Administration View. For an explanation of each option on the dialog above, see Appendix A.

A user who *creates* a model *owns* that model and so automatically has full access rights to the model and all the objects within it. The access right "Full Control" assigns the same rights as ownership to the user or user group whose rights are currently being edited.

In short, think of access rights as determining how a user can interact with objects within a model.

## What are Power Levels?

As a Corporate Modeler user you are assigned a "Power Level", this "Power Level" defines what you are allowed to do in Corporate Modeler.

There are four Power Levels or "types of user" as follows:

- System Manager (SM)
- Project Manager (PM)
- Normal user (NU)
- Read-only user (RO)

Generally, the higher the power level, the more access rights that user has to a model. However, access rights are fully configurable (as we saw in the previous section) and so it is possible to give an NU effectively the same rights to a model as an SM or PM.

A user's Power Level is more significant when it comes to working with Administration objects (i.e. Users, Groups, and Subject Areas). Because these objects are not limited to any one model, access rights do not apply.

So, for example, a NU can never create other Users and cannot normally create or populate Subject Areas. Neither can they normally create models (although an SM can explicitly allow NUs to create both Subject Areas and models by setting options on the Systems Options dialog.

In short, think of a user's power level as determining primarily how he or she can work at the model level or with Administration objects.

## How being in a User Group affects Access Rights and Power Levels

If Users are in a User Group, they inherit the access rights assigned to that Group. However, if they also have higher access rights that were assigned independently, then those higher rights apply.

Similarly, a user's power level overrides the access rights of a Group he or she maybe in. For example, SMs always have freeze and unfreeze rights even if the Group they are in does not. (this is because an SM automatically has full rights to a model).

## What is Ownership?

A user owns something (whether it be a model, object or administration object) if he or she creates it. Ownership gives full rights to that create, edit and delete that model or object.

You can give a user who did not create an object, equivalent access rights by assigning them the access right "Full Control".

## Changing ownership

- Ownership of modeling objects can be changed if a user has the access right "Change owner".
- Ownership of models can be changed only by model owners (or those with "Full Control" rights).
- Ownership of administration objects can be changed only by owners of those objects.

## What is a locked model?

When a model is locked, all users (except SMs and the person who locked the model) are unable to see the model and so are unable to work on it.

An SM and the person who locked the model can continue to see this model and can also unlock it.

## A special note on template models

If a template model is locked, then no other user, including SMs, can see that model.

## What are Freeze levels?

Freezing objects in your model prevents users from being able to edit their properties (disables the fields in the properties dialog for any frozen object). Select either Freeze Level 1 or Freeze Level 2 to freeze the properties of objects.

The Freeze Level number does not set a different freeze level (i.e. it does not mean that different users see the objects as frozen depending on which freeze level is set). The freeze level number defines which users are able to UNFREEZE the objects once they have been frozen.

For example: The system contains two users, Admin and Manager. Admin has Freeze Level 1 and Manager, Freeze Level 2. If Admin sets an object to Freeze Level 1, both will see this object as frozen (they will not be able to edit its properties), but only Admin can unfreeze the object, Manager cannot (Manager can only unfreeze objects which have Freeze Level 2).

## How To

You can find complete detailed instructions for how to set up Uses and Groups and assign these to models in the online help.

1. Launch the help
2. Click the "Show" button at the top of the help viewer

3. In the Table of Contents, expand **Manage Corporate Models**, then **Set up a multi-user installation**, and then click **Set users, user groups, and access rights**.

## Chapter 2

# "Who can do what"

In this chapter, we look at what you should expect each user to be able to do to each object depending upon their Power Level and the access rights that they have been assigned.

## What can Read-only Users (RO) do?

Read-only users can only do the following:

### Create Issues and Issue Templates

To do this, they must have "Write any unfrozen" or "Write owned objects" access rights (as shown in the next section)

They can also associate any object to these Issues.

### Delete Issues

If they have "Delete owned objects", then they can delete those Issues that they created.

If they have "Delete any unfrozen", then they can delete any Issue object in the model.

### Update Issues

If they have "Write owned objects", then they can update Issues they created.

If they have "Write any unfrozen", then they can update any Issue in the model.

### Export models and Administration objects

Any Read-Only user can use the Export wizard to export a model and/or just the Administration objects. Such users, however, will not be able to import this model anywhere.



## Work with Models

### Introduction

This section refers to what users can do to models themselves (as opposed to what users can do to the objects within the model).

How a user can work with models is determined primarily (but not exclusively) by the user's **Power Level**. NUs cannot normally create, edit, or delete models, although they can be explicitly granted this right (see "System Options" below).

### Ownership

Once a user has created a model, he or she owns it, and has full access rights for that model. In addition, a user can be given the "Full Control" access right (on the Access Rights dialog), which confers the equivalent rights as ownership (this right can be assigned to users of any Power Level except Read-Only users).

### System Options

Both SMs and PMs can always create models. An NU must have the right explicitly granted. This can only be done by SMs in the Administration view: Tools > System Options.

Note that this right cannot be granted to individual users, only to all NUs.

For more about System Options and other Corporate Modeler "preferences", see "Work with Corporate Modeler Preferences" later in this chapter.

### General conditions

- No user can work on a model if it is frozen, although a user with appropriate rights can unfreeze a model.
- No user can work on a model locked by another user (PMs and NUs cannot even see such models).
- An SM can unlock models locked by other users.

