

FirstStep FAST Information Coordinators Training Manual

<http://its.syr.edu/training/pstrainingdocs>

Disclosure Form: <http://its.syr.edu/is/empack-form.cfm>

issecsd@syr.edu - Information Systems security team listserv

4/25/06

Overview

Information Coordinators provide a vital role in our computer-oriented working environment at Syracuse University. They are not only responsible for requesting applications and data access for users in their department(s) but are additionally responsible for providing security measures to protect that access. In this training manual we will review the procedures for requesting and controlling access to enterprise-wide applications through the use of FirstStep Single Sign-on FAST.

For more information, a list of Frequently Asked Questions is available on the Web at <http://its.syr.edu/admin-sys/fast/>.

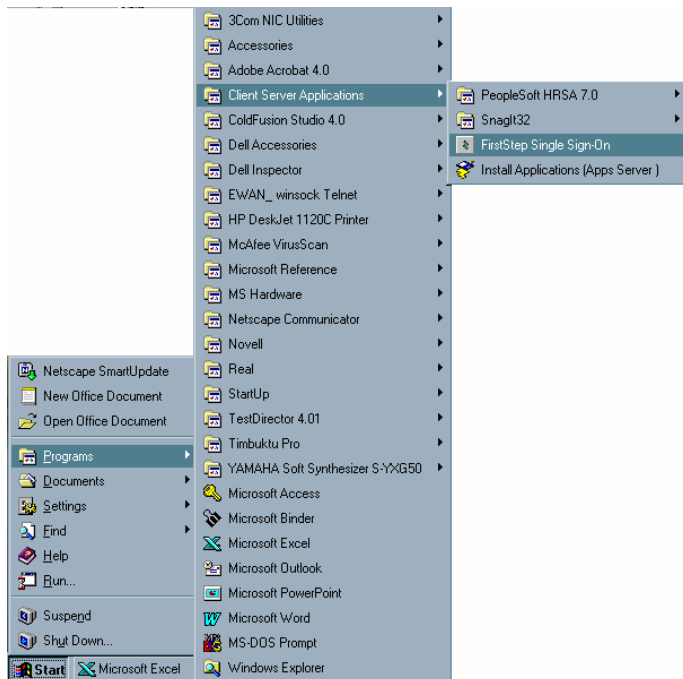
Signing On to FirstStep

1. Double-click on the FirstStep icon on your desktop.



If you do not have the icon on your desktop, access FirstStep through the Start menu:

From the Start menu – Programs, Client Server Applications, double click on FirstStep Single Signon.

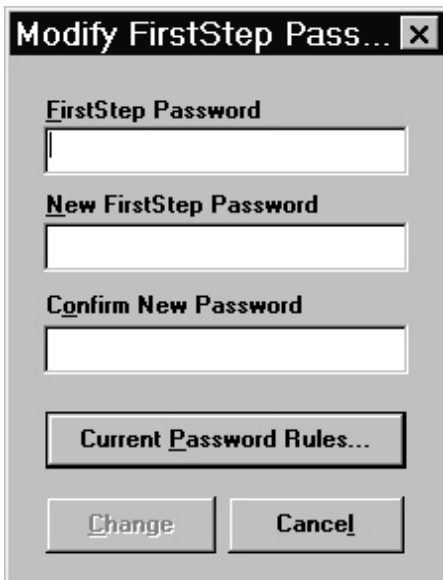


If FirstStep Single Signon is not installed on your machine, click on the Install Applications (Apps Server) link. Select First Step for XP from the list and click Install.

2. In the login window that appears, enter your SSO user ID (login) and password. Click **OK**, or press enter.



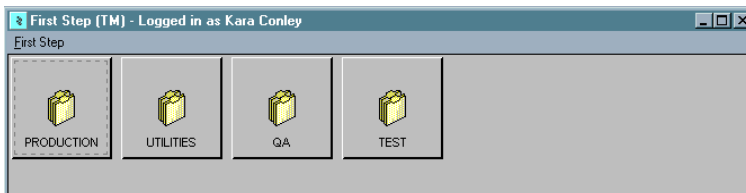
If this is the first time you have signed on to FirstStep, you will be prompted to change your password:



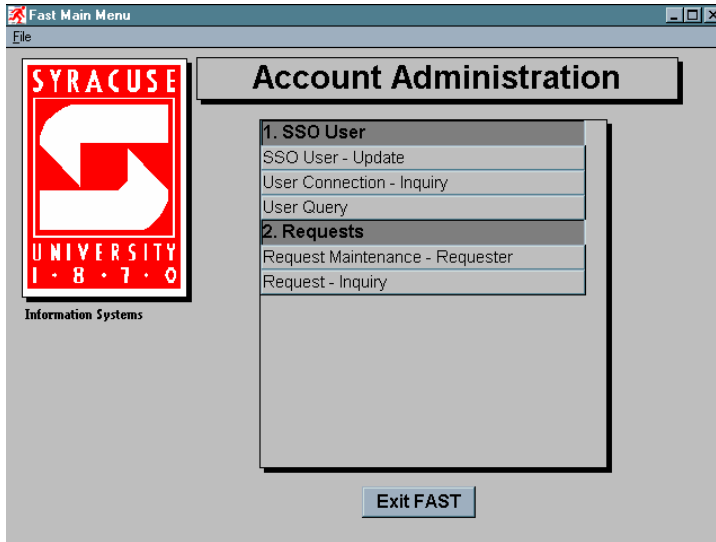
Enter your original password in the “FirstStep Password” box, then enter your new password following the password selection rules below:

Passwords...

- Must be at least 7-8 characters
 - At least 1 number
 - At least 1 special character
 - Cannot use { } < > + ^ ~ % “
3. Once you have successfully logged on, depending on the resources for your account, you may see a variety of buttons similar to those shown below. Click on “Production” to select the production system.



- The Production Menu Screen appears. Single click on the "FAST SSO Administration" button. This will bring you to the FAST **Account Administration** menu screen.



SSO User Update

Use this screen to:

- add a user
- update a user's Disclosure Status
- unlock an account
- reset a password
- lock an account (because the user has left your department, left the University or gone on a Leave of Absence)

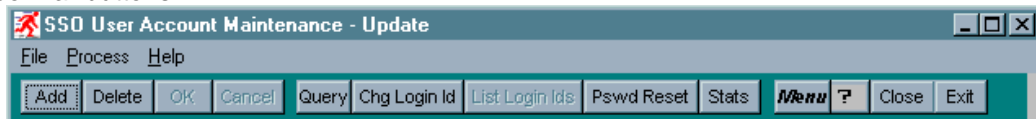
Single click on SSO User Update.

FirstStep FAST automatically loads the user whose login is the highest in the alphabetical listing of logins. To look up a user in your department:

- bring your cursor over to the SSO Login ID box and either double click on the login in the box or drag your cursor over the login to highlight it.
- Type in the login of the user you want to look up and press tab. At the top you will see the user's SSO Login ID, which should be the same as the user's Novell login or Email name. If this login is not consistent with the user's Novell login please contact ITS Help at x2677 and report the problem. They will make an effort to make the two id's the same.

Using the SSO User Account Maintenance - Update Screen

- Tool Bar buttons



- Add** To add a user
- Delete** This button is only available to System Administrators
- OK** When a change is made to the screen, you must click this to apply and save your changes.
- Cancel** To cancel whatever change you have made to the screen
- Query** This is a shortcut button to the Query screen
- Change Login ID** This button is only available to System Administrators
- List Login ID** This button is only available to System Administrators
- Pswd Reset** Allows Information Coordinators to change passwords for users in their departments.
- Stats** Gives information about when the user account was created and updated.
- Menu** Takes you to the FAST Account Administration menu.
- ?** Connects you to the Help screens that are specific to the screen you are currently on
- Close** Will close the screen you are currently in and bring you back to the FAST Account Administration menu screen.
- Exit** Will close you out of FAST altogether, and bring you back to the FirstStep Production Menu (where your connection 'buttons' are.)

- To the right of the SSO Login ID is the user's SUID number and name.
- Underneath the SSO Login ID you will see a white box with the following items in it:

Start Date This is the date that the user's FirstStep account was created, not the date that the user started working at the University.

Expiration Date This item is currently not used, and should be left blank.

Disclosure Code Note the pull-down arrow to the right of this line. The Disclosure Code status refers to whether the user has signed the Syracuse University Employee Acknowledgement Form.

The four choices under disclosure status are:

e-not sgnd = Employee, Acknowledgement Form Not Signed

e-sgnd = Employee, Acknowledgement Form Signed

s-not sgnd = Student, Acknowledgement Form Not Signed

s-sgnd = Student, Acknowledgement Form Signed

Disclosure Date This is the date that the Disclosure Code was last updated. Usually this will be the same date that the FirstStep Account was created, but it does not have to be. If an Information Coordinator has updated the Disclosure Code status after the FirstStep account was created the Disclosure Code date would be different from the Start date.

