

Instructions for Reviewing and Changing Access *V1.2 (1/29/14)*

Welcome to the new Access Review Report! You can now schedule this report to come to you automatically.

- 1) How to Change and Employee's Access that is reflected in the Portal Access Report
- 2) Basic START Instructions
- 3) Need Help? For further information, please contact controllers.office@yale.edu

1. How to change an Employee's Access that is reflected in the Portal Access Report

The START Application (System Technology Access Request Tool) allows designated Training Access Coordinators (TAC) the ability to review, add, change or delete employee access to Oracle Applications and other Yale systems. The majority of ORACLE Access and DWH Access may be obtained, modified or deleted via START. In some cases, other procedures are needed and they are provided below.

When to use START

- Oracle Application Access
- Organizational Access
- Job Category Access
- SciQuest Roles
- ITS Service Access for Pins, Email, Scheduling, and PPP
- START Maintain People Lists

Central Responsibilities – Central responsibilities are normally granted to central operating units such as Accounts Payable, Payroll, etc although they do include roles as View HR, Brio or AP. All additions, changes, or deletions to a Central Responsibility require the TAC to send an e-mail (with the person's name, net id, and the exact name of the responsibilities to be added or removed) to oracle.access@yale.edu.

Data Warehouse and Oracle Responsibilities - To change a Data Warehouse or Oracle Responsibility, the TAC must send an e-mail (with the person's name, net id, and the exact name of the responsibilities to be added or removed) to Client Accounts at oracle.access@yale.edu. For example – a user has YUGL JSA Department Grant Approver (Approver role) but they should have YUGL Phase 2 Staging User (Preparer Role).

Express Shipping: Express Shipping responsibilities are added/changed/deleted in START. See START Instructions in Section 5.

Hiring Manager Responsibility (STARS) - To delete a "Hiring Manager", the TAC must send an e-mail (with the person's name, net id, and the exact name of the responsibilities, domain and YAS values to be removed) to stars@yale.edu.

iExpense Responsibilities - To add or delete iExpense Responsibilities (Internet Expense, Signing Limit 0, Signing Limit 1000, and Signing Limit 10,000) the TAC must go to <http://yalebiz.yale.edu/transactions/expense-management-powered-iexpense> and click on Request/Change under the Training and Documentation heading. Complete the form and send to yems@yale.edu.

ITS Services: The following services will end date automatically [Staff—21 days after last active date, Faculty—60 days after their last active date, and Students—on October 1st and April 1st]:

- Yale Mail—Pantheon
- Central Campus Backup (all except those on Quarrk/Med Services)

Oracle Access (not available for change in START): There is some Oracle Access that cannot be added/changed/deleted in START. This includes MEI General User, View Brio Portal, and View POAP Information to name a few. To change an Oracle Responsibility not available in START, the TAC must send an e-mail (with the person's name, net id, and the exact name of the responsibilities to be added/changed/removed to Client Accounts at oracle.access@yale.edu.

START People Lists (in START): If you need to add or delete a person to/from one of the START Maintain People Lists (Ex: Disbursement Approver, ITS Approver), you can do so directly in START provided you have the correct Oracle Responsibility (*see START Maintain Lists for more information*). The Access Review Report provides you with the actual Lists that a person is on. This information is NOT currently available on the START User Access Report).

Choose Maintain Lists option in START and click on the list you want to update. You may make updates as follows:

- 1) Add a new Organization if the one you are looking for is not on the list;
- 2) Click on the Organization Name to add or delete multiple people to that specific Organization;
- 3) Click on an Individual to add or delete multiple Organizations for that person.

If you are having problems, contact controllers.office@yale.edu

START Maintain Lists (in Oracle): In order to have the ability to add or remove employees from the START People Lists, you must have the correct Oracle Responsibility. This appears as "START Maintain Lists" on your Access Review Report as well as the START User Account Profile (*Note that the START User Account Profile also indicates which lists you have access to in the Value Column*). To make changes, have your TAC send an e-mail (with the person's name, net id, and the exact name of the responsibility and List Values to be changed) to oracle.access@yale.edu. ***Do not confuse this with the START People Lists referenced above as changes to that are performed in START and NOT forwarded to User Access.***

Medical School: For ITS Service Access for Pins, Email, Scheduling, and PPP use START.

For all other ITS Service Access [(i.e. SM (Backup), Remote Access and Requests to Add/Modify or Deletes Active Directory, File Shares, Med Shares etc you must complete the Computing Request Form available at <http://www.yale.edu/its/forms/crf.html> and fax to 203 -785-3606

Travel related Access:

Travel Policy Approvers (Orbitz) to add, modify or delete this access, go to the Maintain People Lists (see instructions above) and choose the Maintain Travel People List.

Travel Arrangers (Orbitz) access is granted to all employees. Access is removed from terminated staff on a **quarterly basis**. If you have a situation in which access is not removed within three months of the employee's termination, please contact the travel office at 203-432-9011.

2. Basic START Instructions

Adding Oracle Access

New and existing employees can be granted access to any one of a number of Oracle applications through START.

From the ORACLE E-Business Suite Navigator Page, click on “**START Access for Others**” and then “Access or Services for Others”.

You will be prompted to enter either the NetID of the person or Full Name *[remember that NetIDs are all CAPITAL Letters]*. Click the “Find” button.

Choose the employee by clicking on the NetID. This will take you to the “Request Selection” screen also known as the **Dashboard**.

Request Selection

To add, change, or delete access to an application, click on the appropriate radio button below and click the Submit button. To review previous requests made for a given application, click on the link in the Request Details column.

