Migrating to UX Security

2021 PSCC Conference

Key UX Security Considerations:

- Permissions
- Actions
- Security Roles
- Role Based Menus
- IP Access Controls
- Privilege Conflicts to Support Segregation of Duties

Permissions in UX

- Permissions can no longer be assigned directly to users in UX
- Many permissions have been retired in UX
- Permissions will continue to be phased out in UX
- Custom permissions can still be created in UX

Actions in UX

- Actions decide what access and privileges the user has (replacing permissions)
- Actions are not available to until they are activated and assigned to security roles
- There are more options to restrict user access and privileges are the ration of UX actions versus Classic permissions is over 6 to 1

Action Types

Add: Adds new records to the system.

Dashboard: Displays a screen that contains a collection of related information.

Delete: Deletes records from the system.

Dialog: Displays a box that displays information or asks for verification or other information.

Edit: Edits existing records in the system.

Export: Exports records from the system in the CSV or XML file formats.

Form: Displays UI elements that are used to view, add, edit, or delete records.

Grid: Displays a list of records.

Print: Document Displays UI elements that are used to print, email, or download copies of records.

Read: Searches the system for records.

Upload: Uploads records to the system in the CSV or XML formats.

Widget: Interacts with records.

Wizard: Displays a series of screens that lead you through a sequence of steps to complete a task.

Wizard Page Display: Displays a screen that is used to complete one or more steps of a task from a wizard.

Roles in UX

Roles in UX

- Actions & Non-Retired Permissions are assigned to Security Roles
- Users can be directly assigned to Security Roles(s)
- Security Role(s) can be assigned to User Positions and Users the assigned a Position
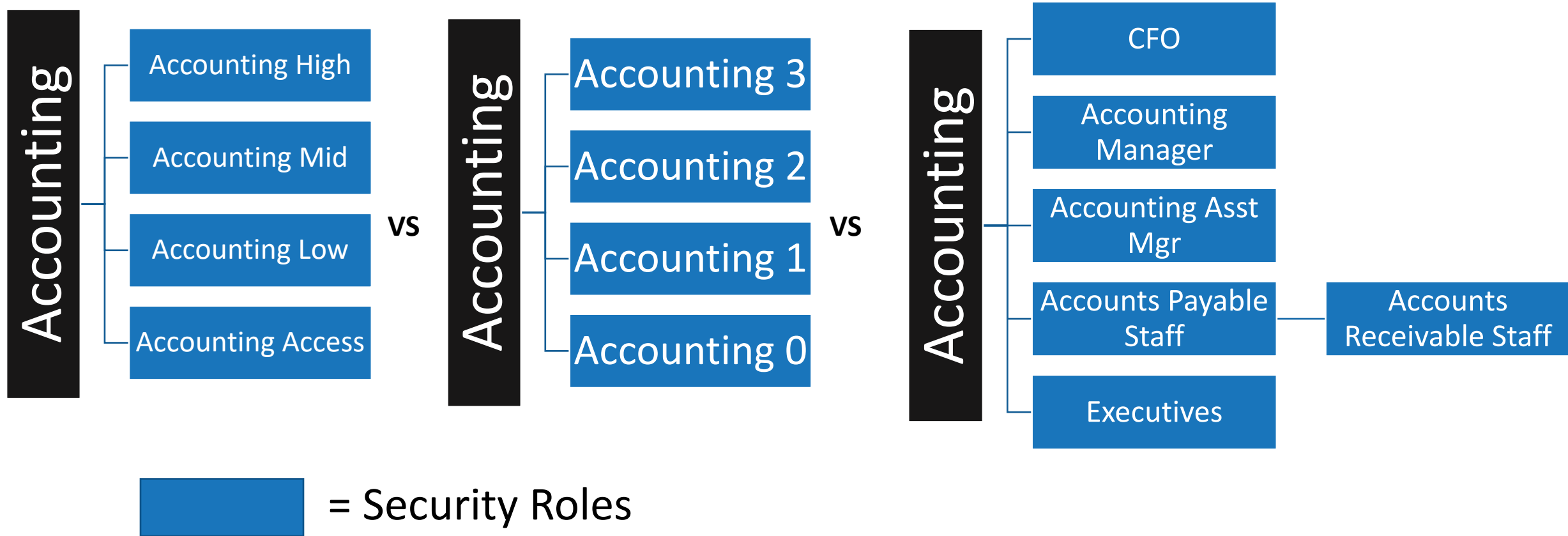
Security Role Challenges/Decisions