Sponsor SUID If a user is considered a 'Guest' for any reason, either because the user is a temp worker, consultant or visiting faculty member who is not being paid directly by the University, or the user's employment data has not been processed by Wage and Salary at the time that the Information Coordinator is updating the user's FirstStep account), the user's account will need to be sponsored by a permanent employee. Once the SUID number of the sponsor is typed into the Sponsor SUID line and the screen is updated (by pressing the OK button on the toolbar at the top of the screen) the Sponsor's Name will be automatically filled in for you.

- On the right hand side of the screen is a box with the following information:
Note: The data for these fields comes directly from Human Resources and is not updateable by Information Coordinators. There is a one-day delay on this data, as FirstStep is updated nightly from HR data files. If you notice any errors in this data, contact the Department of Wage and Salary.

Status Whether the user is an Employee, Student or Guest

Dept	If the user is an SU employee, the department number and name will default in.
Position	The PIN of the employee, along with the job title.
College/Yr Term	Will default in for students.
Email	Will default in for both employees and students

- On the lower left hand side of the screen are the following boxes

Require Password Change Whenever a new account is created, and an initial password is assigned (or if the user's password is reset, either by their Information Coordinator or a consultant at the ITS call center) the system automatically requires the user to change their password when they next log on. This is a security measure that ensures that only the user of the account has the access password. Data Custodians can also force a password change (by 'clicking' in the Require Password Change box) if they add a connection to the user's account that requires a password 'synch'.

Permanent Account At this time all accounts are considered permanent so this box should not have an "x" in it.

Locked If the user's FirstStep account is locked this box will have an 'x' in it, and the date the account was locked will be to the right of the box. There will also be an explanation of why the account was locked under the login of the user who locked the account.

- On the lower right hand side of the screen is information regarding the usage of this FirstStep account. FirstStep keeps a log of the last usage date, times used, password changed date and last password violation date, -the information is stored here.

Adding a New User

In FirstStep FAST each user account has to be manually added. You need to give the user an account, so that you can request connections for that user.

Adding a user is an easy process in FirstStep FAST. You will need to know three things:

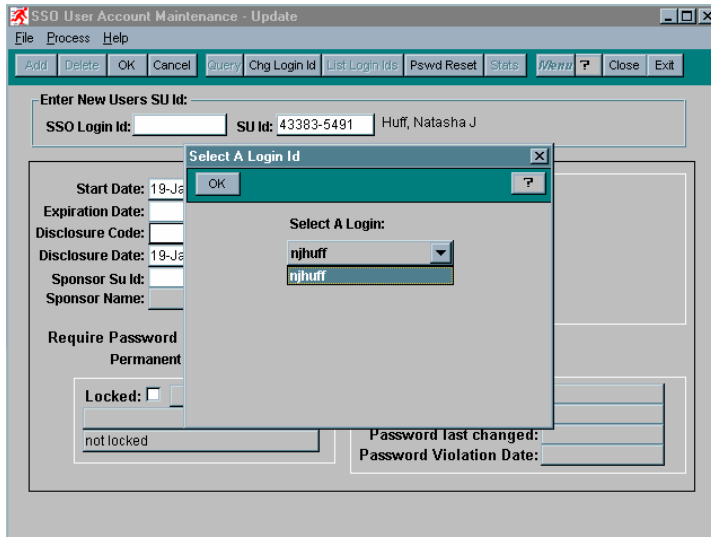
- the user's SUID number
- whether or not the user has signed the Employee Acknowledgement Form
- the user's Novell login (or email name).

Now you are ready to add a user:

1. Click on the **Add** button on the toolbar at the top of the screen. This should 'blank out' your screen and bring your cursor to the SU Id box. (Note that the toolbar options are now grayed out, except for the Cancel button.)

Type in the SUID number of the user in the SU Id box, and press enter.

A window will open asking you to select a login for the user. You should click on the pull-down arrow to the right of the suggested login to make sure that there aren't more login options.

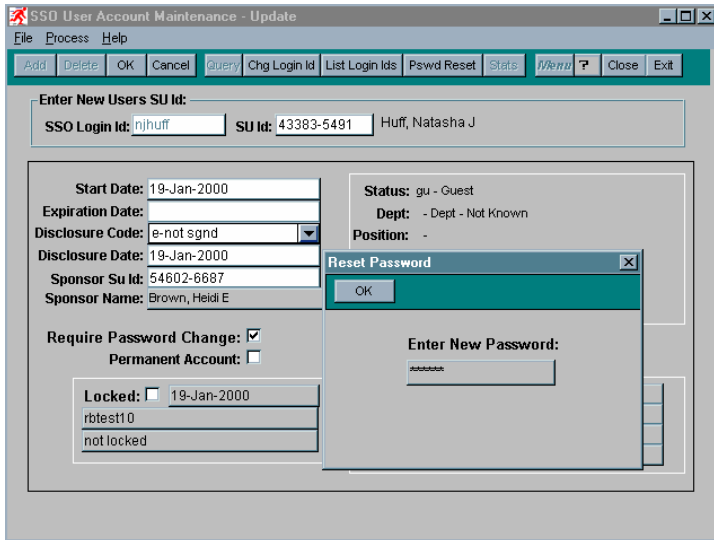


If there is only one login, choose that one - if there is more than one, either check with the user (if the user is available) or choose the login that makes the most sense. (example: if you see a login that is a combination of 3 letters and 2 numbers, along with a login that has more letters and resembles the user's name, choose the latter login).

2. Click on the OK button on the top left corner of the small window.
3. Update the Disclosure Code status. If the user has not signed the Employee Acknowledgement you would choose e-not sgnd. Please note: most Data Custodians, or Approvers, will not grant access to connections unless they can tell that the user has signed that form.

If you have the user sign the form after you have created the initial FirstStep account, don't forget to go back to SSO User – Update and update the Disclosure Code status.

4. After you have chosen the appropriate Disclosure Code status, update the screen by pressing the OK button located on the toolbar at the top of the screen. A window will open and you will be asked to type in an initial password for this account.

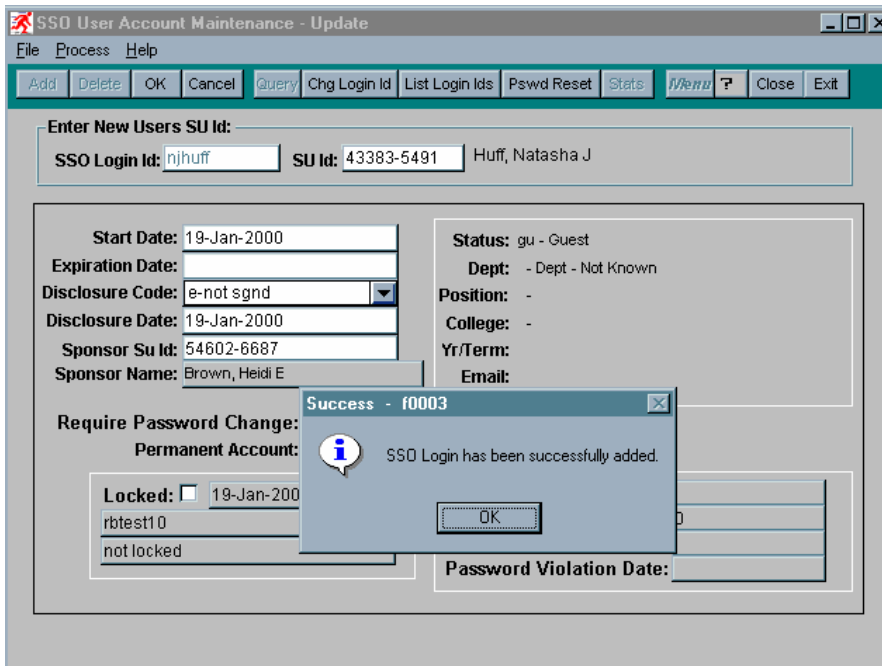


This password must be between 6 and 10 characters long and, unlike FirstStep user passwords, does not need to contain any numbers.

(You can use whatever you'd like to for an initial password, as you will be able to tell your user what their password is.)

Once you have typed in six characters the OK button in the window will light up. When you have finished entering the password, press OK to update the account. Another window will appear, asking you to confirm the password. Retype the password and click OK. To complete the addition of this new account, click on the OK button in the toolbar at the top of the screen.

A message window will open telling you that the account has been successfully created. Click OK.



Locking Accounts and Resetting Passwords

There are several reasons a user's account could be locked:

- **Password Violation:** FirstStep automatically locks an account if the user types in the wrong password three times. If this happens to one of your users, you, as the Information Coordinator, can unlock the user's account and (if need be) reset the user's password
- **Left SU:** If an account is locked for this reason check the date that the account was locked (to the right of the Locked box). If this date is not current and this is a new employee in your department you might want to check with the employee to see whether they have worked at the University in the past. If so you can unlock the account and request connections for the user. If any connections exist they will be obsolete or locked by the Data Custodian or Security Administrator.