## Quick Reference

<b>Action</b>	<b>System Manager (SM)</b>	<b>Project Manager (PM)</b>	<b>Normal User (NU)</b>
Create Models	Yes	Yes	No, unless <b>all</b> users have been explicitly granted this right via the System Options.
Edit Models	Yes	No, unless the user owns the model or has been assigned the Full Control access right to this model.	No, unless the user owns the model or has been assigned the Full Control access right to this model.
Delete Models	Yes	No, unless the user owns the model or has been assigned the Full Control access right to this model.	No, unless the user owns the model or has been assigned the Full Control access right to this model.
Freeze/Unfreeze Models	Yes	No, unless the model is locked and the user either: owns the model or has been assigned the full control access right.	No, unless the model is locked and the user either: owns the model or has been assigned the full control access right.
Set a Model as a Template	Yes	No, unless the user owns the model or has been assigned the Full Control access right to this model.	No, unless the user owns the model or has been assigned the Full Control access right to this model.
Lock Models	Yes	No, unless the user owns the model or has been assigned the Full Control access right to this model.	No, unless the user owns the model or has been assigned the Full Control access right to this model.
Unlock Models	Yes	No, unless the model is locked and the user either: owns the model or has been assigned the Full Control access right to it.	No, unless the model is locked and the user either: owns the model or has been assigned the Full Control access right to it.
Change the owner of models	Yes	No, unless the user owns the model or has been assigned the Full Control access right to this model. (See note 2).	No, unless the user owns the model or has been assigned the Full Control access right to this model. (See note 2).
Assign Models to Users and Groups	Yes	No, unless the user assigning rights to the model is associated with the model themselves.	No, unless the user owns the model or has been assigned the Full Control access right to this model.
Edit the access rights of users or groups that are already assigned to a model	Yes	No, unless and the user is the owner of the access rights object (see note 1) and either: owns the model or has been assigned the Full Control access right.	No, unless and the user is the owner of the access rights object (see note 1) and either: owns the model or has been assigned the Full Control access right.

## Notes

1. The access rights object is the intersection object between the user and the model, created when you create the association. The most likely reason for being the owner of this object is that you created the association between the user object and model object in the first instance (thus creating the intersection object).

2. The access right "Change owner" does not apply to models, only to objects within the model.

## Work with Users and User Groups

### Introduction

Users and User Groups are known as "Administration objects", that is, they are Corporate Modeler objects that are not specific to any one model.

They are created and maintained in the Administration view of Model Explorer.

How a user can work with User and User Group objects is determined primarily by the user's **Power Level**. NUs cannot create, edit, or delete User or Group objects.

*Because User and User Group objects are not limited to any one model, the options on the Access Rights dialog do not apply.*

### General conditions

Once users create a User or User Group, they own it, and can then edit and delete it as long as it is not frozen.

NUs cannot create Users or User Groups.

### Relationship between Users and User Groups

If users are part of a User Group, then they always inherit the highest level of access rights that have been granted either explicitly or implicitly by virtue of their Power Level.

For example, suppose you are a System Manager who is part of a User Group that does not have any freeze level rights to a model. However, in your capacity as System Manager, you will still have full access rights to that model and so be able to freeze the model and objects in it.

If you have been granted one set of rights as an individual user and another set of rights as part of a User Group, you inherit the highest access right. So, for example, if you have Write rights as an individual, you can create and update objects. If, as an individual, you cannot freeze objects, but as part of a User Group, you can, then you will be able to freeze objects.

In other words, the user inherits the highest level of access right from both the individual settings and the User Group settings.

## Quick Reference

<b>Action</b>	<b>System Manager (SM)</b>	<b>Project Manager (PM)</b>	<b>Normal User (NU)</b>
Create Users	Yes	Yes, but they cannot set the Power Level of the new user to be higher than Project Manager.	No
Create User Groups	Yes	Yes	No
Update Users and User Groups (see note 2)	Yes	Only those they own.	No
Change a User's Power Level	Yes	No	No
Delete Users and User Groups	Yes	Only those they own.	No
Freeze/Unfreeze Users and User Groups	Yes	Only those they own.	No
Assign / Unassign Users to User Groups	Yes	Users of any Power Level to User Groups that they own	No
Assign Models to Users and Groups	Yes	No, unless the user assigning rights to the model is associated with the model themselves.	No, unless the user owns the model or has been assigned the Full Control access right to this model.
Edit the access rights of users or groups that are already assigned to a model	Yes	No, unless and the user is the owner of the access rights object (see note 1) and either: owns the model or has been assigned the Full Control access right.	No, unless and the user is the owner of the access rights object (see note 1) and either: owns the model or has been assigned the Full Control access right.
Change the ownership of Users and Groups	Yes	Only those they own.	No

## Notes

1. The access rights object is the intersection object between the user and the model, created when you create the association. The most likely reason for being the owner of this object is that you created the association between the user object and model object in the first instance (thus creating the intersection object).
2. All users, except Read-Only users, are able to use the Administration view in Model Explorer to edit the password for their own user account.

## Work with Subject Areas

### Introduction

Subject Areas are "Administration objects", that is, they are Corporate Modeler objects that are not specific to any one model. They are created and maintained in the Administration view of Model Explorer.

