Roles Integration

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| Script | Direction |
| The Roles product integration makes sure the end-users’ app roles are synchronized with their roles in your enterprise system. This allows users to access the features and services available to their app roles. | General screenshots of the Roles PI homepage |
| Here’s how the role synchronization works:  To begin with, your user’s roles are managed in your enterprise system; we’ll refer to these as enterprise roles.  When the user logs into campusM, the RoleSync web service retrieves the user’s roles from the enterprise system and assigns them to the user as campusM customer roles.  Having retrieved the customer roles, campusM then assigns to the user the corresponding app roles, which are linked to those customer roles.  The communication between campusM and the enterprise system is configured in the Roles product integration. |  |
| In this session, we’ll demonstrate the various configurations required for RoleSync:  Adding the Roles product integration, the customer roles, and the app roles, scheduling the Refresh Role Sync, and configuring the authentication needed for RoleSync. |  |
| Let’s start by creating the Roles product integration.  In App Manager, go to Product Integrations, and click Add Product Integration Instance. For the Product Integration type, select Roles. |  |
| In this page, you can configure the Roles integration with your enterprise system.  Select Enable Product Integration; and provide a Description, which is the name of this Integration.  In the Roles Vendor section, select the format used to connect with your enterprise system, from: RESTful API, Microsoft Graph API, adAS SSO, and Okta. In our demonstration, we’ll use generic RESTful API. You can learn more about this format and the others in our Knowledge Center. | Description: Student Roles  Text box for document; [Managing Product Integrations > Roles](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/Managing_Product_Integrations/Roles) |
| Next, fill in the RESTful API Configuration details.  In the URL to retrieve the information field, enter URL of your enterprise server from which to retrieve the roles list. The URL should include any path parameters used in the API, for example, the username, which we will configure below.  Basically, this URL is a request to the server to provide all the roles for the specified user.  If there are any URL Query Parameters, for example, the username is passed on as a URL parameter, they are configured in this section.  In our example, the username is part of the path, and therefore is configured in the URL Path Parameters section.  Let’s add a path parameter for the username. The parameter name we enter here is the same one that appears in the URL. For Parameter Type, we’ll select Token Property; and enter the Token Property Name to be retrieved from the token, to be used as the user identifier.  So much for configuring the URL and its parameters. | URL: <https://mydomain.com/Roles/username>  Under URL Path parameters:  Parameter Name: username  Parameter type: Token Property  Token Property Name: USERNAME |
| Next, let’s set up the API Authentication.  For the Authentication Type, among other options, you can select Basic authentication, API Key, or OAuth Using Client Credentials authentication. Let’s select the Basic authentication type and enter the corresponding credentials.    Having filled in the connection informationOnce you completed configuring this Roles integration, you can test the API connection.  When you're done, save this Roles integration instance.  The new Roles integration has been created, and it will run upon user login. | Auth Type: Basic  Username: user  Password: 123456 |
| Next, let’s add the customer roles. These are the campusM equivalents to your enterprise roles.  In App Manager, go to App Settings > Enterprise Roles: Customer Roles.  In our demonstration, let’s suppose your enterprise system has three possible roles: student, lecturer, and other.  In addition to the above roles, we must add another role called SYNC=ON, which enables RoleSync.  Click Add customer role.  For its Name and Description, we must enter ‘SYNC=ON’.  Click Save and add another.  Now let’s add the three enterprise roles.  For the Name, make sure it matches the name as returned from the API, for example: student.  For the Description, enter the display name for the customer role in campusM, for example: ‘Student’ with a capital S.  Add the rest of the roles and click Save.  We have created four new customer roles: Our sync role, and three enterprise roles. | App Manager > App Settings > Enterprise Roles: Customer Roles.  Create roles for SYNC=ON, student, lecturer, other.  Student, Lecturer, Other. |
| Next, let’s configure the app roles, and make sure they are linked to these customer roles.  Go to App Settings > Enterprise Roles: App Roles.  First, we’ll create a new app role for the sync role. Click Add app role.  Select a Profile.  For Description, we’ll enter ‘SYNC=ON’.  To link this role to the corresponding customer role, make sure to select SYNC=ON from the Customer role drop-down list.  Click Save and add another.  We’ll add the other roles, making sure to link each role to its customer role.  Our app roles have been created! | App Manager > App Settings > Enterprise Roles: App Roles.  Create roles for SYNCH=ON, Student, Lecturer, Other. |
| By the way, we’ve just added these roles manually, but if you have many enterprise roles, you can import them in a single spreadsheet, under App Settings > Enterprise Roles: Import / Export Roles.  Here you can export a file with the current roles, add your own roles to the spreadsheet, and reimport.  We won’t do this now. | App Manager > App Settings > Import / Export Roles |
| Our next step is to schedule the Refresh Role Sync.  As we mentioned, RoleSync runs upon user login to the app. Since the time between required logins can take 30 days, you may want to refresh the roles on a shorter basis, especially if roles in your institution change often.  To schedule the Role Refresh, go to App Settings > Enterprise Roles: Refresh Roles.  The Refresh Role Sync process checks which users had a role change and flags them for RoleSync the next time they open the app, even if they were already logged in.  Make sure Refresh Role Sync is activated here.  Select on which days of the week to run the refresh. We recommend running it only once a week, since it refreshes all users.  Select the Refresh Hour and Save. | App Manager > App Settings > Refresh Roles |
| The last step of the configuration is enabling the Roles product integration in the profile authentication.  In App Settings, go to Profile Registration Authentication.  Edit the relevant profile.  For the auth endpoint, enter the following path: /addons/services/CampusMService/login.  Save your edits. |  |
| Finally, let’s publish our configurations.  Back in App Settings, go to Publishing: Publish Content. Select Services and App Profiles, and click Publish. |  |
| You should now have a good idea of how to configure RoleSync within your app. These roles can now be used to create a personalized experience for your app users.  Thanks for joining! |  |
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