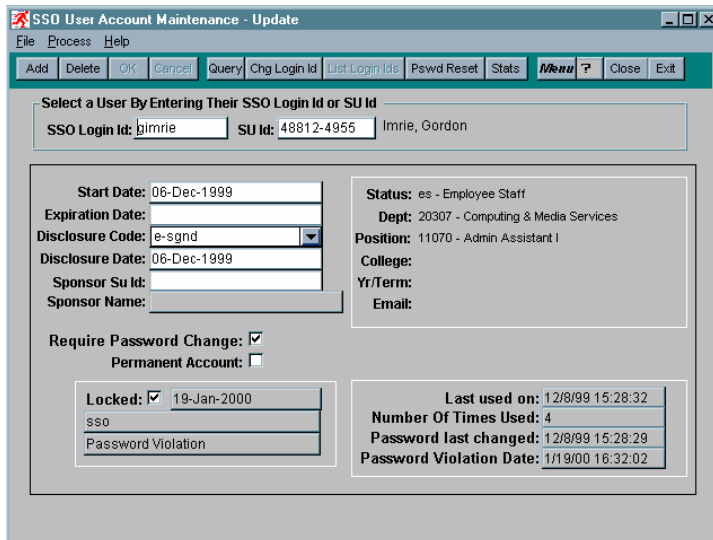
If the user has been a steady employee in your department, but their FirstStep account has been locked for this reason, check the Status of the employee. If they are listed as a Guest or a Student:

- Contact Wage and Salary and check that this user is correctly identified by Human Resources as an active employee.
- Contact the Security Administrator who locked the FirstStep account (their login will be below the Locked box you should be able to use this login to email them, by adding '@syr.edu'). Explain to the Security Administrator that the user is still employed by the University and is working in your department.
- **Administrator Lock:** Placed by FirstStep System Administrators when they are doing an update to FirstStep. Do not unlock the account, email the System Administrator who locked the account for further information on how to proceed.
- **SSO User Delete Failure:** Generated by FirstStep (similarly to the Password Violation lock). This lock is generated when an attempt to Delete the user is unsuccessful. As System Administrators rarely delete a user this lock is rarely generated. If you see this lock, email issecsd@syr.edu. Do not unlock the account unless you are instructed to by a system administrator.
- **Short Work Break:** Used only for temporary workers who are kept active in the system but only work for short periods of time (for example, Registration Temps). Instead of removing these user's access and re-applying it each time the users come back to work at the University the Data Custodian (or Approver) locks the user's connections and may lock the user's accounts. When one or all of these users come back to the University the Information Coordinator may unlock the users' accounts, but should check to see if the users' connections are locked. If they are, the Information Coordinator will need to send in a FAST request to get them unlocked.
- **Changed Department:** Information Coordinators should use this when an employee stays within the University, but changes departments. You do not have to lock the account if the user is moving from one area of a department to another (i.e. one area of SUCE to another) within your area of responsibility. If you have a user who has come to your department from another department on campus and the user's FirstStep account is locked for this reason you can unlock the user's account. You will also need to look at the user's connections and request updated access for this user depending on their job responsibilities. You may also need to request that some connections be deleted if they are no longer needed. If the connections are locked due to the department change you will also need to re-request those connections.

- **Leave of Absence:** Information Coordinators should use this when a user in their department has taken a Leave of Absence. The Information Coordinator may unlock the account when the user returns to work.
- **ABUSE – Security Risk:** Used by Information Coordinators, Data Custodians (Approvers) or FirstStep Security Administrators in situations of extreme security risk. If you see this lock on a user’s account DO NOT unlock the account! Contact the person who locked the account immediately for further instructions.
- **Locked for Maintenance:** Used by FirstStep System Administrators when maintenance is being performed on FirstStep. This lock is rarely used. If you see this lock on a user’s account please contact the person who locked the account.
- **Needs Training:** Used by FirstStep Security Administrators when it becomes apparent that a user is having extreme difficulty using FirstStep. FirstStep provides Security Administrators with an Activity Log of usage. If a user is consistently locked out of FirstStep due to password violations the Security Administrator may lock the user’s account. This is rarely done, and only done if the Security Administrator is unable to resolve the problem through either contacting the user or the user’s Information Coordinator or both. If a user has this lock on his or her account you may unlock the account, but please contact the person who placed the lock on the account.

To Unlock the account:

Go to SSO – **User Account Maintenance - Update** and put the user’s login into the SSO Login ID box and press enter. This will show you the user’s account information.



In the bottom left corner of this screen you will see an 'x' in the Locked box, and the explanation on the bottom line under the login of the user who last updated this account.

Bring your cursor over to the Locked box and click in the box to remove the 'x'. Update the screen by clicking on the OK button on the toolbar at the top of the screen.

An informational window will open telling you that the account has been successfully updated. Click OK.

It is not necessary to reset the user's password when you unlock an account. Ask the user if they know their FirstStep password - sometimes a user will type in their Novell or Mainframe password in error. If this is the case and the user knows his or her FirstStep password then all you would need to do is unlock the user's account.

To Reset a Password

If the user has forgotten his or her password you can reset the password by clicking on the Pswd-Reset button on the toolbar at the top of the **User Account Maintenance - Update** screen.

The Reset Password window will open. (This is the same window you saw when you created a password above.)

This password must be between 6 and 10 characters long and, unlike FirstStep user passwords, does not need to contain any numbers.

Once you have typed in six characters the OK button in the window will light up. When you have finished entering the password, press OK to update the account. Another window will appear, asking you to confirm the password. Retype the password and click OK. To complete the addition of this new account, click on the OK button in the toolbar at the top of the screen.

A message window will open telling you that the account has been successfully created. Click OK

Notice that the Require Password Change box has an 'x' in it. This means that when the user logs on using the temporary password you assigned him or her, the user will be forced to change his or her password.

If a user comes to you because his or her FirstStep account is locked and you find that the account is locked for a reason other than a password violation, you may need to assess this information and take other measures, as described in the reasons above.

User Connection-Inquiry2

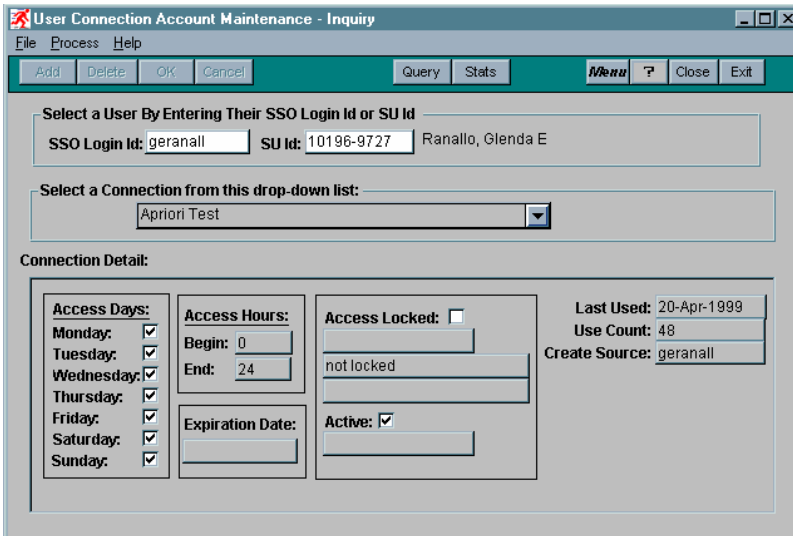
Use this screen to find out what connections a user already has and information about each specific connection.

This is an Inquiry (look only) screen. You cannot update this screen and cannot add or delete connections from this screen. To request connections or the deletion of connections you will need to use the **Request Maintenance – Requester** screen.

One of the nice things about FirstStep FAST is that it will take the user from screen to screen. For instance, if you look up a user in the **SSO User – Update** screen, then go to the Menu and click on **User Connection – Inquiry**, that same user's information will appear on the new screen.

The top third of the screen: information about the user:

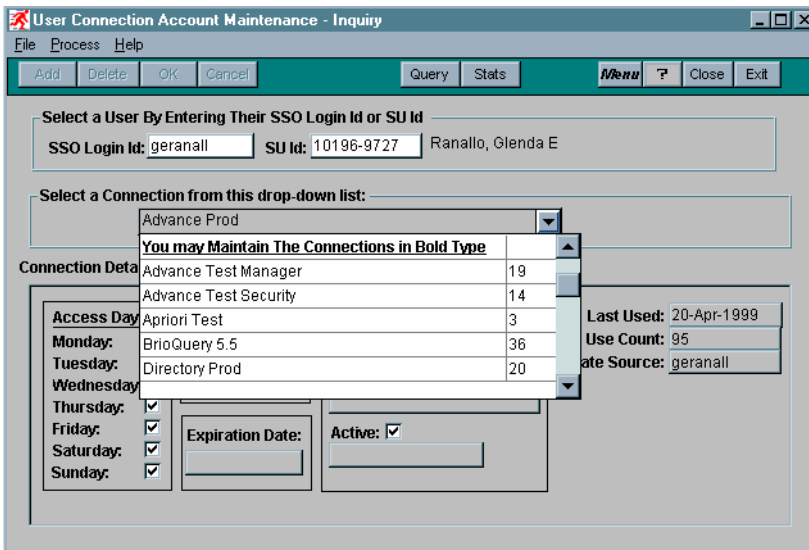
- SSO Login ID
- SU ID number
- Name



The middle part of this screen: the user's connections.

