User Access and Security

START
Application

“System Technology Access Request Tool”

Department Administration Process

August 2012
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**Important Points**

START does NOT manage all access to all applications.

Call the ITS Help Desk (432-9000) for support when needed.

Critical University policies include but are not limited to the following…

Never let anyone else use you University ID Card.

Never ask anyone for their password and never tell anyone your password.

Never misuse of University information.
Process 1 - Logon

This is the process for logging on in your department.

1. Click Windows “Start” (lower left-hand corner of screen)
2. Click “YAMS” (Yale Administrative Menu System”)
3. Click “HR & Procurement Apps” …
   … (takes you to “Yale Application Links” at bottom of screen – scroll down)
4. Double-Click “HR & Procurement Apps” …
   … (displays “By selecting OK I agree …”)
5. Click “OK” …
   … (takes you to Yale “Central Authentication Service”) (“CAS”)
6. Enter “NNNnnn” (in NetID field)
7. Enter “********” (in Password)
   … (clicking “OK” affixes your electronic signature)
8. Click “OK” …
   … (takes you to “Welcome Page - Main Menu”)
**Process 2 - User Account Profile Report**

The User Account Profile Report is the main “source of record” report. It is most strongly recommended that TAC’s keep an hard copy (paper) application access file on every department staff member. The latest User Account Profile (using the “Show All User Responsibilities” option) should be kept in each staff members access file.

The TAC should always produce a User Account Profile before do any START updates, and then produce another User Account Profile after START updates have been completed. Both the before and after User Account Profiles should be kept in the staff members access file.

From “Welcome Page - Main Menu” …

1. Click “Start Access for Others”
2. Click “Review Access for Others”
3. Select “NetID” (in select match field drop-down window)
4. Check “Match” box (if it is not already checked)
5. Enter “NNNnnn” (NetID in capitals) in select value window …
6. Click “Find” button/link
   … (takes you to “enter selection criteria” window)
7. Click “NNNnnn” (on “NetID” hyper-link) …
8. Click “Show All Current User Responsibilities” (option for only current responsibilities) …
   … All currently active application responsibilities appear
   … All currently active domains appear
   … All currently active domain values appear
9. Click “Show All User Responsibilities” (option for new and old responsibilities)…
   … All application responsibilities appear
   … All domains appear
   … All domain values appear
Process 3 - Add Oracle Application Access

New and existing employees can be granted access to any one of a number of Oracle applications. In this scenario we will grant a person access to the “Oracle Human Resources” application:

1. Click “Access or Services for Others” (under “START Access for Others”)
2. Select “NetID” (in select match field drop-down window)
3. Check “Match” box (if it is not already checked)
4. Enter “NNNnnn” (NetID in capitals) in select value window …
   … (takes you to “enter selection criteria” window)
5. Click “NNNnnn” (on “NetID” hyper-link) …
   … (takes you to “Request Selection” screen – “dashboard”)
6. Click “Add” (“Oracle Human Resources”) (scroll down “Request Selection” screen)
7. Click “Submit” (scrolling down “Request Selection” screen) …
   … (This takes you to “X-Train” screen for requesting training)
8. Click “Main Menu” or “Log Out” (upper-right icons)
Process 4 - Add Organization Access

For an employee to be able to use an Oracle application, for that specific application, they must have access to one or more organizations. In this scenario we will grant a person with access to the “Oracle Human Resource” application access to an additional organization (“FASCHM SBC Chemistry 621201”).