The user's Power Level determines how a user can work with Subject Area objects. NUs cannot normally create, edit, delete, or populate Subject Area objects, although this right can be explicitly granted (see "System Options" below).

### System options

Both SMs and PMs can always create and populate Subject Areas. An NU must have the right explicitly granted. This can only be done by SMs in Model Explorer's Administration view: Tools > System Options.

Note that this right cannot be granted to individual NUs, only to all NUs.

### General conditions

Once users create a Subject Area object, they own it, and can then edit and delete it as long as it's not frozen.

However, a User can still add objects to a frozen Subject Area.

## Quick Reference

<b>Action</b>	<b>System Manager (SM)</b>	<b>Project Manager (PM)</b>	<b>Normal User (NU)</b>
Create Subject Areas	Yes	Yes	No, unless all NUs have been explicitly granted this right via System Options.
Update Subject Areas	Yes	Only those they own	No, unless all NUs have been explicitly granted this right via System Options and the user owns the Subject Area object.
Delete Subject Areas	Yes	Only those they own	No, unless all NUs have been explicitly granted this right via System Options and the user owns the Subject Area object.
Freeze/Unfreeze Subject Areas	Yes	Only those they own	No, unless all NUs have been explicitly granted this right via System Options and the user owns the Subject Area object.
Add / remove objects to / from Subject Areas	Yes	Yes	No, unless all NUs have been explicitly granted this right via System Options.
Change the ownership of Subject Areas	Yes	Only those they own	No, unless all NUs have been explicitly granted this right via System Options and the user owns the Subject Area object.

## Work with modeling objects

### Introduction

A Modeling object is an object that represents a "real-world" feature of your business process or of your system.

For example: you may have a number of "Process" objects in the repository called things like: 'Record Order', 'Pick Goods' and 'Make Payment'. These objects (derived from the design object "Process") are modeling objects.

The following tables present the **different** access rights for:

1. Diagram independent objects – i.e. objects (such as Processes or Associations) that can be seen in Model Explorer and added to more than one diagram.
2. Diagram dependent objects – i.e. objects (such as Connectors and Free Text) that only appear on a single diagram and cannot be re-used across the model.

### Ownership

A user who owns a model has full access rights to that model and so can always create, edit, or delete modeling objects. The access right "Full Control" confers the same rights as though the user owned the model.

Otherwise, how users can work with modeling objects is determined primarily by what access rights have been assigned to them.

### Access Rights

For users who do not own a model, what they can do depends on the specific access rights that are assigned on the Access Rights dialog. For example, "Write owned only" allows users to create objects and update those objects but not to edit any other object in the model.

For a complete description of each option, see Appendix A "The Access Rights dialog".

### General conditions

There are also some general conditions that prevent the creating, editing, and deleting of objects. See chapter 3.

## Quick Reference

### Diagram independent objects

<b>Action</b>	<b>System Manager (SM)</b>	<b>Project Manager (PM)</b>	<b>Normal User (NU)</b>
Create objects	Yes	No, unless: <b>Write any unfrozen</b> and object / model is unfrozen Or <b>Write owned objects</b> and the user owns the object Or <b>Full Control</b> is granted.	No, unless: <b>Write any unfrozen</b> and object / model is unfrozen Or <b>Write owned objects</b> and the user owns the object Or <b>Full Control</b> is granted
Edit objects (see note 1)	Yes	No, unless: <b>Write owned objects</b> and the user owns the object Or <b>Write any unfrozen</b> and object / model is unfrozen Or <b>Full Control</b> is granted.	No, unless: <b>Write owned objects</b> and the user owns the object Or <b>Write any unfrozen</b> and object / model is unfrozen Or <b>Full Control</b> is granted.
Delete objects (see note 1)	Yes	No, unless: <b>Delete owned objects</b> and the user owns the object Or <b>Delete any unfrozen</b> and object / model is unfrozen Or <b>Full Control</b> is granted.	No, unless: <b>Delete owned objects</b> and the user owns the object Or <b>Delete any unfrozen</b> and object / model is unfrozen Or <b>Full Control</b> is granted.
Freeze / unfreeze objects	Yes	No, unless: Appropriate <b>Freeze / Unfreeze right</b> is granted (see note 2) And <b>Write owned objects</b> and the user owns the object Or <b>Write any unfrozen</b> and object / model is unfrozen Or <b>Full Control</b> is granted.	No, unless: Appropriate <b>Freeze / Unfreeze right</b> is granted (see note 2) And <b>Write owned objects</b> and the user owns the object Or <b>Write any unfrozen</b> and object / model is unfrozen Or <b>Full Control</b> is granted.
Change ownership of objects	Yes	No, unless: <b>Write owned objects</b> and the user owns the object Or <b>Write any unfrozen</b> and object /	No, unless: <b>Write owned objects</b> and the user owns the object Or <b>Write any unfrozen</b> and object /



		model is unfrozen Or <b>Full Control</b> is granted.	model is unfrozen Or <b>Full Control</b> is granted.
Set an object as a template or Create a new template (see note 1)	Yes	No, unless: <b>Write owned objects</b> and the user owns the object Or <b>Write any unfrozen</b> and object / model is unfrozen	No, unless: <b>Write owned objects</b> and the user owns the object Or <b>Write any unfrozen</b> and object / model is unfrozen Or <b>Full Control</b> is granted.