To Select a Connection, view the connections that the user has access to by clicking on the down-arrow to the right of the Connection box.

If the user has more than five connections you will see a scroll bar on the right side of the window that has opened. Use this scroll bar to look at the user's connections and choose the connection that you want to find out more information about.



The bottom portion of this screen: information specific to the connection selected in the middle part of the screen.

Information includes: Access Days, Access Hours, and the connection Expiration Date. Currently, access is 24 hours/day, 7 days a week access to all connections within FirstStep. Expiration dates are not currently used, so that box should be empty.

Additional connection information listed includes: Access Locked data, Active data and connection usage data.

If access to a connection is locked you will see a Lock Reason and the login of the person who locked the connection. Connection lock reasons are the same as Account lock reasons, please refer to "Locking Accounts and Resetting Passwords" for details.

If the connection is active there will be an 'X' in the Active box. A connection may be changed from an active status to an inactive status due to an upgrade of the application software, (where a new connection is created), or if an application has become obsolete and is no longer being used at the University. The connection is first made inactive, then the FirstStep System Administrators delete the individual connections.

The right side of the screen: information about the usage of the connection.

Last Used when the user last clicked on the connection 'button'. This does not necessarily mean that the user was able to connect to the application successfully, it just means that an attempt to connect was made.

Use Count a running total of the number of times the user has clicked on the connection 'button'.

Create Source the login of the Data Custodian or Approver who assigned the connection to the user.

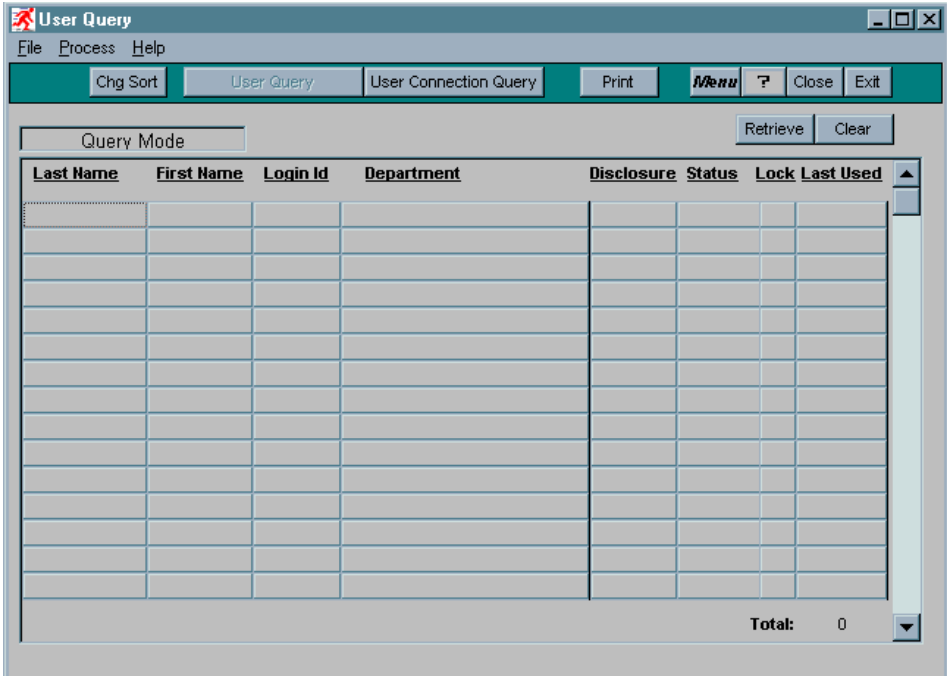
As this is an Inquiry screen you cannot make changes to the connection information listed. This screen is helpful as a first step in troubleshooting access problems for users. If a user comes to you because he or she cannot get into a FirstStep connection, check this screen to see if the user's connection is locked for any reason. If you see that a user's connection is locked, contact the person who locked the connection for more information.

If the account is not locked and the user cannot log on, call the ITS call center at x2677 to report the problem.

You might also use this screen when you have a new employee who will need the same access as an employee who is currently working in your department. You can go to this screen and find out what connections the new user will need. Then you can go to the Request Maintenance – Requester screen and request those connections.

User Query

The User Query screen is a tool to help you find user's logins, run reports about users in your department, and run reports about user connections.

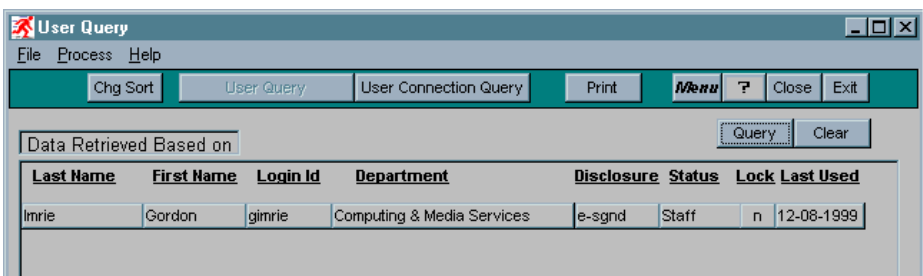


You can run two types of queries from this screen:

- look at users' FirstStep accounts
- look at user's FirstStep connections.

User Query - (notice that this option is 'grayed out' on the tool bar). You can use this query if you need to look at a user's account but you don't know their login. Bring your cursor over to the Last Name box and type in the user's last name.

NOTE: this query is case sensitive, so you must capitalize the first letter of the last name.



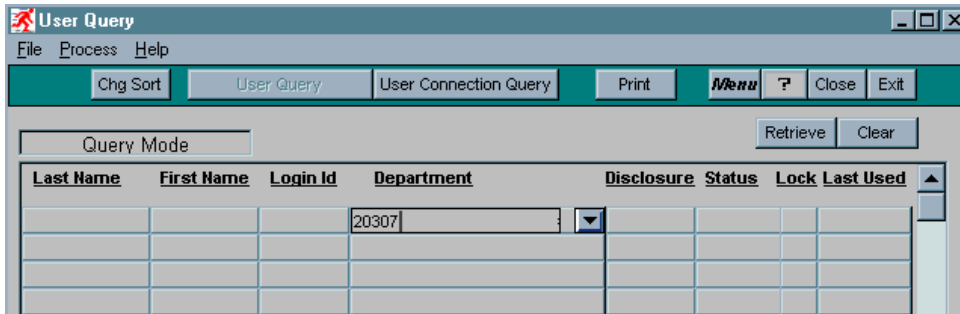
Press the Retrieve button on the right side of the screen.

In this case there happens to be only one user with this last name (note the Totals figure in the lower right corner of your screen will reflect the number of users retrieved).

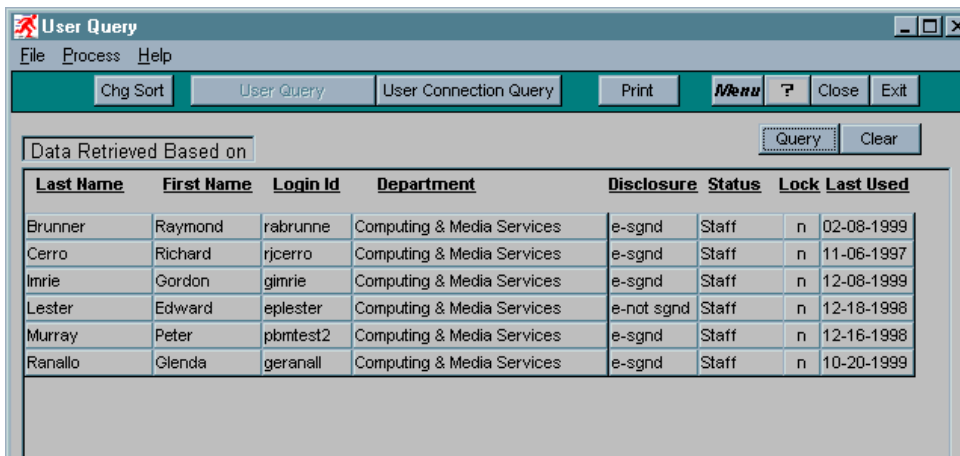
When you open the User Query screen, the last screen you were in stays open, but is minimized. This allows you to toggle back and forth from screen to screen. If you double click on the desired line of this query it will bring you back to the screen that was previously open and load that user's information on that screen.

Department Query - Clear the screen by clicking on the Clear button (to the right of the Retrieve button). Bring your cursor over to the Department line. You can run a Department Query two ways. You can type in the Department number (or numbers, as long as you put each number on

a separate line) or you can click on the pull-down arrow and scroll through the alphabetical listing of Departments and choose one of those.

