



Petroleum Registry of Alberta

Registry Tip

Link your users to designate user roles

Release/Revision Date	Location of change in this document	Comment
November 7, 2002		Initial Release

- Audience:** For **Designate BA USAs** who have a Contracting or Subsidiary BA that has created a **Designate BA Relationship**.
- Purpose:** Link your users to User Roles owned by Contracting or Subsidiary BAs.
- Key Terms:**
- Contracting or Subsidiary BA** – A Contracting BA obtains work services from one or more Service Providers.
- Designate BA** - A Designate BA is a Business Associate (BA) that is appointed by a Contracting BA to act on the Contractor's behalf in the Registry.
- Prerequisite(s):** Before you begin performing work as a Designate BA USA, you must address all of the items in the checklist below. You must also have your BA USA User ID and password.



Designate BA USA Prerequisite Checklist	
1	<p>Ensure that the Contracting or Subsidiary BA USA has named your BA in the Manage Designate BA Relationship.</p> <p>How can you tell? There are two possible Designate Relationships. Which type do you have? Login with your BA USA User ID and password.</p> <p><u>With Manage All Roles capability...</u> If you see the Designate Business Associate Lookup that displays a list of at least two BAs (your BA and the Contracting or Subsidiary BA) then the relationship exists. (This relationship allows you to create, modify and delete User Roles on behalf of the Contracting or Subsidiary BA.)</p> <p><u>With Link to Role capability...</u> Go to the Admin Tasks -> Security -> Manage User ID and Access page. Select any existing user, scroll to the bottom and look at the Available Roles list. If you see a role that includes the name of the Designating BA, then the Designate BA Relationship exists. (This relationship allows you to link your users to an existing role that has been pre-defined by the Contracting or Subsidiary BA.)</p>
2	<p>Create a “Working User ID” for yourself... if you plan to perform work in the Registry on behalf of your Contracting or Subsidiary BA.</p> <p>Note: if you plan to only perform BA USA tasks, then you will not need a “Working User ID” to proceed.</p>
3	<p>Create User Accounts for your BA’s users. The steps in this explanation assume that you have created User Accounts for your BA and that you are now adding the capability for your users to work on behalf of your Contracting or Subsidiary BA.</p>



Procedures:

If you have **Manage All Roles** capability...

- 1) Login using your BA USA ID and password.
- 2) Select the Contracting or Subsidiary BA in the **Designate Business Associate Lookup**.
- 3) Use the Manage User Roles task to create a **Custom User Role** for your BA's users.
- 4) Select the **Designate Business Associate Lookup** (that appears on the Registry Utility bar beside the BA name.)
- 5) Select your BA in the **Designate Business Associate Lookup**.
- 6) Assign the new **Custom User Role** to your BA's users.
- 7) **Submit**. Your BA's users will now be able to perform work for your Contracting or Subsidiary BA.

If you have **Link to Role** capability...

- 1) Login using your BA USA ID and password.
- 2) Assign the User Role that has been pre-defined by your Contracting or Subsidiary BA to your BA's users.
- 3) **Submit**. Your BA's users will now be able to perform work for your Contracting or Subsidiary BA.

For more info:

Training module **2.3 Manage User Roles**
Training module **2.4 Manage User ID and Access**
Job Aids – **Set up User Accounts**