Degree Works

Shepentry
User Guide

Release 5.0.1
March 2018

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Contents

Introduction

In Degree Works applications, all components of business functionality are in the form of services. A service can be an entire Web page, or could have a narrower scope, for example, a single button. Services are defined in a database known as the Shepherd (SHP) Database and each service has a key-pattern associated with it. Services are locked and Degree Works users need keys that satisfy the key-pattern for a service to use that service. For a list of services and their associated keys, see the *Services* section in the *Degree Works Technical Guide*.

Assigning or removing keys from a user profile is one way to control access to Degree Works applications and functionality. Shepentry is a data entry program that allows a system administrator to assign keys to a user.

Users

Authenticated users are given access to Degree Works services based on their userclass assignment. User-class assignment associates the user with similar users for the purpose of controlling read-write access to notes and access to menu options in Degree Works.
The following user-classes are defined:

User Class	Description	Group
ADV	Advisor	SRNADV
ADVX	Advisor without exceptions	SRNADVX
APP	Applicant	SRNAPP
ASST	Assistant	SRNASST
CLRK	Clerk	SRNCLRK
DEAN	Dean	SRNDEAN
DEPT	Department Head	SRNDEPT
REG	Registrar	SRNREG
STU	Student	SRNSTU

For more information about users, see the *Users* section of the *Degree Works Technical Guide*.

Keys

Each Degree Works service has a key-pattern associated with it. Services are locked and Degree Works users need keys that satisfy the key-pattern for a service to use that service. For a list of services and their associated keys, see the Services section in the Degree Works Technical Guide. Keys can be assigned individually to users or through groups. Keys can also have a date limit attached to them that affects their validity. A key can become invalid after a specified date, after which a user cannot use that key to access the associated service. Similarly, a group can have a date limit, a user may be assigned to a group only till a certain date, a key may be assigned to a group only till a certain date, and a key may be assigned to a user only till a certain date. In order to use an assigned a key, all possible date conflicts must be resolved favorably.

In addition to the date validity check, the status of a key may impact its use. A key may be used positively, meaning the key is added to the keyring for the user. Or, a key may be used negatively, meaning the user may not possess the key regardless of how many ways they might have inherited it or been granted it. This allows the administrator to control access to some service for a period of time.

A user's keyring contains all the keys assigned to the user. These keyrings are stored in the Shepherd Database (SHPDB)and give access to services.

Note: The following keys are used to grant access to Shepentry functions: SHPENTRY, SHPUSER, SHPGROUP, SHPLOGS, SHPPASS, and SHPSET.

Groups

A group is a set of keys. Keys can be assigned to users through groups. For example, if a group contains three keys, including the user in that group automatically assigns those three keys to the user. For a list of groups and associated keys, see the *Groups* section in the *Degree Works Technical Guide*.

Passports

When users are authenticated at login, they acquire keys that are assigned to them. Generating a keyring every time a user logs in to a Degree Works application uses time and system resources, especially if complex date and key status validation rules are in place. A passport is one way to simplify authentication through keys. Once a user has been authenticated, the user keyring is created and stored in the Shepherd Database. This creates a highly secure environment for later authentication of service requests. A service request is authenticated by comparing the user's keyring with the service's keyring, and resolving any rules associated with access to the service. A passport has an expiration date and time. When the passport expires, the user must re-authenticate and a new keyring is generated and stored with a new passport.

System Settings

Different customizable system settings are made available to users to customize Degree Works in the way that best suits their requirements. For example, a user can update a system setting to change the number of rows that are displayed on a page by default.

Sign in or out of Shepentry

Perform the following steps to sign in to Shepentry.

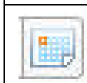
1. Access Shepentry using the URL.
2. Type your user name and password in the fields provided.
   If you want the application to store your username so that it is pre-filled the next time you access Shepentry, select the **Remember User Name?** check box.
3. Click **Sign In**.
   You are logged in to Shepentry.
4. Select the **Shepentry** tab.
   The *Shepentry Overview* page is displayed.