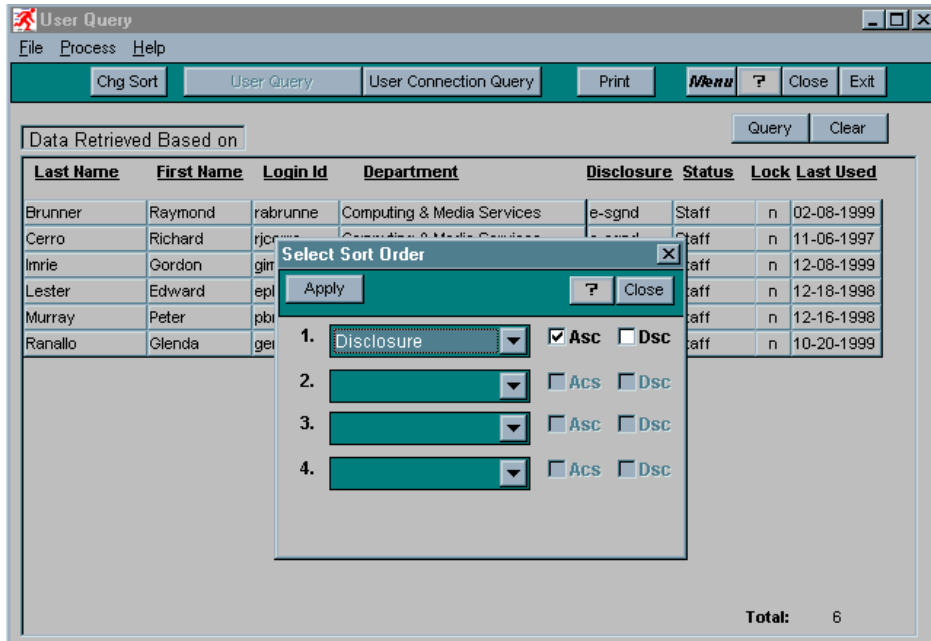


Click on the Retrieve button to get your results.



This query is sorted by last name. If you wanted to have a report of the users in your department you could use the Print button on the toolbar to print out this report.

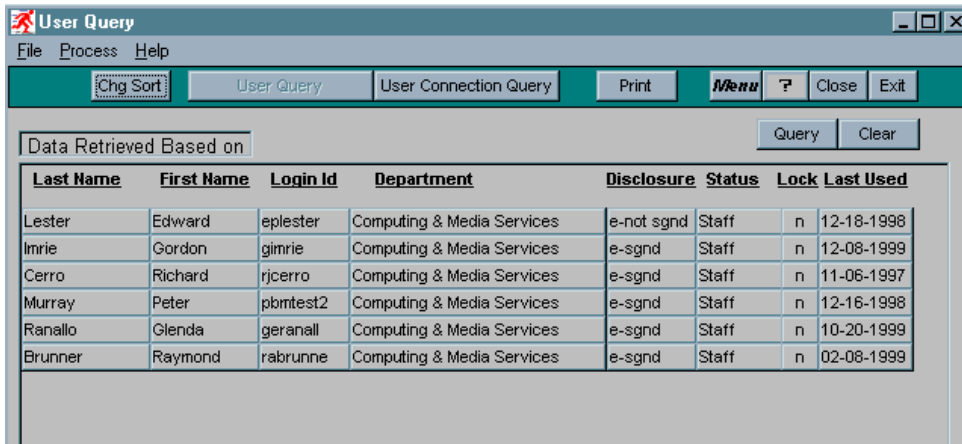
Sorting the report - for example, all the users in your department where the Disclosure Status is e-not sgnd. Click to the Chg Sort button on the left side of the toolbar. This will open a window that will give you the option of sorting your results with up to four criteria.



To change the sort order click on the pull-down arrow of the first green box. This will give you the various sort options.

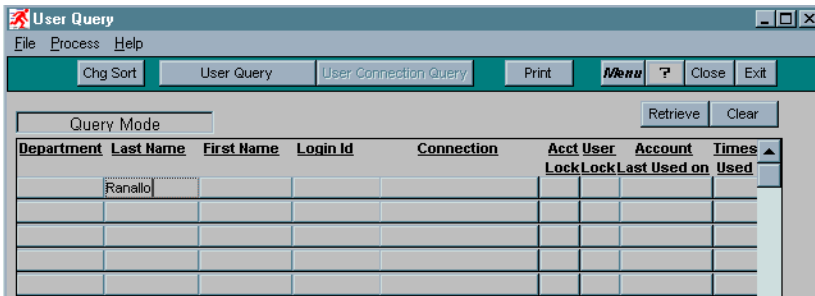
In this case we are going to choose the Disclosure option and we will sort it in Asc (or ascending) order. Click on the Apply button. This will close the window and change the sort of this query.

Now you will notice that all the users with the e-not sgnd Disclosure status are listed first.



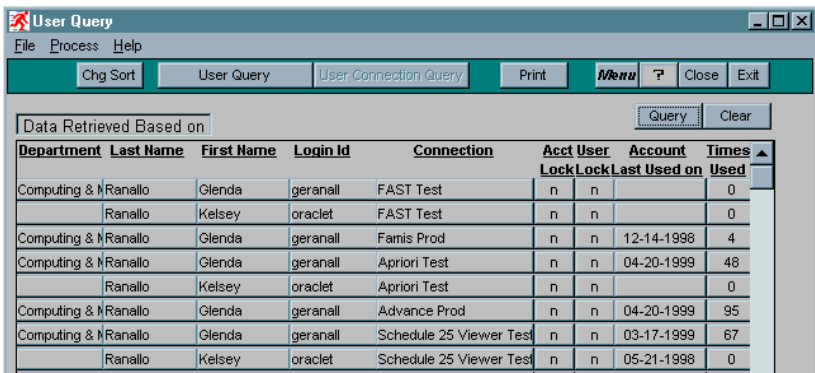
Now let's look at the User Connection Query. To do this you will need to click on the User Connection Query button on the toolbar at the top of the screen.

A new query screen will open



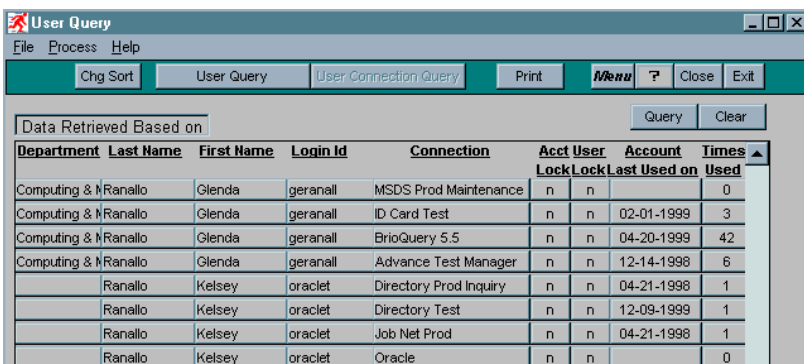
To find out what connections a specific user has you would either type in the user's last name in the Last Name column, or you could type in the user's login in the Login ID column.

Click on the Retrieve button to get your results.



If you wanted to look at more than one user you could type one last name or login per line then click on the Retrieve button to get your results.

To sort the query in a different order, you would click on the Chg Sort button and select the sort order that you would like and click on Apply.



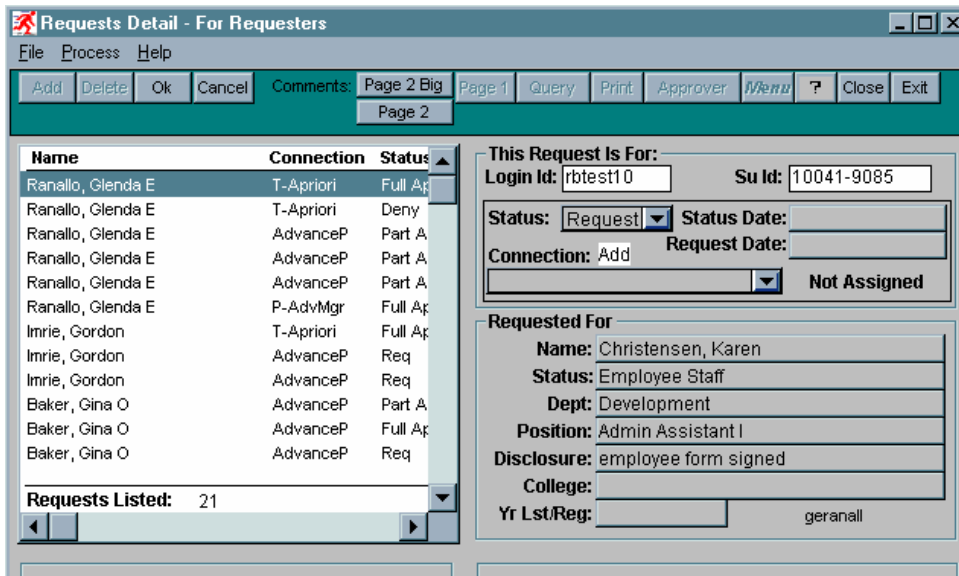
Request Maintenance-Requester:

One of the major responsibilities of an Information Coordinator is to request access for users in the Information Coordinator's department(s). Use this screen to request connections (or the deletion of connections) for your users and to check on the status of previously placed requests.

