Tips: OARS & M-Pathways Roles

November UL Meeting

11/14/12
UL: System Access & Security Responsibilities

• Review the M-Reports **Access Validation report** bi-annually.
• Use **Online Access Request System (OARS)**:
  – Complete, approve, & modify requests
  – Remove access (e.g., staff turnover)
  – Ensure staff in your unit have appropriate **training** and software licenses

Two resources can help you fulfill these responsibilities:
  • **Access Validation Report in M-Reports**
  • **OARS web site**

* From ITS UL website: http://www.mais.umich.edu/groups/ul_role.html
Access Validation Report

• Navigation:
  University Business > Reporting > M-Reports
  Compliance tab > Access Validation

  MToken required for M-Reports

<table>
<thead>
<tr>
<th>Access Validation Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dept</td>
</tr>
<tr>
<td>--------------</td>
</tr>
<tr>
<td>Taurus, Tammy</td>
</tr>
<tr>
<td>HE Prod</td>
</tr>
</tbody>
</table>

– Data refreshed nightly
– For assistance, see Access Validation Report Overview
Access Validation Report

What this report shows
Primary ULs for their departments:

• System roles for people appointed to the departments
  – M-Pathways
  – U-M Data Warehouse
  – M-Reports
  – WebNow/ImageNow

• Secondary security associated with the role (limited)

What you can use it for

• Look up an individual’s access (by uniqname)
  – Review roles & secondary security to determine if another user need same type of access
  – Identify the secondary security value(s) for a role in order to complete a request in OARS.

Tip! Select the “Include MISC Subject Area” text box to see Data Warehouse and Imaging info.
Terms

- **Primary Security** – Main role that provides access to the system functionality
- **Secondary Security** – Limiting factor (e.g. Dept ID) that restricts the primary access
- **Hierarchy of roles** – Where multiple roles are required, one role is the key for access and additional (related) roles provide a component of access.
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 Delete

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

Search OARS

Search for roles, courses, requests & user security

[Search]

New in OARS

- Designate an Alternate User in Financials ~ 7/27/2011
- Requesting roles similar to an existing user ~ 5/16/2011
- Receive updates as we process requests ~ 3/13/2011
- Attach a file of Department ID to requesting ICEmployment action ~ 2/28/2011

Help

- Submitting Access Requests
- Using the Common Role Finder
- Using the Role Selection Tool
- Reviewing and Authorizing Access Requests
- Determining the Status of an Access Request
- Access Request process flow

Next Steps: You've been granted access. Now what?
• Use Secondary Security Only to adjust limiting factors for roles (e.g. Career & Program Security)
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.

Search OARS

Search for roles, courses, requests & user security

New Access Requests

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

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

New in OARS

- Designate an Alternate Work User in Financials ~ 7/27/2011
- Requesting roles similar to an existing user ~ 5/16/2011
- Receive updates as we process your request ~ 3/13/2011
- Attach a file of Department IDs when requesting ICEmployment accounts ~ 2/28/2011

Help

- Submitting Access Requests
- Using the Common Role Finder
- Using the Role Selection Tool
- Reviewing and Authorizing Access Requests
- Determining the Status of an Access Request
- Access Request process flow
- Next Steps: You've been granted access. Now what?
## Access Role Descriptions

Getting stale search results? [Try reloading this page.](#)

### Student Administration

Advisement/Degree Progress rules (requirements). This role is only for the Degree Audit Staff in the Registrar's Office.

<table>
<thead>
<tr>
<th>Role</th>
<th>Required Training</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SR ACAD CALENDAR MAINTAINER</strong></td>
<td>AC101</td>
</tr>
<tr>
<td><strong>SR ACAD STANDING MAINTAINER</strong></td>
<td>SRE103, MPE001, SRC102, SRD101</td>
</tr>
<tr>
<td><strong>SR ACADEMIC ADVISOR</strong></td>
<td>AAE101, MPE001</td>
</tr>
</tbody>
</table>

This role provides View access to associated Academic Advisement and limited Student Records pages. This role also provides print access to Degree Audit (Advisement) Report and unofficial transcripts. The audience for this role is Student Academic...
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.

Search OARS

Search for roles, courses, requests & user security

New Access Requests

- Create an Access Request
  - Common Role Finder
  - Role Selection Tool
  - Roles Similar To Existing User
  - Request to Delete
- View and Submit Existing Requests for ibolding
- View Assigned Roles for ibolding

New in OARS

- Designate an Alternate User in Financials ~ 7/27/2011
- Requesting roles similar to an existing user ~ 5/16/2011
- Receive updates as we process your request ~ 3/13/2011
- Attach a file of Department ID Employment and University Job Title ~ 2/28/2011

Help

- Submitting Access Requests
- Using the Common Role Finder
- Using the Role Selection Tool
- Reviewing and Authorizing Access Requests
- Determining the Status of an Access Request
- Access Request process flow

Next Steps: You've been granted access. Now what?
• Check current system access
• Find out what requests are in process
Roles Similar to Existing User

1. Use the **Access Validation report** or Search OARS box to identify
2. Use the **Roles Similar to Existing User** link to initiate request
Submit and Authorize Roles Request for lbelding

Uniname: lbelding  Name Lookup
User Name: Lisa Collins (Regular Employee)
Unit: Its Administrative Info Svcs

Add roles similar to uniname: labarnes
*This does not include restricted roles and includes current access only.