1. Click “Access or Services for Others” (under “START Access for Others”)
2. Select “NetID” (in select match field drop-down window)
3. Check “Match” box (if it is not already checked)
4. Enter “NNNnnn” (NetID in capitals) in select value window …
   … (takes you to “enter selection criteria” window)
5. Click “NNNnnn” (on “NetID” hyper-link) …
   … (takes you to “Request Selection” screen – “dashboard”)
6. Click “Change” (“Oracle Human Resources”) (scroll down “Request Selection” screen)
7. Click “Submit” (bottom of “Request Selection” screen)
8. Click “Change” (top entry “CASUAL TIME APPROVAL ORG” domain)
9. Click “Submit” (bottom of “Change Oracle Human Resources YAS Values” screen)
10. Click “Add” (“Change CASUAL TIME APPROVAL ORG Domain Values” screen)
11. Select “Organization Unit Code” (in select match field drop-down window)
12. Click “Match” box (if it is not already checked)
13. Enter “nnnnnn” (organization code)
   … (ie. enter “621201” in this scenario)
14. Click “FASCHM SBC Chemistry 621201” (organization hyper-link) (“Chemistry”)
15. Click “Add” (“Change CASUAL TIME APPROVAL ORG” Domain Values” screen)
16. Click “Finish” (“Change CASUAL TIME APPROVAL ORG Domain Values” screen)
17. (review “Final YAS Values”) …
   … (on “Complete Change of CASUAL TIME APPROVAL ORG Domain Values” screen)
18. Click “Submit”
19. Print “Request Submission Confirmation” screen (file for reference)
20. Click “Dashboard” (bottom of “Request Submission Confirmation” screen) …
   … (you are returned to “Request Selection” screen)
21. Click “Main Menu” or “Log Out” (icons upper-right)
Process 5 - Remove Organization Access

There are times when an employee no longer requires access to an organization. The organization can be removed from Oracle Application access.

In this scenario we will delete an organization (“FASCHM SBC Chemistry 621201”) from a person’s “Oracle Human Resources” application access:

1. Click “Access or Services for Others” (under “START Access for Others”)
2. Select “NetID” (in select match field drop-down window)
3. Check “Match” box (if it is not already checked)
4. Enter “NNNnnn” (NetID in capitals) in select value window …
   … (takes you to “enter selection criteria” window)
5. Click “NNNnnn” (on “NetID” hyper-link) …
   … (takes you to “Request Selection” screen – “dashboard”)
6. Click “Change” (“Oracle Human Resources”) (scroll down “Request Selection” screen)
7. Click “Submit” (bottom of “Request Selection” screen)
8. Click “Change” (top entry “CASUAL TIME APPROVAL ORG” domain)
9. Click “Submit” (bottom of “Change Oracle Human Resources YAS Values” screen)
10. Click “Delete” (next to Organization to be deleted) “FASCHM SBC Chemistry 621201”
11. Click “Finish” (Change CASUAL TIME APPROVAL ORG Domain Values”)
12. (review “Final YAS Values”) …
    … (on “Complete Change of CASUAL TIME APPROVAL ORG Domain Values” screen)
13. Click “Submit”
14. Print “Request Submission Confirmation” screen (file for reference)
15. Click “Dashboard” (on “Request Submission Confirmation” screen) …
    … (takes you to “Request Selection” screen)
16. Click “Log Out” (icon upper-right)
Process 6 - Add 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.

In this scenario we will grant a person access to the M&P job category for use in the “Oracle Human Resources” application:

1. Click “Access or Services for Others” (under “START Access for Others”)
2. Select “NetID” (in select match field drop-down window)
3. Check “Match” box (if it is not already checked)
4. Enter “NNNnnn” (NetID in capitals) in select value window …
   … (takes you to “enter selection criteria” window)
5. Click “NNNnnn” (on “NetID” hyper-link) …
   … (takes you to “Request Selection” screen – “dashboard”)
6. Click “Change” (“Oracle Human Resources”) (scroll down “Request Selection” screen)
7. Click “Submit” (bottom of “Request Selection” screen) …
   … (takes you to “Change Oracle Human Resources YAS Values” screen)
8. Click “Change” (next to “CONFIDENTIAL JOBS” domain)
9. Click “Submit” (at bottom of screen) …
   … (takes you to “Change CONFIDENTIAL JOBS Domain Values” screen)
10. Click “Add” drop-down menu
11. Select “Confidential Job Code” (in select match field drop-down window)
12. Click “Match” box (if it is not already checked)
13. Enter “MP” (job code)
14. Click “MP Managerial & Professional” (in Job Code hyper-link)
15. Click “Add”
16. Click “Finish” …
   … (takes you to “Request Submission Confirmation” screen)
17. (review “Final YAS Values”) …
   … (on “Complete Change of CASUAL TIME APPROVAL ORG Domain Values” screen)
18. Click “Submit”
19. Print “Request Submission Confirmation” screen (file for reference)
20. Click “Dashboard” (on “Request Submission Confirmation” screen) …
   … (takes you to “Request Selection” screen)
21. Click “Main Menu” or “Log Out” (icon upper-right)
Process 7 - Remove Job Category Access