To request connections for users in FirstStep FAST go to **the Request Maintenance – Requester** screen.

The Toolbar at the top of the screen:

Add	Use this when you want to create a new connection request
Delete	Use this to delete a request you have already made
OK	To update the screen (save changes)
Cancel	To cancel any changes you have made
Page 2 Big	opens the 2 nd page as a full screen.
Page 2	opens the 2 nd page as a half screen, overlaying the right side of the present screen (or Page).
Page 1	will bring you from the 2 nd page back to the 1 st page.
Query	button connects you to a query screen of the data in the Request Activity box.
Print	Will allow you to print a hard copy of a request. The request will be formatted to fit on one or two pages, depending on the length of the Request Information. You do not need to click on the Print button for each page of the request.
Approver	Displays who the Approvers of a connection are. The approvers listed in this window will be specific to the connection requested currently on Page 1.
Menu	Will return you to the FirstStep FAST Account Administration main menu.
?	Displays the Help screens.
Close	Will return you to the FirstStep FAST Account Administration main menu.
Exit	Will exit you out of FirstStep FAST and bring you back to the FirstStep PRODUCTION menu.



The white box on the left side of the screen is the Request Activity box.

The Request Activity box provides a short description of the requests made for the Information Coordinator's department(s). If no one has ever placed a request for the Information Coordinator's department(s) this screen will show all of the requests made across campus. The information listed in this box is the User Name, Connection Requested, and the Status of the request. The information surrounding the Request Activity box is specific to the highlighted line in the Request Activity box.

To the right of the Request Activity box is information about the user, and the connection requested for the user.

Login ID the user's login

Su ID the user's SUID number

Status status of request (approved, deny, etc.)

Status Date date request was last updated

Request Date show when the request was first made

Connection shows what connection was requested. (Since this request was approved there is an indication that the connection was Assigned to the right of the Connection box.)

Requested For information about the user

Approved By information about the approver (or Data Custodian)

Requested By information about the requester (or Information Coordinator).

Page 2 of this screen is where the Approver and Requester communicate with each other. The FirstStep FAST request screens include Request Information Templates written by the Approvers which, if filled out accurately by the Requester, will tell the Approver what access is needed.

Processing a request

Begin by clicking on the Add button on the toolbar. This will 'light up' the Login Id box and the Su Id box to the left of the Request Activity box. Either double-click on or drag your cursor over the login name to darken it.

Type in the login of the user for whom you will be making a request and press enter.

The Requested For information will update to show data about the user you are making the request for. The next thing you may want to do is update the Status box below the Login Id box. Most of the time you'll want to leave the status as Requested. Click on the pull-down arrow to the right of the Status box to show the status options.

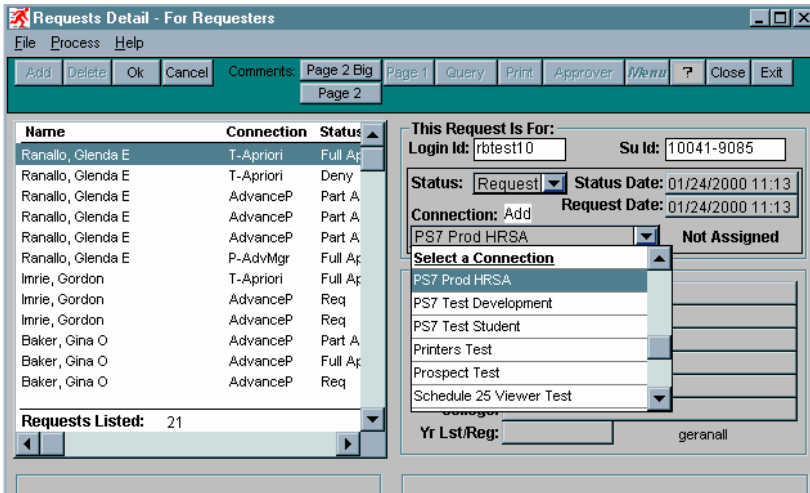
Information Coordinators may use the following statuses:

- Draft** Use this option when you are working on a request and find that you need more information before you can send the request to the Approver. When a request is in the Draft status it will not be seen by the Approver(s), so remember to change the status from Draft to Request when you are ready to send the request.
- Request** Use this status when you are making a request for a connection for a user. This is the default status.

The following status options are used only by Approvers (Data Custodians)

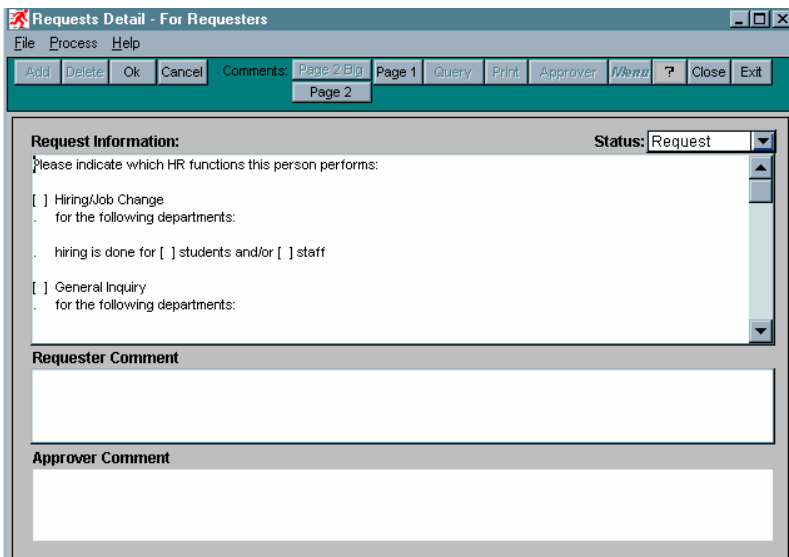
- Fully Approved** reflects that everything the requestor asked for has been approved.
- Pending** used by Approvers when there is more than one step involved in the approval process. (example: PeopleSoft Student requests are first approved by the owner of that data, the Registrar's office, then the actual assignment of the access in PeopleSoft is done by the PeopleSoft Security Administrator team. When the data owner approves access he or she changes the status of the request to Pending. This notifies the Security Administrators that this request is ready for them.)
- Partial Approved** Used when part but not all of the access requested has been approved and assigned to the user. This status is used to alert the Information Coordinator to look at the Approver Comments on Page 2 to see if further action needs to be taken on this request.
- Deny:** Used when a request has been denied. If a request is denied the Approver must tell you why. You will find the explanation on Page 2 under Approver Comments.

The next step in processing this request is to choose the connection the user needs. Click on the pull-down arrow to the right of the Connection box.



An alphabetical listing of all of the connections available in FirstStep is revealed. Something to keep in mind is that for the average user (as opposed to a programmer or tester) you will only want to request PROD(uction) access. Disregard connections that are for the Test, QA, or Training environments unless the user specifically asks for that type of access.

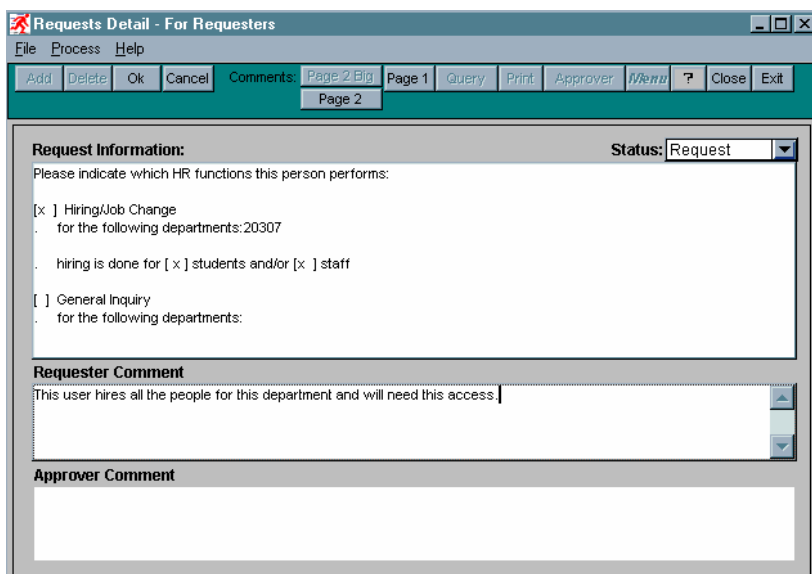
The next step is to click on either of the Page 2 buttons on the toolbar. Page 2 Big may be easier to use, as you can see more of the Request Information at one time.