## Notes

1. Regardless of other rights, you cannot edit or delete the object if the object is a template or the Model Design is frozen.
2. There are 2 freeze "Levels" (Level 1 and Level 2), see "What are freeze levels?" for more information about how these work.

## Diagram dependent objects

<b>Action</b>	<b>System Manager (SM)</b>	<b>Project Manager (PM)</b>	<b>Normal User (NU)</b>
Create objects	Yes, if the diagram is locked by the current user (see note 1)	Yes, if the diagram is locked by the current user (see note 1)	Yes, if the diagram is locked by the current user (see note 1)
Edit objects	Yes, if the diagram is locked by the current user (see note 1)	Yes, if the diagram is locked by the current user (see note 1)	Yes, if the diagram is locked by the current user (see note 1)
Delete objects	Yes, if the diagram is locked by the current user (see note 1)	Yes, if the diagram is locked by the current user (see note 1)	Yes, if the diagram is locked by the current user (see note 1)

## Notes

1. There is no process by which you can explicitly lock a diagram; it locks because someone else is using it, or because it is frozen.

## Work with design objects

### Introduction

A design object is an abstract category of "thing" that is used - like a template - as the basis of the 'things' that you want to represent in your Corporate Modeler diagram or as objects in the repository.

A design object is something upon which ACTUAL INSTANCES (or modeling objects) are based.

For example: The Object Type 'shape' is a design object. It has the attributes: name, surface area, and number of corners but these attributes have no values, they are simply things which any shape needs to have to be definable as a 'shape'.

### Ownership

A user who owns a model has full Access Rights to that model and so can always create, edit, or delete design objects. The access right "Full Control" confers the equivalent rights as though the user owned the model.

Otherwise, how Users can work with design objects is determined primarily by what access rights have been assigned to them.

### Access Rights

For users who do not own a model, what they can do depends on the specific access rights that are assigned on the Access Rights dialog. For example, "Write owned only" allows users to create design objects and update those design objects but not to edit any other design object in the model.

For a complete description of each option, see Appendix A "The Access Rights dialog".

### General conditions

There are also some general conditions that prevent the creating, editing, and deleting of design objects. See chapter 3.

## Quick Reference

Note that users cannot create, edit, delete, or otherwise alter design objects that exist in a frozen model design.

<b>Action</b>	<b>System Manager (SM)</b>	<b>Project Manager (PM)</b>	<b>Normal User (NU)</b>
Create design objects	Yes	No, unless: <b>Write owned objects</b> and the user owns the object Or <b>Write any unfrozen</b> and object / model is unfrozen Or <b>Full Control</b> is granted Or User owns <b>model</b> .	No, unless: User owns <b>model</b> . Or <b>Full Control</b> is granted
Edit design objects	Yes	No, unless: <b>Write owned objects</b> and the user owns the object Or <b>Write any unfrozen</b> and object / model is unfrozen	No, unless: User owns <b>model</b> . Or <b>Full Control</b> is granted Or <b>Write owned objects</b> and the user owns the object Or <b>Write any unfrozen</b> and object / model is unfrozen
Delete design objects	Yes	No, unless: <b>Delete owned objects</b> and the user owns the object Or <b>Delete any unfrozen</b> and object / model is unfrozen	No, unless: User owns <b>model</b> . Or <b>Full Control</b> is granted Or <b>Delete owned objects</b> and the user owns the object Or <b>Delete any unfrozen</b> and object / model is unfrozen
Freeze / unfreeze design objects	Yes	No, unless: Appropriate <b>Freeze / Unfreeze right</b> is granted (see note 1) And <b>Write owned objects</b> and the user owns the object Or <b>Write any unfrozen</b> and object / model is unfrozen	No, unless: Appropriate <b>Freeze / Unfreeze right</b> is granted (see note 1) And User owns <b>model</b> . Or <b>Write owned objects</b> and the user owns the object Or <b>Write any unfrozen</b> and object / model is unfrozen

Change ownership of design objects	Yes	No, unless: <b>Change owner</b> granted And <b>Write owned objects</b> and the user owns the object Or <b>Write any unfrozen</b> and object / model is unfrozen	No, unless: <b>Change owner</b> granted And <b>Full Control</b> granted Or <b>Write owned objects</b> and the user owns the object Or <b>Write any unfrozen</b> and object / model is unfrozen
------------------------------------	-----	--	---

## Notes

1. There are 2 freeze "Levels" (Level 1 and Level 2), see "What are freeze levels?" for more information about how these work.

## Work with template objects and template diagrams

### Introduction

Template objects and diagrams are created in the Object View and are, in many respects, just like any other object or diagram.

However, because templates form the basis for the creation of all other diagrams and objects in your model, they act more as a "design object". Indeed, if the model design as a whole is frozen, then templates are also frozen.

### General conditions

There are also some general conditions that prevent the creating, editing, and deleting of templates. See the next chapter.

## Work with Corporate Modeler Preferences

### Introduction

"Preferences" is a term used to describe the different ways users can configure the behavior and appearance of Corporate Modeler. Preferences are not objects that are created but a series of options that are set in various parts of the product.

How a user can work with Preferences is determined primarily by the user's **Power Level**.

### How to

For a detailed description of the different Preferences and how to configure them, find this topic in the online Help:

- Configure Corporate Modeler preferences

You can find this by typing "preferences" into the index.