Requestor Information
Requestor: Lisa Collins (Regular Employee) Phone: 734/763-5549
Unit: Its Administrative Info Svcs Dept ID: 481207

Role Information

Add Roles

Roles Being Requested
HR ADL PAY WRKFLOW VIEWER
HR EMP RESUME VIEWER
HR TERM WRKFLOW VIEWER
TL TIME ENTRY APPROVER

Roles Available to Add
AdmissionsAid
AdmissionsTargetSetter
AM DEPARTMENT ASSET SPECIALIST
AM FINANCIAL MANAGER
AM PROPERTY CONTROL MANAGER
AM PROPERTY CONTROL STAFF
AM PROPERTY DISPOSITION EMPL
AM VIEWER
Applicant Administrator
AR BI MANAGER

Optional Secondary Security
Required Secondary Security
Current Roles
Roles Requested

Add "——-

-> Remove
User Leaves Unit

Use the Request to Delete link

Tip!
Remember BO reports need to be moved.
- Copy reports to folder in User-Shared or send the reports to a BusinessObjects inbox
Tips for HR View or Update Access

• When requesting the HR TOTAL APPOINTMENT VIEW USER Role, there is no need to also request the HR APPT VIEWER Role. The HR APPT VIEWER Role is a view version of the HR TOTAL APPOINTMENT VIEW USER Role.
Tips for HR eRecruit Access

• An Individual can only have one eRecruit Role at a time. These Roles start with “HR EMP”. If adding a new eRecruit Role, be sure remove any eRecruit Roles previously granted.
Tips for HR Term Workflow Access

- There are 3 Roles that provide page access to Termination Workflow.
  - HR TERM WRKFLOW UPDATER - Provides ability to create termination transactions.
  - HR TERM WRKFLOW APPROVER - Provides ability to approve termination transactions.
  - HR TERM WRKFLOW VIEWER - Provides ability to view termination transactions.
Tips for HR Term Workflow Access (cont.)

• There are 2 ImageNow Access Levels:
  – Level 1: Ability to put termination documents into ImageNow AND view them.
    • ImageNow Groups: HR View Appointment and HR View WA I9 Temp Employment
    • Level 1 access provided automatically to staff with HR EMP UNIT USER Role.
    • Individual M1 requests for these Level 1 ImageNow Groups require special approval.
Tips for HR Term Workflow Access (cont.)

– Level 2: Ability to put termination documents into ImageNow, but not view them.

  • ImageNow Groups: HR Add Only Appointment AND HR Add Only Temp Employment
  • Level 2 security access can be given out to staff with access to the HR TERM WRKFLOW UPDATER or HR TERM WRKFLOW APPROVER Roles, as long as it fits with their business process. Check with your Unit HR Officer to determine your department’s business process.
Tips for Student Admin Secondary Security

• Valid values for some of the Secondary security types can be found on the ITS Public Site.

http://www.mais.umich.edu/student/savvalidvalues.html
Tips for Student Admin MReports Access

• When requesting MReports AdmissionsAid or AdmissionsTargetSetter, be sure to include secondary security on the M1 form:
  — Career/All Programs
  OR
  — Career/Specific Programs
  OR
  — Academic Group
Tips for Student Admin Events Access

- When requesting the SR EVENT UPDATE USER and/or the SR EVENT UPLOAD USER roles, the required academic org and department event org codes are typically the same number.
Tips for Financials

• The PR EPRO USER role includes Marketsite access (request the PR EPRO MARKETSITE role for just Marketsite access)

• Reminder for Department Managers to use the online Approval Profile page for designating an alternate workflow approver
Tips for MReports Internal Controls

• The ICEmployment role includes *all* internal control reports; no need to request ICOtherTools with this role
• Departmental Security Settings (DSS) is required for IC roles
• An Excel list of deptids can be attached to the request if helpful
• Use the ‘Submit Batch Load’ option for 10 or more employees
Tips for IC Criteria Bar Use

• Requires selecting options in order from Campus -> VP Area -> School/College -> Dept

• Multiple criteria can be saved for future re-use

• Visit the [IC Management Reports](#) site for helpful information
Most Important

• Keep ITS in the loop of any UL changes as soon as possible.
• An employee's department is based on what it is on their staff/HR record.
• If training is required, access will not be granted until complete.
Questions?

- Submit a Service Request Online (login required)
- 4HELP@umich.edu
- 734-764-HELP (764-4357)