Click anywhere within the top white Request Information box and you will see a scroll bar on the right side that will allow you to scroll through & type in the box.

You will need to read through the entire template in the Request Information box and choose the options that are appropriate for your user's access needs. If at any time you feel that you do not have enough information to complete the request, you may want to change the status of the request to Draft. To do this, click on the Status box above and to the right of the Request Information box, choose Draft, and then click on the OK button on the toolbar. At this point, you may want to print a copy of the request and give it to the user to fill out. When the user returns the printed copy to you then go back to Request Maintenance – Requester and update the request. Don't forget to change the status of the request from Draft to Request!

After you have filled out the Request Information box you may want to add a comment in the Requester Comment box, giving additional information about why this user needs this access. Give a short description of the user's job duties. Also, if you need to set up a new user to look like an existing user in your department, you could add that information here.



Once you have completed the request you will need to click the OK button on the toolbar to send the request to the Approver. This will open up an informational window telling you that your request has been updated. Click the OK button in the window to complete the request.

Return to Page 1 by clicking on the Page 1 button on the toolbar. You can see that the request has been added to the Request Activity box. If several days go by and your request has still not been processed, you can click on the Approver button to find out who the data custodian is for this connection. You can email any of the Approvers to ask them about the status of your request.

Something to remember is that each connection has a Request Information template and Approvers specific to that connection. You must go to Page 2 of the Request Maintenance – Requester screen and complete this information. If you forget this part of the request process your request will probably be denied.

Processing a FAB Access Request

It is recommended that the appropriate Budget Manager or Grants Director fill out a “Fast Access Request Form” prior to the Information Coordinator beginning a FAB related connection request. The form can be found at the following url: <http://bfasweb.syr.edu/forms/sitemap.cfm>.

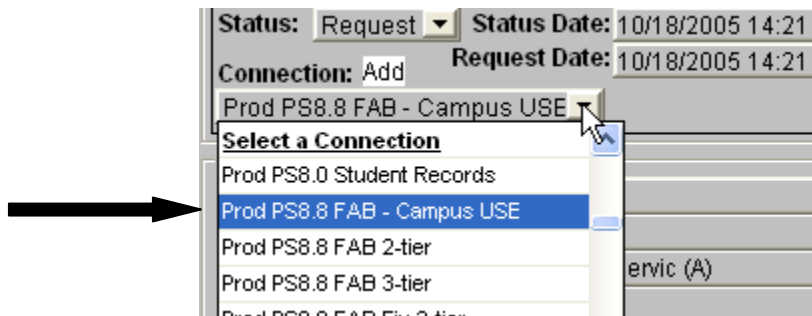
Begin the connection request by clicking on the Add button on the toolbar. This will ‘light up’ the Login Id box and the Su Id box to the left of the Request Activity box. Either double-click on or drag your cursor over the login name to darken it.

Type in the login of the user for whom you will be making a request and press enter. The Requested For information will update for this user.

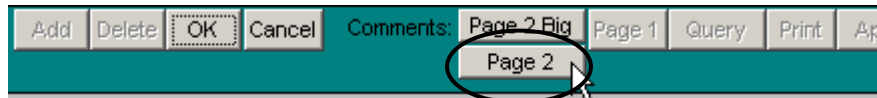
The next step in processing this request is to choose the connection the user needs. Click on the pull-down arrow to the right of the Connection box. Select the appropriate financials related connection from the drop down list.

Connection Name	Used For
Prod PS8.8 FAB – Campus Use	Staff who do not work in a financials “back office”

In this example, Prod PS8.8 FAB – Campus Use has been selected.



The next step is to click on the Page 2 button on the toolbar. (do not use the Page 2 Big option)



Note that the Page 2 screen for Financials related connections is different from Page 2 for all other connections. Scroll through the Request Information box (top right white box) and fill in the information as needed – department/program, type of access needed, etc.

Add Delete OK Cancel Page 2 Big Page 1 Query Print Approver Menu ? Close Exit

Page 2

Name	Connection	Status
Allis, John G	P-S25EView	Full Ap
Anderson, Erik S	PF88AP	Full Ap
Anderson, Erik S	P-FAST	Part Ap
Anderson, Erik S	PRemAcc	Full Ap
Anderson, Erik S	T-AdvSecO	Full Ap
Anderson, Erik S	Tps7OapD2t	Full Ap
Anderson, Erik S	Tps7OappT5	Full Ap
Anderson, Erik S	ZZ-Apriori	Full Ap
Anderson, Erik S	ZZOMasting	Deny
Anderson, Erik S	ZZP-Brio65	Full Ap
Anderson, Erik S	ZZPS76DV3	Full Ap
Anderson, Erik S	ZZPS76GF	Full Ap

Requests Listed: 1049

Request Information: Status: Request

Prod PS8.8 FAB - Campus Use

General Ledger

Enter Chartfield Information for access:

All Department Access: _____
or
Department/Program: _____

Needs Access to:
(choose all that apply)

Chng Has	Privilege Description	Assigned
<input type="checkbox"/>	Budget Manager	<input type="checkbox"/>
<input type="checkbox"/>	Department Accounting Staff	<input type="checkbox"/>
<input type="checkbox"/>	Dept Acct Staff w/ My Code A	<input type="checkbox"/>
<input type="checkbox"/>	Data Entry Clerk	<input type="checkbox"/>

Requester Comment

Approver Comment

New Boxes

The next box down on the right is the Privilege box. Scroll through the privileges to find the one that is needed. A staff member who has current financials access will have a check mark in the smaller white box next to the privilege name. If you have questions about what a particular privilege is, you can click on the privilege name and the description will appear in the box to the left.

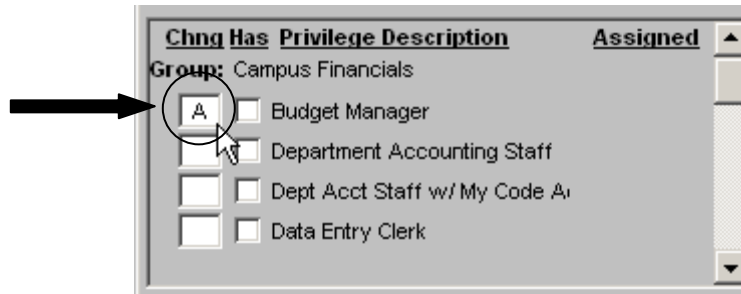
Requests Listed: 1049

Budget Manager This role is for staff who need access to do budgeting, financial, personnel and may also do grants work. If the client needs to originate journal entries, he will also need the Journal Data Entry role. If he will request or approve requisitions, he will need to have the ePro requester and/or the ePro approver role - whichever applies.

Chng Has	Privilege Description	Assigned
<input type="checkbox"/>	Budget Manager	<input type="checkbox"/>
<input type="checkbox"/>	Department Accounting Staff	<input type="checkbox"/>
<input type="checkbox"/>	Dept Acct Staff w/ My Code A	<input type="checkbox"/>
<input type="checkbox"/>	Data Entry Clerk	<input type="checkbox"/>

Requester Comment

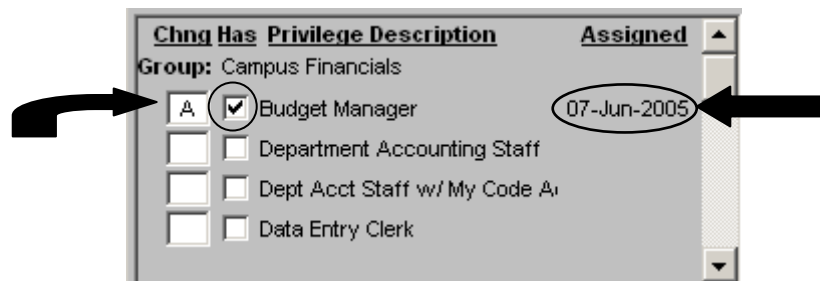
To request access for a privilege that the staff member does not have, click in the leftmost, larger, white box in the row of the desired privilege. An "A" will appear in the box. If you have clicked a box in error, click the box again and the "A" will disappear. If this request is just changing details – for example, changing or adding a department – you do not need to click anything in the privilege box.



Fill in the Requester Comment box with your initials, the date, and any information you would like to convey to the Data Custodian. If you would like to enter more information that will fit in the Requester Comment box, you can add your information to the bottom of the template box.

Press the OK button. An email will be sent to the appropriate Data Custodians.

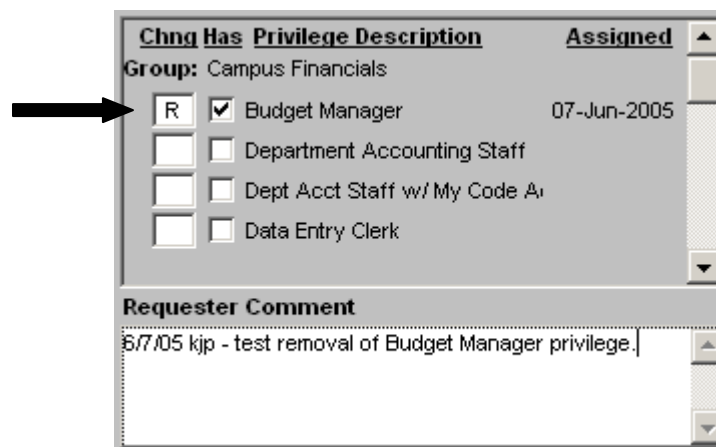
Once the request has been approved, the privilege box will show a check mark, in the "Has" column, next to the assigned privilege, and the date that the privilege was assigned.