## Quick Reference

<b>Action</b>	<b>System Manager (SM)</b>	<b>Project Manager (PM)</b>	<b>Normal User (NU)</b>
Set System Options	Yes	No	No
Add, edit, or remove Information Pages	Yes	No	No
Set Model Preferences	Yes	Only for those <i>models</i> they own	Only for those <i>models</i> they own
Set Diagram Preferences	Yes	Yes	Yes
Set User Preferences	Yes	Yes	Yes

## Work with Export and Import

### Import into an existing model

Any user can import objects into an existing model so long as they have Write Any Unfrozen access rights. However, users cannot import if:

- They do not have Write Access rights.
- The target model is frozen.
- Objects that were originally exported are frozen in the original model; they are then updated and imported back into the original model.

See appendix D for an illustrations.

### Import into a new model

When you perform an import into a new model, you actually create a model. Therefore, to do this, you must have the right to create models. Otherwise, you are only given the option to import into an existing model.

### Import into models on a standalone workstation

Most users log onto to a standalone PC as ADMIN, which provides the same rights as a System Manager. However, if you have logged onto a standalone workstation using your normal logon details, then the same restrictions apply as though you were importing into a model on the server.

### Export and import with Auto Modeler

Auto Modeler is an add-on component that allows users to download and upload information from or to your model using Microsoft Word, Excel, Project or CSV files as your target or source. See Appendix E for examples.



## Quick Reference

<b>Action</b>	<b>System Manager (SM)</b>	<b>Project Manager (PM)</b>	<b>Normal User (NU)</b>
Export a model or selection from a model	Yes	Yes	Yes
Export Administration objects (see note 1)	Yes	Yes	Yes
Import new modeling objects into an existing model on the server	Yes	No, unless: <b>Write any unfrozen</b> and model is unfrozen Or <b>Write owned objects</b> and the user owns the model Or <b>Full Control</b> is granted.	No, unless: <b>Write any unfrozen</b> and model is unfrozen Or <b>Write owned objects</b> and the user owns the model Or <b>Full Control</b> is granted.
Import updated modeling objects into an existing model on the server	Yes	No, unless: <b>Write any unfrozen</b> and object / model is unfrozen Or <b>Write owned objects</b> and the user owns the existing object Or <b>Full Control</b> is granted.	No, unless: <b>Write any unfrozen</b> and object / model is unfrozen Or <b>Write owned objects</b> and the user owns the existing object Or <b>Full Control</b> is granted.
Import new design objects into an existing model on the server	Yes	No, unless: <b>Write any unfrozen</b> and model is unfrozen Or <b>Write owned objects</b> and the user owns the model Or <b>Full Control</b> is granted.	No, unless: <b>Write any unfrozen</b> and model is unfrozen Or <b>Write owned objects</b> and the user owns the model Or <b>Full Control</b> is granted.
Import updated modeling objects into an existing model on the server	Yes	No, unless: <b>Write any unfrozen</b> and object / model is unfrozen Or <b>Write owned objects</b> and the user owns the existing object Or <b>Full Control</b> is granted.	No, unless: <b>Write any unfrozen</b> and object / model is unfrozen Or <b>Write owned objects</b> and the user owns the existing object Or <b>Full Control</b> is granted.
Import into a new model on a standalone PC	Yes	Yes if logged on as ADMIN, otherwise same as for server models	Yes if logged on as ADMIN, otherwise same as for server models
Import into an existing model on a standalone PC	Yes	Yes if logged on as ADMIN, otherwise same as for server models	Yes if logged on as ADMIN, otherwise same as for server models

**Notes**

1. Administration objects are modeling objects that are not specific to any particular model. These comprise:

- Users
- User Groups
- Subject Areas

## Work with sub-models

### Introduction

As you can see from the table opposite, for an NU to be able to do complete round-trip sub-modeling requires that they can:

- Create Subject Areas
- Create Models
- Have the Access Right "Full Control" assigned to both the master and sub-model

### Sub-models on a stand-alone workstation

Special considerations apply here. For a complete description including the steps involved, please refer to the online help topic "Transfer sub-models to a standalone workstation".

## Quick Reference

<i>Action</i>	<i>System Manager (SM)</i>	<i>Project Manager (PM)</i>	<i>Normal User (NU)</i>
Create Subject Areas	Yes	Yes	No, unless all NUs have been explicitly granted this right via System Options.
Lock the master model	Yes	Owned models Or <b>Full Control</b> is granted	Owned models Or <b>Full Control</b> is granted
Create the sub-model	Yes	Yes	No, unless: <b>Full Control</b> is granted
Lock the sub-model	Yes	Owned models Or <b>Full Control</b> is granted	Owned models Or <b>Full Control</b> is granted
Merge back into the master model	Yes	No, unless: <b>Write any unfrozen</b> and model is unfrozen Or <b>Write owned objects</b> and the user owns the model Or <b>Full Control</b> is granted.	No, unless: <b>Write any unfrozen</b> and model is unfrozen Or <b>Write owned objects</b> and the user owns the model Or <b>Full Control</b> is granted.

## Chapter 3

# General conditions that prevent access to objects in a model

In this chapter, we look at what prevents users from creating, editing, or deleting objects (or design objects), even though they may have the appropriate access rights.