To sign out of Shepentry, click **Sign Out**, which is displayed at the top of each page.

Shepentry interface

The *Shepentry Overview* page has links to the main modules of Shepentry and to the *Shepentry Overview* page.

The following elements can be used when working on the Shepentry modules:

Shepentry Overview	Click to return to the *Shepentry Overview* page.
Shepentry	Click to return to the first page of the Shepentry module that you are currently working on.
Help	Click to display the Shepentry Help files.
Sign Out	Click to log out of Shepentry.
	Available on every page. Click to browse through recently accessed pages. The number of recently accessed pages is displayed on the folder icon.
	Click to create a new record. For example, click this button on the *Users* page to create a user.
	Click to open a record. For example, select a user in the search results list and click this button to display the user details.
	Click to edit a record. For example, select a user and click this icon to edit the user details.
 	Click to delete a record. For example, select a user and click this icon or button to delete that user record.
	Click to close the Shepentry page that you are currently viewing.
	Click to refresh and update the data on the page that you are currently viewing.
	Click to select a calendar day.

Advanced Search

Use Advanced Search to specify additional search criteria, known as attributes, and search for records that match those attributes. For example, when searching for a group, you can specify a group literal as an attribute and search for a group that uses that literal.

Perform the following steps to use Advanced Search.

1. Click **Advanced Search**.
   The *Advanced Search* box is displayed in the expanded view.
2. Select the required attribute from the **Select Attribute** drop-down list.
   The attribute is added to the search field.
3. Specify the attribute.
   For example, if the attribute is *Group Lit*, type the name of the literal in the field.
4. Select as many attributes as required.
   To remove an attribute, click the delete icon. To clear all the attributes, click **Clea**r.
5. Click **Go**.

The records that match the specified attributes are displayed.

You can use wildcards in searches. The *%* and * wildcards are supported.

Maintaining Users

The *Users* module allows you to add new users to the system. Using this module, you can assign keys to users and can add users to groups, giving them access to the Degree Works services available to that group.

Select a user

You can select a user from a list of users and add or maintain keys and groups for that user.

Perform the following steps to select a user.

1. Click **Users**.
   The *Users* page is displayed with the list of users in the database. To browse through the list of users, click **Previous** or **Next**.
2. To search for a user by name, type the full user name or a portion of it, in the **Search by Username** field and click the arrow.
   The users that match the user name are displayed.
3. Use the **Advanced Search** option to search for users using other search criteria.
4. To select a user from the list, either double-click the user, or select the user and then click **Open**.

User details, the list of keys, and the groups that have already been defined for that user are displayed.

Add a user

As an administrator, you can create a user by adding user details and adding keys to that user's profile. You can also include the user in specific groups.

Note: This process simply adds a security record for a person that has already been bridged to Degree Works. No user record can be created if a rad_primary_mst record does not already exist.

Add user details

Perform the following steps to add user details.

Note: The user record must already exist in the database before creating a user in the Shepentry application. Adding a user through the Shepentry application is required to give users access to Degree Works functionality.

1. Click **New** on the user search page.
   The *Add User* box is displayed.
2. Type a **Username** for the user in the box.
   This is the username that the user will use to log in to Degree Works.