- Try to mimic Classic security roles or rethink role structures for UX
- Change/Standardize security role naming conventions
- Eliminate/Reduce permission-based security roles
- Define functional role hierarchies
- Define functional actions to roles mapping methodology
- Define common actions to roles mapping methodology
- Deciding whether role position linking will be used
- For enterprises, standardization and synchronization with group PCNs
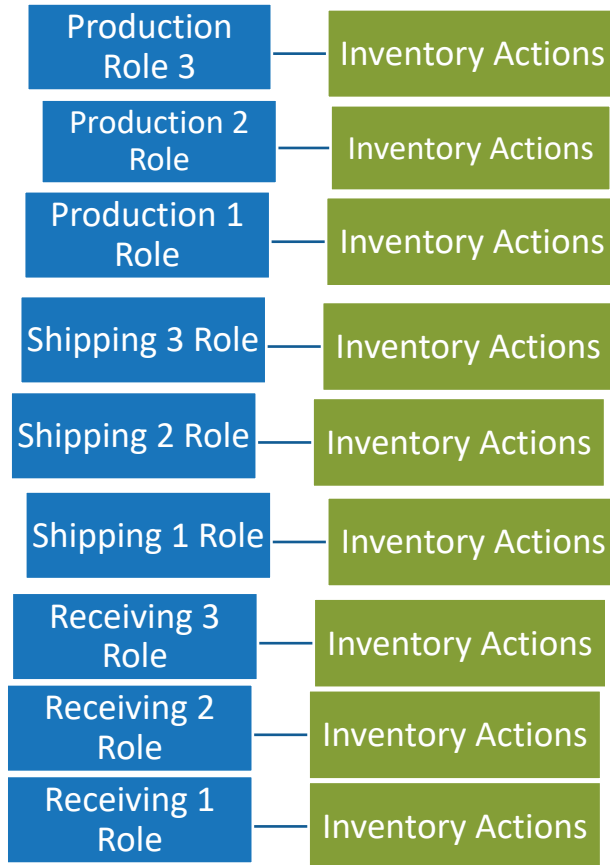
Functional Role Hierarchy Examples

Accounting
- Accounting High
- Accounting Mid
- Accounting Low
- Accounting Access

vs

Accounting
- Accounting 3
- Accounting 2
- Accounting 1
- Accounting 0

vs

Accounting
- CFO
- Accounting Manager
- Accounting Asst Mgr
- Accounts Payable Staff — Accounts Receivable Staff
- Executives

▮ = Security Roles

Functional Action to Role Mapping Examples

CFO — Accounting 3 Role — Accounting Level 3 Actions

CFO — Accounting 2 Role — Accounting Level 2 Actions

CFO — Accounting 1 Role — Accounting Level 1 Actions

vs

CFO — Accounting 3 Role — Accounting Level 3 Actions

CFO — Accounting 3 Role — Accounting Level 2 Actions

CFO — Accounting 3 Role — Accounting Level 1 Actions

= Security Roles   = Actions   = User

Common Action to Role Mapping Examples

Production Role 3	Inventory Actions
Production 2 Role	Inventory Actions
Production 1 Role	Inventory Actions
Shipping 3 Role	Inventory Actions
Shipping 2 Role	Inventory Actions
Shipping 1 Role	Inventory Actions
Receiving 3 Role	Inventory Actions
Receiving 2 Role	Inventory Actions
Receiving 1 Role	Inventory Actions

vs

Inventory Role — **Inventory Actions**

■ = Security Roles   ■ = Actions

User to Role Linking vs User to Position to Role Linking

Joe Tester
- Purchasing 3
- Receiving 3
- Inventory 1
- Accounting 0

vs

Joe Tester → Purchasing Manager
- Purchasing 3
- Receiving 3
- Inventory 1
- Accounting 0