### Work with modeling objects

	<i>Create</i>	<i>Edit</i>	<i>Delete</i>
Model is frozen	No	No	No
Model is locked by another user	No	No	No
Object is frozen		No	No
Object is being edited by another user		No See note 1	No See note 1
Object appears on at least one diagram			Cannot delete that object in Model Explorer
Object appears on at least two diagrams			Cannot delete that object from either Corporate Modeler or Model Explorer. See note 2
Association between two objects is frozen			Cannot delete either object in the association unless user has rights to delete the intersection object (the association itself). See appendix B for an example

#### Notes

1. If a diagram is being edited by another user, you cannot edit or delete any diagram-dependent objects, i.e. Process Breaks, Iteration Groups, Connectors, Connector Sets, Data flows, and Free Text. This is because they do not exist independently of a diagram.
2. If you want to remove an object from a diagram without deleting it from the model (so that it can appear on other diagrams), you should **clear** it from the diagram.

## Work with design objects (including templates)

	<b>Create</b>	<b>Edit</b>	<b>Delete</b>
Model is frozen	No	No	No
Model is locked by another user	No	No	No
Model design is frozen	No See note 1	No See note 1	No See note 1
Individual design object is frozen		No	No
Design object is being edited by another user		No	No
There is at least one instance of a custom object type			No See note 2

### Notes

1. Freezing the model design also includes template objects and template diagrams – i.e. you cannot create, edit, or delete these when the whole design is frozen. (Freezing the model design is done on the Status tab of the Model properties dialog.)

However, it does not include diagram or object Categories. You can still continue to create, edit, and delete categories until the category list is separately and explicitly locked, which is done by choosing to "Lock Pick List" in the Design view of Model Explorer.

The reason for this is explained more fully in Appendix C.

2. There are no such restrictions on Property Types. Suppose your model contains instances of predefined object types with user-defined property types (e.g. Process objects with additional panes and properties). You can still delete the user-defined property type although all data that might have entered into this property is permanently lost.

## Chapter 4

# Glossary of terms

Access Rights	<p>Access Rights are the differing privileges given to users, or to members of user groups to see and modify model data in the repository.</p> <p>For example: Members of the user group "IT Users" could be given full edit rights to the objects in the model "IT Structure", but only be given read-access to the objects in the model "Management Structure".</p> <p>A user's ability to see and change an object is determined by their access rights to the object and by the object's freeze level.</p>
Administration Objects	<p>Modeling objects that are not specific to any particular model. These comprise:</p> <ul style="list-style-type: none"><li>• Users</li><li>• User Groups</li><li>• Subject Areas</li></ul>
Categories	<p>A category is a property of all Predefined Object Types and is used to "categorize" that object. In some ways, think of it as a "grouping" for different types of object. For example, a Process has these default categories:</p> <ul style="list-style-type: none"><li>• Business Process</li><li>• Elementary Business Process</li><li>• Derived Logical Process</li><li>• Transaction Step</li><li>• User Request</li></ul> <p>I think I would also want to see which processes were performed by a machine, and which by a person (so I can do some analysis) to record this I could add the following two categories for a process:</p> <ul style="list-style-type: none"><li>• Manual - to "group" all processes that are performed by an actual person.</li><li>• Automatic - to "group" all process that occur automatically (prompted by a non-human system).</li></ul>
Design Objects	<p>A design object is an abstract category of "thing" that is used - like a template - as the basis of the 'things' that you want to represent in your Corporate Modeler diagram or as objects in the repository.</p> <p>A design object is something upon which ACTUAL INSTANCES (or modeling objects) are based.</p> <p>For example: The Object Type 'shape' is a design object. It has the attributes: name, surface area, and number of corners but these attributes have no values, they are simply things which any shape</p>

needs to have to be definable as a 'shape'.

#### Freeze Levels

Freezing objects in your model prevents users from being able to edit their properties (disables the fields in the properties dialog for any frozen object). Select either Freeze Level 1 or Freeze Level 2 to freeze the properties of objects.

The Freeze Level number does not set a different freeze level (i.e. it does not mean that different users see the objects as frozen depending on which freeze level is set). The freeze level number defines which users are able to UNFREEZE the objects once they have been frozen.

For example: The system contains two users, Admin and Manager. Admin has Freeze Level 1 and Manager, Freeze Level 2. If Admin sets an object to Freeze Level 1, both will see this object as frozen (they will not be able to edit its properties), but only Admin can unfreeze the object, Manager cannot (Manager can only unfreeze objects which have Freeze Level 2).

#### Group

See User Group.

#### Locking

Usually applies only to a model - by a locking a model, no-one in a project team can see the model, so it is a way of safeguarding model integrity if you are, say, doing an import or merge.

However, it also refers to diagrams or objects that are "open for editing". Although Corporate Modeler is a multi-user tool, this function means that users cannot work simultaneously on the same object. Therefore, if someone else has an object open, then it is effectively locked in that no-one else can edit it.

Finally, assuming you have the appropriate access rights, you can also "Lock Pick List" (in the Design View), which is a way of preventing other users from modifying a category list.

#### Master model

A model from which sub-models are created.

#### Merge

The means by which sub-models are reintegrated with a master model.

#### Model

A model is a self-contained collection of objects within the Corporate Modeler repository.

#### Model Design

The modeling objects – both predefined (e.g. Processes) and user-defined – that you use to develop your model. The term also includes categories and template objects.