3. Type in a **Degree Works ID**.
   You can also click the ellipsis (**...**) button to search for and select an ID from those that already exist in the database.
   The ID is a unique ID that is assigned to a user, for example, it could be a student ID or a campus ID.
4. Type in an **Alternate Username** that can be used for the user, if required.
   The alternate username can be used as a user's email address and their login ID. This gives an administrator the opportunity to perhaps correct or otherwise edit that address/ID.
   Either the Degree Works ID or the alternate username can be used to bring up the user record. The **Name** field will be filled in based on the user record.
5. Type in a **Password** for the user.
   This is the password that the user will use to log in to Degree Works. By default, the password display is encrypted, if you want the password to be visible while you type it in, click **Show Password**.
6. Specify the **User Class** to which the user belongs.
   The user will inherit access to the services allowed for the user class.
7. If you want to set a time limit for the user's access privileges, click the calendar icon for the **Access Expire** field and set a date when this user's access privileges are to lapse.
8. Use the **Timeout Increment** field to specify the time, in hours (H) and minutes (M), after which a user's session should automatically end, if the user is inactive.
   The timeout settings control when a user's session ends. When the user first gets authenticated, the timeout is set to the current time plus the timeout increment. This value is the time when the session will end if the user is inactive. Inactive is defined as not requesting a Degree Works service within a specific time frame. If the user stays active then the timeout value will be updated. The timeout value is updated by taking the current time and adding on the timeout increment.
9. If you want to keep the user logged in irrespective of the inactive time, select the **Never Timeout** check box.
10. Use the **Timeout Maximum** field to specify the maximum time for which a user session can be inactive before ending.
    The timeout value cannot exceed the initial authentication time plus the timeout maximum. As long as the user stays active, the session will not end within the maximum time allotted.
    If the timeout fields are not filled in, then the timeouts from the user's groups or from the UCX-CFG020 WEBPARAMS configuration record are used.
11. The **Fail Count** field displays the number of times the user has consecutively entered a username or password during logon. You can reset the count by clicking **Reset failed login count**.
    The **LogOn Date** and **LogOn Time** display the date and time of the previous successful login.
    The **Fail Date** displays the date of the previous unsuccessful login.
12. Specify the **User Status**.
13. If the user is a staff member, enter the staff code of the user in the **Staff Assign** field.
14. Specify the **Campus** and **Office** codes for the user.
15. If the user is a faculty advisor, select the **Advisor** check box.
16. If you want to allow more than one active concurrent session for this user, select the **Duplicity** check box.
    Allowing the user to have more than one active session at a time allows the user to log in to Degree Works applications from different systems at the same time.
17. If, at a later date, you want to deny access to Degree Works services for this particular user, select the **Deny Flag** check box.
18. If you want to set an expiration date for the account, you must specify it in the **Expire Date** field.
19. Click **Add**.

Note: Depending on how Shepentry is configured at your site, some the fields described may not be visible.

The user details are saved. A *Confirm Access ID* window is displayed if the Username you are trying to save already exists or if you changed the access ID.

Add a key for a user

Perform the following steps to add a key for a user. The user details must already exist for the user before you can add keys for that user.

1. Search for and select the user for whom you want to add keys.
2. On the user page, click the *New* icon in the **User Keys** section.
   The *Add Key* box is displayed.
3. From the **Key** drop-down list, select the key that you want to add to the user's keyring.
4. From the **Operator** drop-down list, choose whether you want to grant or deny access to this key for this user.
5. If you want to set a time limit for this key, click the calendar icon for the **Expire Date** field and set a date after which the key will be removed from the user's keyring.
6. Click **Add**.
7. Click **Save keys and groups**.

The key is added to the user's keyring and is displayed in the User Keys section for the user record. If you provide the Allow Permission for this key, the user can access the Degree Works service associated with that key.

Add a user to a group

Perform the following steps to add the user to a group. The user details must already exist for the user before you can add the user to a group.

1. Search for and select the user whom you want to add to a group.
2. On the user page, click the *New* icon in the **User Groups** section.
   The *Add Group* box is displayed.
3. From the **Group** drop-down list, select the group to which you want to add the user.
4. From the **Operator** drop-down list, select whether you want to grant or deny the user access to this group's security privileges.
5. If you want to set a time limit for the user's membership to the group, click the calendar icon for the **Expiry Date** field and set a date after which the user will be removed from the group.
6. Click **Add**.
7. Click **Save keys and groups**.

The user is added to the group and the group displayed in the **User Groups** section for the user record. If you provide the *Allow* Permission for this group, the user can access the Degree Works services that are available to that group.

Edit a user record

You can edit a user record to modify user details, to add or remove keys from the user's keyring, or to add or remove the user from specific groups.

Perform the following steps to edit a user record.