Removing a Privilege

To request the removal of a privilege that a staff member currently has, you have to start a new request by clicking on the Add button, filling in the Login Id and selecting the appropriate connection from the Connection drop down list.

Go to Page 2 and click on the leftmost box in the row of the privilege to be removed and an "R" will appear. Fill in the Requester Comment box with why you are asking for this privilege to be removed.



Click OK. An email will be sent to the appropriate Data Custodians.

Once the privilege has been deleted, the “R” will remain in the leftmost box, but the check mark in the “Has” column will be gone, as will the date under the “Assigned” column.

Notes regarding processing FAB FAST requests

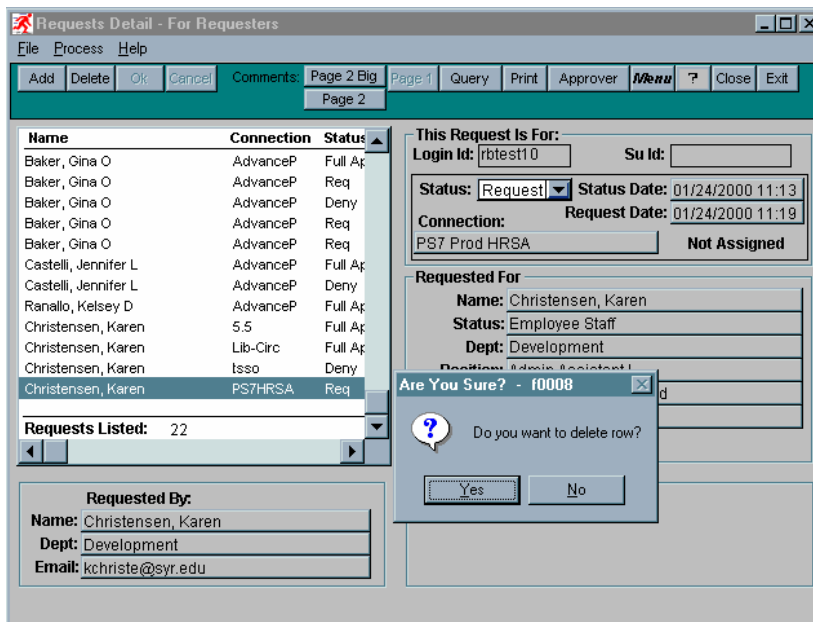
You can not add a new connection request for a staff member if there is another request for that same connection in “Request”, “Pending”, or “Draft” status.

After pressing OK (saving) a request, you can not go back into the request to change “As” and “Rs”. If you find an error in the request you can delete it from the connection request list if it is still in “Request” status. You will need to start over with a new request.

When a Data Custodian sets a Prod FAB request to “fully approved” or “deleted”, the user will be automatically provisioned that night. Access will be added, removed, or changed, depending on the access associated with the privileges that the user currently has assigned.

Deleting a FAST Request

If you realize that a connection you have requested is not needed by the user you can delete that request. Go to Request Maintenance – Requester, find the request in the Request Activity box, and click on it to darken it, then click on the Delete option on the toolbar.



An informational window will open asking you if you are sure you want to delete the request. Click on the Yes button to complete the delete process. Another informational window will open up telling you that this request has been updated. Click on the OK button to close the window.

Note: Only use the delete process if a request has not been acted on by an Approver. Check Page 2 to make sure that no action has been taken on this request. If the request has been approved or denied, or is in pending status DO NOT delete the request. If the user no longer needs a connection, and it has already been acted on by an Approver, create a new request and in the Requester Comment box explain that the user needs this connection deleted.

If a request for a connection has been denied, the Approver has to tell you why. Go to Page 2 of the request and look at the Approver Comment box. If the Approver needs more information from you, or you need to update the user's Disclosure Status (in the SSO User – Update screen), please do not update the denied request. Instead place a new request and include the pertinent information.

Querying the Request Maintenance – Requester Screen

Using the Query button on the toolbar of the Request Maintenance – Requester screen, you can query the requests that have been made for your department.

Click on the Query button to look at this screen.

Last Name	First Name	Sso Login	Connection	Req Login	Department	Status	Req Date
							MM DD YYYY
Ranallo	Glenda	geranall	P-AdvMgr	rbtest10	Computing & Media	Approval	12 17 1999
Imrie	Gordon	gimrie	T-Apriori	rbtest10	Computing & Media	Approval	1 21 2000
Imrie	Gordon	gimrie	AdvanceP	rbtest10	Computing & Media	Request	1 21 2000
Imrie	Gordon	gimrie	AdvanceP	rbtest10	Computing & Media	Request	1 21 2000
Baker	Gina	gobaker	AdvanceP	rbtest10		p	1 18 2000
Baker	Gina	gobaker	AdvanceP	rbtest10		Approval	1 19 2000
Baker	Gina	gobaker	AdvanceP	rbtest10		Request	1 19 2000
Baker	Gina	gobaker	AdvanceP	rbtest10		Deny	1 20 2000
Baker	Gina	gobaker	AdvanceP	rbtest10		Request	1 21 2000
Baker	Gina	gobaker	AdvanceP	rbtest10		Request	1 21 2000
Castelli	Jennifer	ilcastel	AdvanceP	rbtest10	Development	Approval	1 20 2000
Castelli	Jennifer	ilcastel	AdvanceP	rbtest10	Development	Deny	1 21 2000
Ranallo	Kelsey	oraclat	AdvanceP	rbtest10		Approval	12 1 1999
Christensen	Karen	rbtest10	5.5	rbtest10	Development	Approval	12 10 1999
Christensen	Karen	rbtest10	Lib-Circ	rabrunne	Development	Approval	12 10 1998
Christensen	Karen	rbtest10	tsso	geranall	Development	Deny	12 10 1998

Total Retrieved: 21

This query is sorted alphabetically by login. As this may not be the easiest way to find a specific request, you may want to change the order of this sort. Click on the Chg Sort button in the toolbar. A window will open where you can change the sort of the query. This is the same window you have become familiar with in the User Query screen.

To sort a query by Last Name, choose the Lastname,Firstname option in the pull-down menu, then click on the Apply button. The window will close and the query will be resorted.

You can also sort this query by Status, to look at all the denied or pending requests.

You can also create a query from this list and personalize it to suit your needs. Click on the Query button on the toolbar of this screen. This will give you a blank query screen where you can type in the login or Last Name of a specific user, or choose a connection to query, or even choose to look at all requests with a specific status. (example: all queries with a denied status)

Click the Retrieve button on the toolbar to see the results.

Last Name	First Name	Sso Login	Connection	Req Login	Department	Status	Req Date
							MM DD YYYY
Imrie	Gordon	gimrie	T-Apriori	rtbest10	Computing & Media	Approval 1	21 2000
Imrie	Gordon	gimrie	P-AdvMgr	ricerro	Computing & Media	Approval 1	22 2000
Imrie	Gordon	gimrie	5.5	ricerro	Computing & Media	Approval 1	21 2000

If you require more detailed information about a particular request, click on that line to highlight it and then click on the Page 1 button on your toolbar. From here, you can proceed to Page 2 to look at the Requester and Approver information.

As an example, here are the steps to run a query of all requests that have been denied-

Click on the Clear button on the toolbar to go back to a blank query.

Tab over to the Department line and either type in the department number you're interested in, or click on the pull-down arrow and choose the department from the alphabetical listing of departments. If you want to look at more than one department you can do so by listing each department on a separate line of the query.

Click on the Status line and click on the pull-down arrow to choose Deny.

Click on the Retrieve button on the toolbar to get your results.

Change the sort of this query to make it easier for you to read.

Request-Inquiry

Use this screen to look at requests made across campus. This screen is helpful if you have questions about correctly completing requests for your users.

The Request Maintenance – Inquiry screen gives you inquiry only access to all requests that have been placed in FirstStep FAST across the University. (As opposed to the Request Maintenance – Requester screen where you can only look at and update requests made for the department(s) you are authorized to process requests for.) This can be useful if you are trying to process a request and you are not sure how to fill out the Request Information box on Page 2 of the Request Maintenance – Requester screen.

The Request Maintenance – Inquiry screen looks just like the Request Maintenance – Requester screen except that the Add and Delete options on the toolbar are inactive.

Proceed as you would if you were looking at a request in the Request Maintenance – Requester screen. Click on the request you want to look at in the Request Activity box, then go to Page 2 to see the Request Information, Requester Comment, and Approver Comment boxes.