= User   = Position   = Security Roles
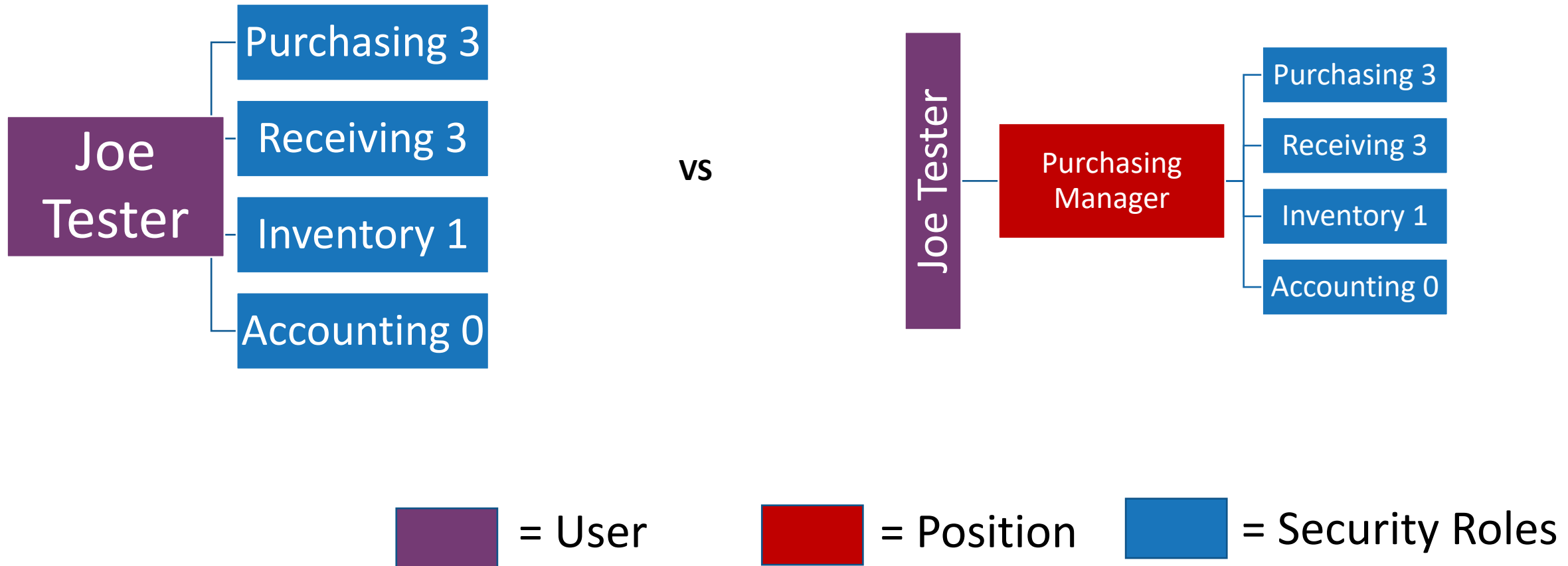
Role Based Menus
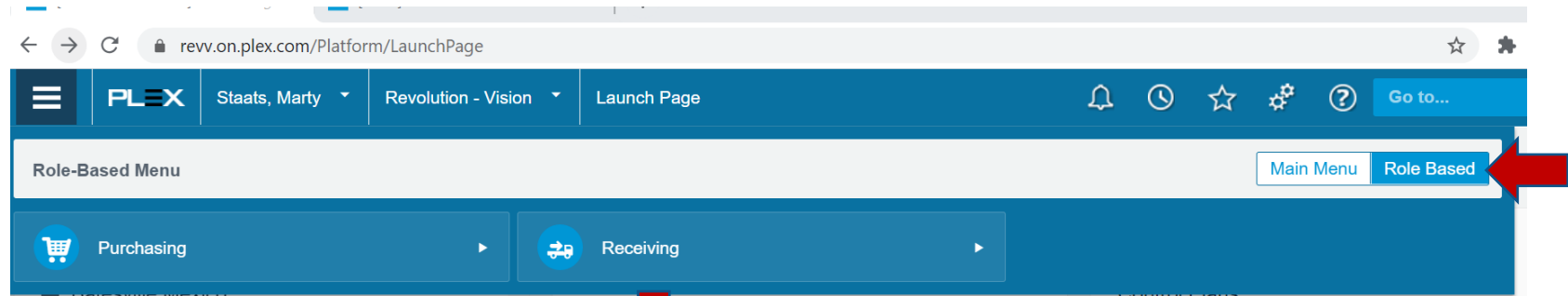
Will Role Based Security be Utilized?