#### Object

Everything stored in the repository is an object. So, for example, every Process that you create is an object.

Note there is a distinction to be drawn here between Object Types and Object Instances.

An Object Type (or Design object) refers to the range of the objects in the Repository. For example, you can work with Processes, Organizations, and all other predefined Object Types, as well as with any user-defined Object types that you create.

An Object Instance (or Modeling object) is when you create an actual object of that type. For example, say you create three processes called "Record Order", "Check Credit" and "Deliver Order", then each of those processes is an instance of the process Object Type.

#### Ownership

When a user creates a new object, diagram, or model, he or she automatically owns it. Ownership confers additional access permissions over that object, diagram, or model.

#### Power Levels

Classify the hierarchy of system privileges of users. Power levels are



allocated to users to give them rights to data in the Casewise tools, including the rights to allocate power levels to other users.

Preferences	<p>Configuration settings that determine look and feel in Corporate Modeler. There are various preferences:</p> <ul style="list-style-type: none"><li>• System – these affect the whole system (e.g. System Options)</li><li>• Model – these affect the model</li><li>• Diagram – these affect how the diagram looks</li><li>• User – these are specific to the individual user.</li></ul>
Subject Area	<p>Groups objects into areas of interest and is used to create a sub-model.</p>
Sub-model	<p>A model that is created from a subject area in a master model.</p>
System Options	<p>A set of options accessed from the Tools menu   the Administration view. System Managers can use these to determine whether Normal users can create models and subject areas.</p>
Templates	<p>A model, diagram, or object can be specified as a template. You can then create new models, diagrams, or objects from this template and so inherit all the properties saved in the template.</p> <p>However, the new object is not linked to the template, so if you change the properties of the template object, these changes do not flow through to the existing objects based on that template.</p>
User	<p>Each user of Corporate Modeler is identified by their user record, which defines their user name, log on name and their access rights to models and objects.</p> <p>A person can have more than one user record. Any person who does have more than one user record is identified as more than one user by Corporate Modeler.</p>
User Group	<p>User groups comprise a number of users. A user can be a member of more than one user group. All users who are members of a user group inherit the access rights granted to the user group. Therefore user groups provide a quick way to grant access rights to a large number of users.</p>
UUID	<p>Unique Universal Identifier, this is a 32 digit Id that uniquely identifies every object created in the Corporate Modeler repository.</p>

# Appendix

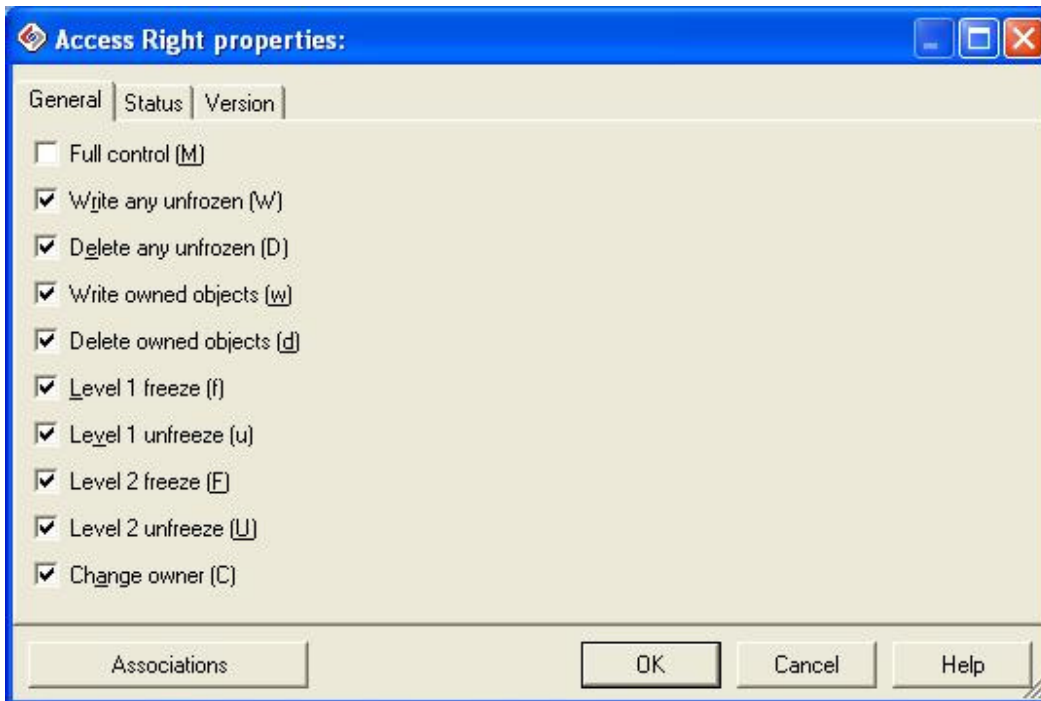
## Appendix A: Access Rights dialog

For instructions on how to set up access rights, refer to the online Help topic "Set up users, groups, and access rights".

When you assign users or groups to a model (or vice versa), this dialog opens. It is here that you specify what access rights that user has for the specified model.

Any user can view what access rights they have in the Model Explorer List pane (Detail option switched on).

The options on this dialog do not affect Administration objects (i.e. Users, Groups, and Subject Areas). For models (i.e. creating or editing models themselves rather than the objects within them), only the Full Control option applies.