In this scenario we will delete the M&P job category for a person using the “Oracle Human Resources” application:

1. Click “Access or Services for Others” (under “START Access for Others”)
2. Select “NetID” (in select match field drop-down window)
3. Check “Match” box (if it is not already checked)
4. Enter “NNNnnn” (NetID in capitals) in select value window …
   (takes you to “enter selection criteria” window)
5. Click “NNNnnn” (on “NetID” hyper-link) …
   (takes you to “Request Selection” screen – “dashboard”)
6. Click “Change” (“Oracle Human Resources”) (scroll down “Request Selection” screen)
7. Click “Submit” (bottom of “Request Selection” screen) …
   (takes you to “Change Oracle Human Resources YAS Values” screen)
8. Click “Change” (next to “CONFIDENTIAL JOBS” domain)
9. Click “Submit” (at bottom of screen) …
   (takes you to “Change CONFIDENTIAL JOBS Domain Values” screen)
10. Click “Delete” (next to the job category to be removed) (“MP”)
11. Click “Finish” …
    (takes you to “Complete Change of CONFIDENTIAL JOBS Domain Values” screen)
12. (review “Final YAS Values”) …
    (on “Complete Change of CONFIDENTIAL JOBS Domain Values” screen)
13. Click “Submit”
14. Print “Request Submission Confirmation” screen (file for reference)
15. Click “Dashboard” (on “Request Submission Confirmation” screen) …
    (takes you to “Request Selection” screen)
16. Click “Main Menu” or “Log Out” (icon upper-right)
Process 8 - Change Responsibility Access

Sometimes an employee’s responsibility for a specific Oracle Application needs to be changed.

Access to the application itself, access to organizations and access to job categories might all be as desired, but a specific responsibility needs to be added or deleted. Changing Oracle Responsibilities increase or decrease what a person can do in the specific Oracle Application. Changes in Oracle Responsibilities cannot be done in START. To change an Oracle Responsibility you must send an email request to User Accounts at oracle.access@yale.edu.

1. Send the email to “oracle.access@yale.edu”
2. Print a copy of the email (file for reference)

One “change in Oracle Responsibility” example is if a person is currently authorized to enter journal entries, but is not authorized to approve journal entries. Now this person is to be given the ability to both enter and authorize journal entries. In this case the person’s Oracle Responsibility …

Already is … “YUGL Phase 2 Staging User”

Needs to be … “YUGL Phase 2 Staging Manager”

The employee in this example is John Doe and his NetID is “jhd025”.

To change John Doe’s responsibility send an email in the following format to “oracle.access@yale.edu.

“I request that the Oracle General Accounting responsibility for John Doe (jhd025) be changed so that he can approve journal entries. Please upgrade “YUGL Phase 2 Staging User” to “YUGL Phase 2 Staging Manager” and send me a confirmation when complete.”

3. Send the email to “oracle.access@yale.edu”
4. Print a copy of the email (file for reference)

Doing the above …
- Identifies clearly who you want the access changed for
- Functionally describes what it is that you want done
- Identifies the responsibilities you want added, changed or deleted
- Provides an audit trail of your action
Process 9 – Review Who Has Access to Your Department Data

First: It is the department Business Manager’s responsibility to periodically review who has access to department data and correct all cases of inappropriate access.

Second: It is the department Business Manager’s responsibility to terminate access to data as soon as the staff member is no longer in their department and confirm that the access in question is no longer present.

This is how to review access to your data.

To review access to data in your department run the Access Review Report run at the applicable level (ie. division, department, organization, etc.).

