A, E, I, O, & U.L.

January Unit Liaison Meeting
Ken Heskett-
ITS Access and Accounts Manager
Agenda

• Introduction
• Access Process and the ULs
• Accomplishments of the A&A team
• Security Roles Consultation
• ITS Services Off-Boarding Consultation
• Questions and Answers
ITS Access & Accounts Team

• Consists of one manager (me)
• Four Business Systems Analysts
• Seven Business Processing Office Analysts

*Not pictured: Kyle Raths, Marilyn Clark, and Laurie Bater.
What is the Access Process?

- **Request Access via OARS**
  - Common role finder
  - Role selection tool

- **Request Authorized**
  - Department (if required)
  - Unit Liaison

- **Sent to ITS**
  - Data owner approval
  - Training assigned
  - Access and Compliance form signed

- **Training Completed**
  - Access processed

Flowchart:
- Received by ITS
  - Pending UL approval
  - Pending ITS authorization Waiting for training
  - ITS Processing
On OARS Approval Action

• Approval is key element of UL interaction with the access process.
• Approval is based on Appointing Unit Department IDs
• Without you, no access request can be processed.
• You have control over notifications.
Check your UL Preferences

Online Access Request System (OARS)

Welcome to the Online Access Request System (OARS), where U-M faculty and staff can request access to our administrative data systems.

Use the menus or the search below to get started. For help using this system, please contact Access & Accounts.

New Access Requests

- Create an Access Request
  - Common Role Finder
  - Role Selection Tool
  - Roles Similar To Existing User
  - Request to Edit

- View and Submit Existing
  - Requests for Assigned
  - Roles for Assigned

Search OARS

Search for roles, courses, requests & user security

Search

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Set Unit Liaison Preferences for (kheskett)

Provide your preferences for access requests that are submitted for your authorization by specifying:

- Other authorized signers to be notified of Submitted requests that are pending authorization.
- How frequently the Online Access Request System should send e-mail notifications to you.
- Whether or not you want to be notified if another signer authorizes a request on your behalf.

Notification for Other Authorizers

Use the two options below to identify others to be notified about requests that have been submitted for authorization. (By default, only the primary Unit Liaison is notified of requests pending authorization, which could delay processing if the primary Unit Liaison is out of the office.)

Other system (FN, SA, HR) ULs in my unit:  
- Yes
- No

Alternate Signers:  
- Yes
- No

Notification Frequency and Type

Indicate how often you want to receive e-mail notification about access requests waiting to be authorized. The Notification Frequency option applies to notifications to be sent to the primary UL and to other authorizers specified above.

- Daily: The system sends one e-mail each day, summarizing the new requests pending your authorization.
- On Submit: The system sends an e-mail each time a new request is pending your authorization.

Specify the type of email you will receive. By default, text email is selected. Only select HTML when your email system is set to receive this type.

- HTML: The email sent includes hyperlinks to the OARS home page and to specific access requests.
- Text: Email sent only includes a hyperlink to the OARS home page.

Notification of Authorized Requests

Indicate if you want to receive an e-mail notification if another signer authorizes a request on your behalf.

- Yes
- No

Use the following link to set up optional Department Authorizers, which will add another layer of authorization to the Access Request Process. When Department Authorizers are set up, they must authorize requests before the Unit Liaison or Authorized Signer will be able to authorize.

Set Up Optional Department Authorizers

Save UL Preferences
Training can be Bypassed or Waived

• If there is a business reason, you as a UL can request a bypass or waiver for some training. Exceptions:
  – M-Pathways Financials roles that are permitted to encumber U-M funds (i.e., P-Card, eProcurement Requisitions, non-PO vouchers, etc).
  – eLearning courses must be completed.

• Additional information at: http://www.mais.umich.edu/training/waivers.html
How are we doing?

ITS measures access requests against 2 Service Level Expectation Goals:

1. 70% of requests are processed in 4 hours
2. 90% of requests are processed in 9 hours

AND...
ITS is exceeding these targets

<table>
<thead>
<tr>
<th>Date</th>
<th>ARS requests completed</th>
<th>% ARS requests completion time ≤ 4 business hrs</th>
<th>% ARS requests meeting SET ≤ 9 business hrs</th>
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ITS Service Center is Here to Help!

• If you need assistance with creating a request...
• If you think your access request is unusually delayed...
• If you need an access request fast-tracked...
• If you have a great idea to share with us...

...do not hesitate to call the ITS Service Center (that’s A&A, too!) at 764-HELP.