

Hierarchies and Impersonation

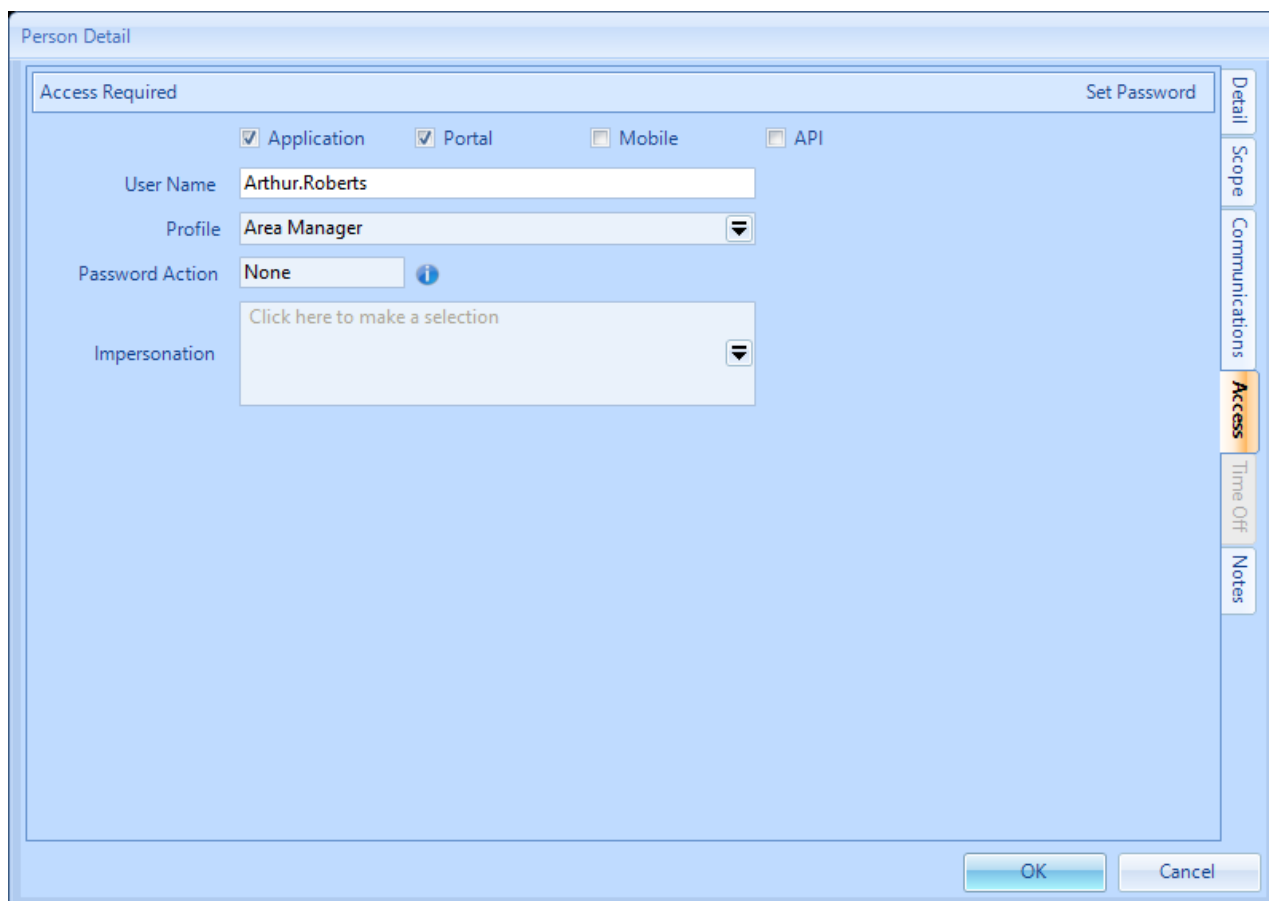
Wed, Jan 17, 2024 Viewing Authorisations

Two concepts available in the system are Hierarchies and Impersonation.

Hierarchies are the ability for Senior Managers to approve works at a lower level without being involved in the initial authorisation request. This means that a Senior Manager does not have to receive an email every time a lower level authorisation is required, but should a manager on a lower level of approval not be required, a Senior Manager with the permission of "Can Authorise Subordinate Work Orders" (and assuming the Authorisation Rules have been updated to include this function for the current instance) can view and authorise the Work Order in place of the other Manager.

This differs to the Impersonation functionality, which allows a user to be a 'buddy' of another user and therefore authorise Work Orders on behalf of the other user without having to have full access to the Buildings. A good use of this functionality is in the instance of Area Managers, where two Area Managers, managing separate areas are 'Holiday Cover' for their colleague. By setting them both up to be able to impersonate the other, should the covering Area Manager need to Authorise a Work Order on behalf of the other, this is now possible. Steps to achieve this are as follows:

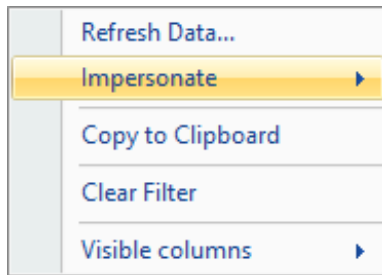
1. Against the relevant Person, on the Access Tab, click the Impersonation box:



The screenshot shows a 'Person Detail' window with the 'Access' tab selected. The 'Access Required' section has checkboxes for 'Application' (checked), 'Portal' (checked), 'Mobile' (unchecked), and 'API' (unchecked). The 'User Name' field is 'Arthur.Roberts' and the 'Profile' dropdown is 'Area Manager'. The 'Password Action' is 'None'. The 'Impersonation' dropdown is open, showing a list of users to select from. The 'Access' tab is highlighted in the right-hand navigation pane.

2. Choose the other authoriser that the current Person can 'Impersonate' and accept the changes. If this is to be reciprocal, makes sure the equivalent change is made against the other person too.

3. This will then give the right click option of "Impersonate" in the Authorisation List in the desktop application, and a link to "Impersonate" in the Portal:



4. By clicking this, the Manager will see a list of all Work Orders that their colleague is able to authorise, and these can be authorised on behalf of the other Manager. In doing so, the Authorisation Event added to the Work Order will show that it was approved by the covering Manager using the impersonation function - for full audit tracking.

Online URL: <https://ostarasystems.knowledgebase.co/article.php?id=349>