(Note that items will disable, if other rights they are dependent upon are not selected.)

### What each option allows:

Name	Description
Full Control (M)	Confers the same rights to a model as if the user had created that model, i.e. the same as owning a model, which means full access rights to that model and all the objects and design objects within it. <i>Assigning a user the "Full Control" right, has the same effect as selecting all of the following rights.</i>
Write any Unfrozen (W)	Can update all unfrozen objects and design objects in the model.
Delete any unfrozen (D)	Can delete all unfrozen objects and design objects in the model.
Write owned objects (w)	Can create modeling and design objects if the user is the owner of those objects and the objects are not frozen.

Delete owned objects (d)	Can delete modeling and design objects if the user is the owner of those objects and the objects are not frozen.
Level 1 freeze (f)	Can freeze objects or individual design objects at level 1.
Level 1 unfreeze (u)	Can unfreeze objects or individual design objects frozen at level 1.
Level 2 freeze (F)	Can freeze objects or individual design objects at level 2.
Level 2 unfreeze (U)	Can unfreeze objects or individual design objects frozen at level 2. This right also automatically allows the user to refreeze at level 1.
Change owner (C)	Can change the owner of an object or design object.

## Appendix B: Associations and access rights

### General conditions

If an object is frozen, any user can still make and remove associations to that object.

If, however, the intersection object (the object that stores information about the association itself) between two objects is frozen, then you may no longer be able to delete the objects in the association. The example below illustrates this point.

### Deleting objects associated to other objects: an example

An NU (let's call her Jane) creates a process instance called "Record Order". As such, Jane owns that object.

Jane has the access permissions "Write any", "Delete owned objects", "Update owned objects".

A PM then associates Record Order to an organization called "Sales" and creates a Reason for Involvement between the two objects. As such, the PM owns the Reason for Involvement.

Jane then wants to delete "Record Order". With the permission "Delete owned objects", Jane would normally be able to do this. However, because she cannot "delete any unfrozen" objects, i.e. objects she does not own, then she cannot delete the association between the two objects, which deleting Record Order would do. The result is she cannot delete Record Order.

A variation on this is that Jane does have the access right "Delete any unfrozen". In the above scenario, she would be able to delete Record Order (and the Reason for Involvement with Sales). However, suppose that the Reason for Involvement has also been frozen. This again prevents Jane from deleting the Reason for Involvement and as such, she is again prevented from deleting Record Order.

In summary, therefore, a user can only delete an object that is associated to other objects if that association (or "link object") is itself "deletable" by the user doing the deleting.

## Appendix C: Why Categories are excluded when the model design is frozen

All object types (except Events and Results), whether predefined or user-defined, have a property type called "Category".

A Category is a list of items that describe different flavors of the parent object. For example, Processes are sub-divided into standard categories like Business Process, Elementary Business Process, Derived Logical Process, and so on.

You can also create a new category called, say, "Automatic" (so that you can categorize processes as being: performed by a computer).

When you freeze the model design, users are still free to add, edit, and delete items from this category List (so they could still add the opposite category: "manual").

The main reason for this is because category lists might be inherently fluid - a constantly changing list of suppliers, for example, which demands flexibility in maintaining the category lists.

However, the downside is that a system manager probably does not want users adding new Process categories on the fly.

To get round this, the category List for each Object Type must be individually locked. Only the following can do this:

<b>Action</b>	<b>System Manager (SM)</b>	<b>Project Manager (PM)</b>	<b>Normal User (NU)</b>
Lock all "Drop-down lists"	Yes	Only for those <i>models</i> they own Or <b>Full Control</b> is granted.	Only for those <i>models</i> they own Or <b>Full Control</b> is granted.

This is done in the Design View: open the Properties dialog for the Property Type called "Category" (each Object Type has this Property Type); on this dialog, select the Lock Drop-down list box.

Now, no other users can add extra categories, delete categories, or change the name of the existing categories for that object type.

## Appendix D: Examples of when you cannot import into an existing model

### Model is frozen

You cannot import into an existing model if the target model itself is frozen.

### Identical object is frozen

Consider this scenario:

1. You export a model, or selected objects in a model, and import them into another or new model. Let us call these models Original and New.
2. In the Original Model, you freeze Application 1.
3. In the New Model, you update Application 1.
4. You then export the New Model and import the XML file into the existing Original Model.

The updated Application 1 is rejected because it is now frozen in the original Model. You see this in the Import Review Screen:

## Appendix E: Automodeler and Access Rights

Automodeler is an add-on component that allows users to download and upload information from or to your model using Microsoft Word, Excel, Project or CSV files as your target or source.

Any user can download information regardless of what access rights they have.

However, to upload depends on a variety of factors:

- If you are uploading to a new model, you must have the rights to create new models.
- If you downloaded data from objects that you own and made changes in Microsoft Word, then you can only upload those changes if you have the access right "Write owned objects".
- If you downloaded data from objects that you do not own and made changes in Microsoft Word, then you can only upload those changes if you have the access right "Write any unfrozen".
- You cannot upload changes if the model is frozen or if the individual objects that you have changed are frozen.

Automodeler also allows you to create new objects from Microsoft Word, Excel, or Project. To do this, you must be able to create new objects, i.e. have Write or Full Control access rights (or own the model).