If so, will it impact how you name/structure your security roles?
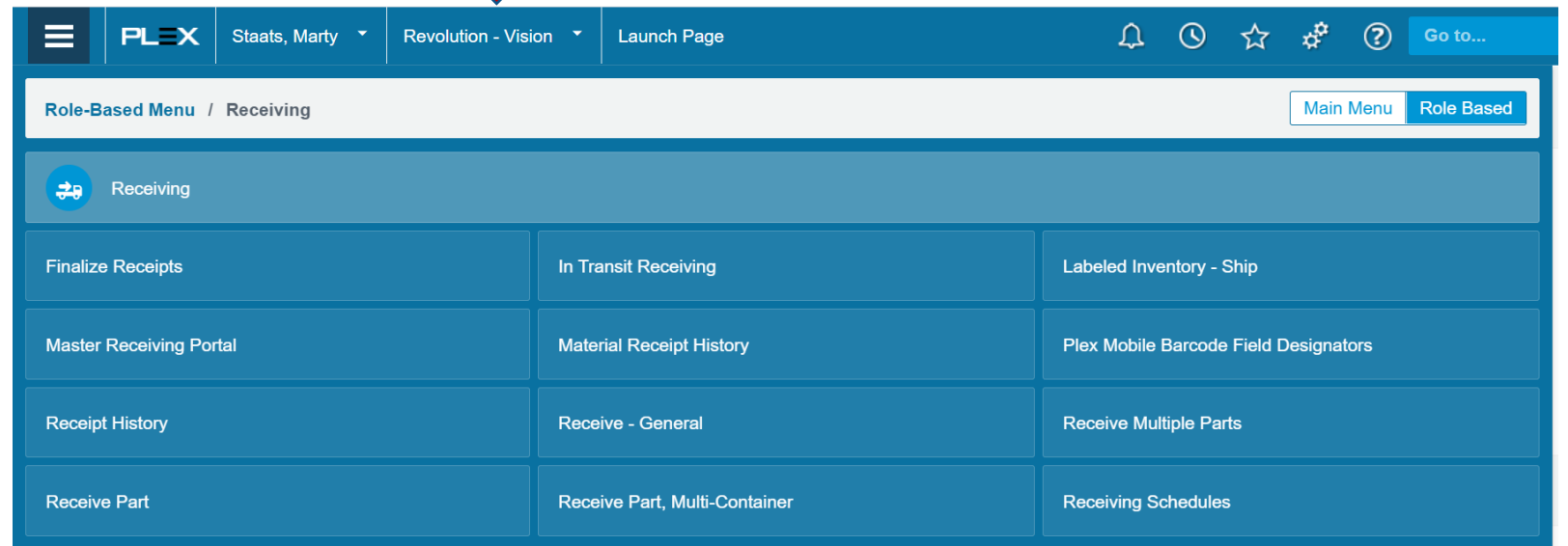
IP Access Controls in UX

At what level(s) will you enforce IP Access?

The Plex Manufacturing Cloud will be unavailable due to maintenance Sunday, February 14th for up to 4 hours from 7:30AM to 11:30AM E

| Platform | UX | | | Application | Receiving ✕ | 🔍 |

| Security Audit Complete | Both ✕ |

Show all filters   Sa

Module Group	Module	Application	Valid IP Address	Sec
Purchasing	Receiving	Receiving	65.29.75.131 ✕ 🔍	

Actions
Applications Valid IP

Users
User Setting

PCN
Valid IP Addresses

Plex Setting

Privilege Conflicts

Will Privilege Conflicts be needed to enforce Segregation of Duties (SOD)?

If so, have you determined those conflicts?