Name			Net ID		
Add	Change	Delete	Application Name	Application Description	Request Details
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Oracle Human Resources	Enables users to access HR and Payroll applications. Note: The CHANGE action is for modifying YAS values only.	Request Details
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Oracle Payroll Time Entry	Enables users to access Payroll Time Entry. Note: The CHANGE action is for modifying YAS values only.	No Requests Found
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Oracle Procurement	Enables users to access Purchasing and Payables applications such as Procurement Inquiry, EMS (Expense Management System), Web Invoice Payment, and VIP. Note: The CHANGE action is for modifying YAS values only.	No Requests Found

Click “Add” “Oracle Human Resources” and then the Submit button. Another window will open and you will be redirected to [X-Train](#) to request the needed training.

In START, you may navigate by choosing either “Main Menu” or “Log Out” icons at the top of the screen.

Please print your confirmation page and retain it until the access was successfully changed.

Organization Access

For an employee to be able to use an Oracle application, they must have access to one or more organizations. There are also times when an employee no longer requires access to an organization. The organization can be added or removed from an employee’s Oracle Application responsibilities.

Begin at the Dashboard of the person whose Organizational Access needs to be modified.

Add	Change	Delete	Application Name	Application Description	Request Details
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Oracle Human Resources	Enables users to access HR and Payroll applications. Note: The CHANGE action is for modifying YAS values only.	Request Details

Click “Change” “Oracle Human Resources” and then the submit button. Then click on the “Domain Name” or Application that you wish to update.

Change Oracle Human Resources YAS Values

Instructions: Click on the appropriate button to select the Domain for the YAS values to be changed for the person displayed. Then, click on the submit button

Name Net ID

Legend
 + Add operation pending
 - Delete operation pending

Change Domain Name Responsibilities Values

CASUAL TIME APPROVAL ORG	CASUAL TIME APPROVAL	
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From this screen, you can delete Organizational Access by clicking on the “Delete” button next to the access you wish to remove, or you can add new Organization Access by clicking on the “Add” button.

Change CASUAL TIME APPROVAL ORG Domain Values

Legend
 + Add operation pending
 - Delete operation pending

Responsibilities Affected: CASUAL TIME APPROVAL

Instructions: To delete a value, click on the delete button next to the value you want to remove. To add a new value, select the appropriate value from the drop down list and then click the add button. After all changes have been made, click on the Finish button to complete the changes.

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If adding access, click on the “flashlight” first and find the Organization that you wish to add. You may add an Organization from any level of the hierarchy (Division, Dept, and Org). Click on the Organization Name you wish to add. Now you may click on the “Add” Button. At this point, you can add more Organizations or Click on the ‘Finish” Button to process the request. At this point, you will be prompted to choose your TAC’s Name and then submit your request.

Please print your confirmation page and retain it until the access was successfully changed.


Job Category Access

In order to use some Oracle applications, such as Oracle Human Resources, a person must have access to one or more job categories as well as one or more organizations.

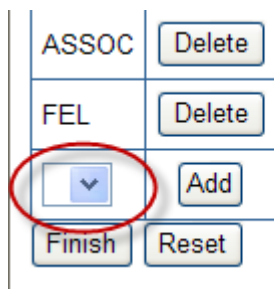
Begin at the Dashboard of the person whose Organizational Access needs to be modified.

Add	Change	Delete	Application Name	Application Description	Request Details
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Oracle Human Resources	Enables users to access HR and Payroll applications. Note: The CHANGE action is for modifying YAS values only.	Request Details

Click “Change” “Oracle Human Resources” and then the submit button. Then click on the “Domain Name” or Access that you wish to update.

Change Domain Name Responsibilities		Values
 CONFIDENTIAL JOBS	View Confidential HR Information restricted by Organization and Job Category -includes salaries	CAS
	YUHR_Phase 2 DEPT Lookups WITH Salaries	STH
	YULD_Department_Grant_Approver	STN
		VF
		ASSOC
		FEL
		CON

From this screen, you can delete Job Category Access by clicking on the “Delete” button next to the access you wish to remove, or you can add new Job Category. To add a new Category, click on the drop down menu and choose the Job Category Access you want to add. Then click the “Add” button.



ASSOC	Delete
FEL	Delete
▼	Add
Finish	Reset

At this point, you can add more Job Categories or Click on the ‘Finish” Button to process the request. You will be prompted to choose your TAC’s Name and then submit your request.

Please print your confirmation page and retain it until the access was successfully changed.

For further information refer to the following:

[Policy 1104: Signature Authority and Delegation, Approval Authority and Access for Financial Transactions](#)

[Procedure 1104 PR.01: Signature Authority, Delegation of Approval Authority and Access for Financial Transactions](#)

[Procedure 1104 PR.01-Appx A: Signature Authority, Delegation of Approval Authority and Access for Financial Transactions – Appendix A](#)

[Procedure 1104 PR.01-Appx B: Signature Authority, Delegation of Approval Authority and Access for Financial Transactions – Appendix B](#)

[Procedure 1104 PR.01-Appx C: Signature Authority, Delegation of Approval Authority and Access for Financial Transactions – Appendix C](#)

Procedure 1104 PR.02 Reviewing User Access, Security and Review Procedures (Available after 7/29)

[Policy 1601: Information Access and Security](#)

[Procedure 1601 PR.01: Access to Oracle Financial and Human Resources Applications](#)

Need Help?

For further information, please contact controllers.office@yale.edu