1. Search for and select the user record that you want to edit.
2. On the user page, click the *Edit* icon.
   The *Edit User* box is displayed.
3. Modify the user details as required.
   For more information about user details, see *Add user details*.
4. Click **Update**. A *Confirm Access ID* window is displayed if the Username you are trying to save already exists or if you changed the access ID.
5. To modify the list of keys assigned to a user, select the key that you want to edit and click the *Edit* icon in the *User Keys* section.
   For more information about keys, see *Add a key for a user*.
6. To remove a key from a user's keyring, select the key and click the *Delete* icon in the *User Keys* section.
   You can filter the list of keys that are displayed in the *User Keys* section by typing a part of the key name in the **Type to filter** box.
7. To modify the list of groups that a user belongs to, select the group that you want to edit and click the *Edit* icon in the *User Groups* section.
   For more information about groups, see *Add a user to a group*.
8. To remove the user from a group, select the group and click the *Delete* icon in the *User Groups* section.
   You can filter the list of groups that are displayed in the *User Groups* section by typing a part of the group name in the **Type to filter** box.
9. Click **Save keys and groups**.

The updates to the user record are saved.

Delete a user record

Perform the following steps to delete a user record.

1. Search for and select the user record that you want to delete.
2. Click the *Delete* icon.

The user record is removed from the system.

Maintaining Groups

Using the *Groups* module, you can assign keys to groups, giving members of that group access to the Degree Works services that match those keys.

Select a group

You can select a group from a list of groups, to add or maintain keys for that group.

Perform the following steps to select a group.

1. Click **Groups**.
   The groups page is displayed with the list of groups in the database. To browse through the list, click **Previous** or **Next**.
2. To search for a group by name, type the full group name or a portion of it, in the **Search by Group** field and click the arrow.
   The groups that match the name are displayed.
3. Use the **Advanced Search** option to search for groups using other search criteria.
4. To select a group from the list, either double-click the group name, or select the group name and then click **Open**.
   Group details and the list of keys that have already been defined for that group are displayed.

Add a group

As an administrator, you can create a group by adding group details and adding keys to that group.

Perform the following steps to create a group.

1. Click **New** on the group search page.
   The *Add Group* box is displayed.
2. Type a name for the group in the **Group** field.
3. Type a **Description** for the group.
4. Use the **Timeout Inc** field to specify the time, in hours (H) and minutes (M), after which a session for a user belonging to the group should automatically end, if the user is inactive.
   The timeout settings control when a user's session ends. When the user first gets authenticated, the timeout is set to the current time plus the timeout increment. This value is the time when the session will end if the user is inactive. Inactive is defined as not requesting a Degree Works service within a specific time frame. If the user stays active then the timeout value will be updated. The timeout value is updated by taking the current time and adding on the timeout increment.
5. If you want to keep the user of this group logged in irrespective of the inactive time, select the **Never Timeout** check box.
6. Use the **Timeout Max** field to specify the maximum time for which a user session can be inactive before ending.
   The timeout value cannot exceed the initial authentication time plus the timeout

maximum. As long as the user stays active, the session will not end within the maximum time allotted.
7. If you want to set a time limit for the group's access privileges, click the calendar icon for the **Expire Date** field and set a date when this group's access privileges are to lapse.
8. To add a key to the group, click the *New* icon in the *Group Keys* section.
   The *Add key* box is displayed.
9. From the **Key** drop-down list, select the key that you want to add to the group.
10. From the **Operator** drop-down list, choose whether you want to grant or deny access to this key for this group.
11. If you want to set a time limit for this key, click the calendar icon for the **Expiry Date** field and set a date after which the key will be removed from the group.
12. Click **Add**.
13. Click **Add** in the *Add Group* box.
    The group details and group keys are saved. When a user is added to the group, the user will inherit the group keys.

Edit a group

You can edit a group record to modify group details, or to add or remove keys from the group.

Perform the following steps to edit a group.