1. Go to YAMS
2. Select “Reporting”
3. Select “Data Warehouse Portal”
4. Sign into Data Warehouse Portal
5. Double-Click “University Standard Reports”
6. Double-Click “Finance”
7. Click “Review Tools”
8. Double-Click FINRT4 Access Review Report program collections file
9. Select the appropriate Organization Level
10. Click “Run”
11. Double-Click the output collections file to view the output
12. For further guidance contact ga.usersupport@yale.edu.
Process 10 - Access when Employee Transfers Out

When an employee transfers to another department within the University, it is the responsibility of the TAC in the department the employee is leaving to immediately update the employee’s access.

Before starting this process communicate with the TAC in the new department and copy the business managers in both the original department and the new department.

When an employee is transferring to another department at Yale it is to be assumed that the employee will be doing similar work in the new department as he (or) she was doing in the old department. Because of this, it is the responsibility of the TAC in the original department (the department the person is transferring from) to delete access to all the organizations in his/her department. But do not delete access to any Oracle applications, any job categories or any Oracle responsibilities.

_Recap:_ Removing the existing Oracle application organization access is the responsibility of the TAC in the original department. The TAC in the original department should not make any additional access changes.

1) Communicate with the responsible TAC in the employees new department
2) Copy the Business Manager in your department and the new department
3) File email communications (retain for audit trail)
4) Remove your original Organization(s) using “Change”
5) Do not remove or delete any applications, job categories or responsibilities
Scenario 11 - Access when Employee Transfers In

When an employee transfers to another department within the University, it is the responsibility of the TAC in the department the employee is transferring into to immediately update the employee’s access.

Before starting this process communicate with the TAC in the original department and copy the business managers in both the original department and the new department.

When an employee has transferred to another department at Yale it is to be assumed that the employee will be doing similar work in the new department as he (or) she was doing in the old department. Because of this, it is the responsibility of the TAC in the new department (the department the person is transferring into) to add access to all the organizations in his/her department and to review all the Oracle applications, job categories and Oracle responsibilities. Remember that adding the new organization(s) will activate all applications, responsibilities and job categories present.

Recap: Adding new Oracle application organization access is the responsibility of the TAC in the new department.

1) Communicate (email) with the responsible TAC in the employees original department
2) Copy the Business Manager in your department and the original department
3) File email communications (retain for audit trail)
4) Add the new Organization(s) desired using “Change”
5) Add or remove access to applications as desired
6) Add or remove access to job categories as desired
7) Add or remove access to responsibilities as desired
Scenario 12 - Access when Employee Terminates Yale

When an employee leaves the University or transfers to another department within the University, it is the responsibility of the TAC in the department the employee is leaving to immediately update the employee’s access.

When an employee is terminating and leaving the University all access must be immediately deleted. Deleting access correctly requires that you update START and send email notification to User Accounts and Oracle Access.

1. Click “Access or Services for Others” (under “START Access for Others”)
2. Select “NetID” (in select match field drop-down window)
3. Check “Match” box (if it is not already checked)
4. Enter “NNNnnn” (NetID in capitals) in select value window …
   … (takes you to “enter selection criteria” window)
5. Click “NNNnnn” (on “NetID” hyper-link) …
   … (takes you to “Request Selection” screen – “dashboard”)
6. Click “Delete” (next to each application – one application at a time)
7. Click “Main Menu” or “Log Out” (upper-right icons)

The employee in this example is John Doe and his NetID is “jhd025” John Doe has a number of Oracle department roles that can be deleted using START. John Doe also has the Oracle central role of “YUAP_Phase 2 AP Processor” which allows him to place and release transactions “on hold”. In addition to the above he also has Fax Server Gateway.

As soon as John Doe leaves Yale do the steps above and send the following emails.

“John Doe (jhd025) is no longer at Yale as of 10/01/03. I have deleted all access in START. I request that his remaining YUAP_Phase 2 AP Processor” central access be removed. I also ask that his Fax Server Gateway be deleted. Please send me a confirmation when this is complete”.

1. Send the email to “user.accounts@yale.edu”
2. Send the email to “oracle.access@yale.edu”
3. Print a copy of all emails (file for reference)

Doing the above …
- Deletes all that you can using START
- Identifies services to be deleted by “oracle.access” (the central Oracle application role)
- Identifies services to be deleted by “user.access” (the Fax Server Gateway)
- Insures that you will receive confirmation that deletion of all access is complete