1. Search for and select the group record that you want to edit.
2. On the group page, click the *Edit* icon.
   The **Edit Group Details** box is displayed.
3. Modify the group details as required.
   For more information about group details, see *Add a group*.
4. Click **Update**.
5. To modify the list of keys assigned to a group, select the key that you want to edit and click the *Edit* icon in the *Group Keys* section.
   For more information about keys, see *Add a key for a user*.
6. To remove a key from a group, select the key and click the *Delete* icon in the *Group Keys* section.
   You can filter the list of keys that are displayed in the *Group Keys* section by typing a part of the key name in the **Type to filter** box.
7. Click **Save keys**.

The updates to the group record are saved.

Delete a group

Perform the following steps to delete a group.

1. Search for and select the group record that you want to delete.
2. Click the *Delete* icon.

The group is removed from the system.

Viewing Passports

Using the *Passports* module, you can view details for a particular passport. The keyrings and group keyrings that make up a passport are listed in the passport details. Note that only the passports created from logins into Transit and the Degree Works Management applications can be viewed here. Passports from other applications cannot be viewed here because they are stateless apps and as such are issued temporary passports as needed. That is, these applications create passports that exist only for a very short period of time.

View passport details

Perform the following steps to view the details for a particular passport.

1. Click **Passports**.
   The passports page is displayed with the list of passports in the database. You can browse through the list by clicking **Previous** and **Next**.
2. To search for a passport by name, type the full name or a portion of it, in the **Search by Passport** field and click the arrow.
   The passports that match the name are displayed.
3. Use the **Advanced Search** option to search for passports using other search criteria.
4. To select a passport from the list, either double-click the passport, or select the passport and then click **Open**.

The passport details, along with the keyring and group ring that make up this passport are displayed.

Delete a passport

Perform the following steps to delete a passport.

1. Search for and select the passport that you want to delete.
2. Click the *Delete* icon.

The passport is removed from the system.

Logs

The Shepentry application maintains log records that contain details of user activity on Shepentry. The logs record all requests to the server. This includes logons, logoffs, and each request for a page to be returned.

View a log record

Perform the following steps to access a log record.

1. Click **Logs**.
   The logs page is displayed with the list of log records. Browse through the list by clicking **Previous** and **Next**.
2. To search for a log record by user ID, type the full ID or a portion of it, in the **Search by User Id** field and click the arrow.
   The log records that match the name are displayed.
3. Use the **Advanced Search** option to search for log records using other search criteria.
4. To select a log record from the list, either double-click the log record, or select the log record and then click **Open**.

The log details are displayed.

Delete a log record

Perform the following steps to delete a log record.

1. Search for and select the log record that you want to delete.
2. Click the *Delete* icon.

The log record is removed from the system.

Customizing System Settings

Using the *System Settings* module, you can modify system settings to customize Degree Works. For example, you can update a system setting to change the number of rows that are displayed on a page by default.

View System Setting details

Perform the following steps to view the details associated with a particular system setting.

1. Click **System Settings**.
   The system settings page is displayed with the list of settings stored in the database. Browse through the list by clicking **Previous** and **Next**.
2. To search for a particular setting, type the full name of the setting key or a portion of it, in the **Search by Key** field and click the arrow.
   The settings that match the name are displayed. The *Key*, *Specification*, and *Value* of each setting are displayed.
3. Use the **Advanced Search** option to search for system settings using other search criteria.
4. Click a key name in the search results list.
   The description of the key is displayed in a box at the end of the list.
5. To select a setting from the list, double-click the setting that you want to display, or select the setting, and then click **Open**.

The selected system setting details are displayed.

Modify a System Setting

Perform the following steps to modify a setting. It is recommended that you update *only* the **Value** field of a system setting.

1. Search for and select the setting that you want to edit.
2. On the system settings page, click the *Edit* icon.
   The **Edit System Settings** box is displayed.
3. Modify the system setting details as required.
   For example, if you want to decrease the number of rows that are displayed in a data grid, enter the number of rows you want to display in the **Value** field of the associated system setting.
4. Click **Update**.

The updates to the setting are saved.

Important: Do not delete existing system settings.