WEBER STATE UNIVERSITY

Security Access

Guide for Viewing, Modifying, Requesting, or Removing Security Access
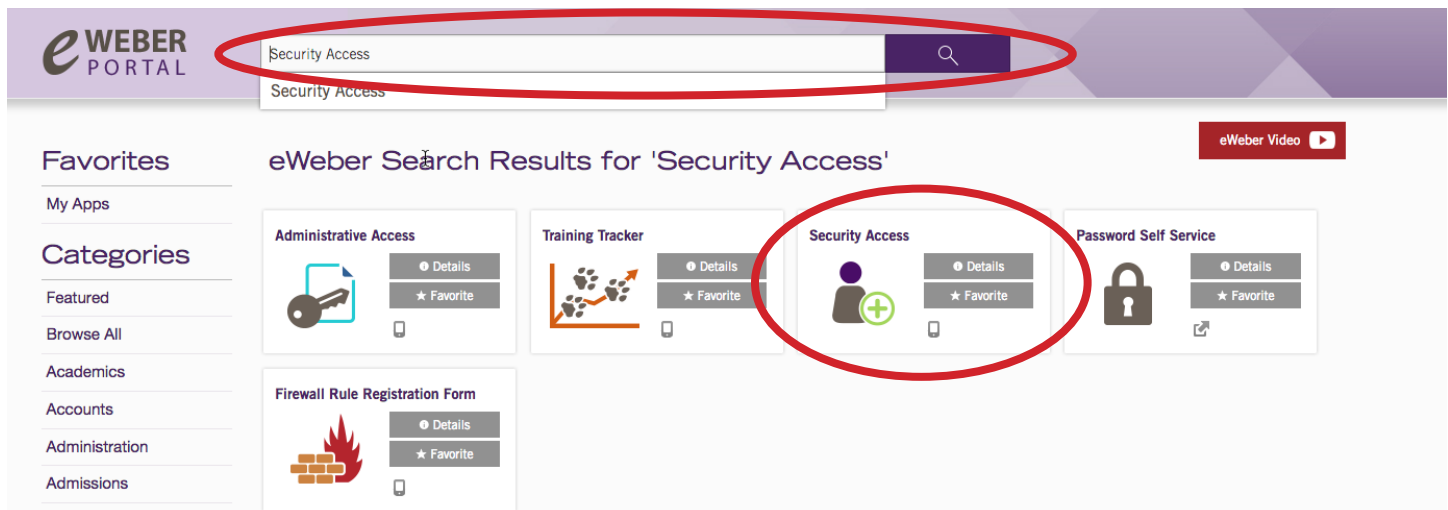
How to Log in:

1. Log into your eWeber Portal

2. In the Search box, type **Security Access**

3. Click on the Security Access System Application Icon

You can add the Security Access System application to your favorites list, by clicking on **Favorite** to the right of the application. This can help make it easier to find it again in the future.

Not seeing what you are looking for?

If the **Security Access System** application does not appear on your eWeber Portal after searching for it, please call ext. 7777.

Why does Security Access matter?

First, it grants you access to secured functions you will need in order to do your job. Second, if you have functions you do not need in your position, and your workgroup is audited, you may be required to address improper security access.

Getting Started

In Security Access, you can view the access that is currently assigned to your position or the positions of your direct reports, request additional access, and request that unnecessary access be removed. Please be aware that supervisors are responsible for the security access of their employees.

Start by looking at what security access you have in the **View Only** screen.

1. Click the drop down menu that says **Select Function**.

2. Click **View Only**.

This will take you to the **Position Lookup** page.

If you don't know the position number, click on **Name Search**.

If you happen to know either your position number or the position number of the employee you are looking for, enter the number and click Lookup. Note: If it is an hourly position, you must know the **Orgn Code.**
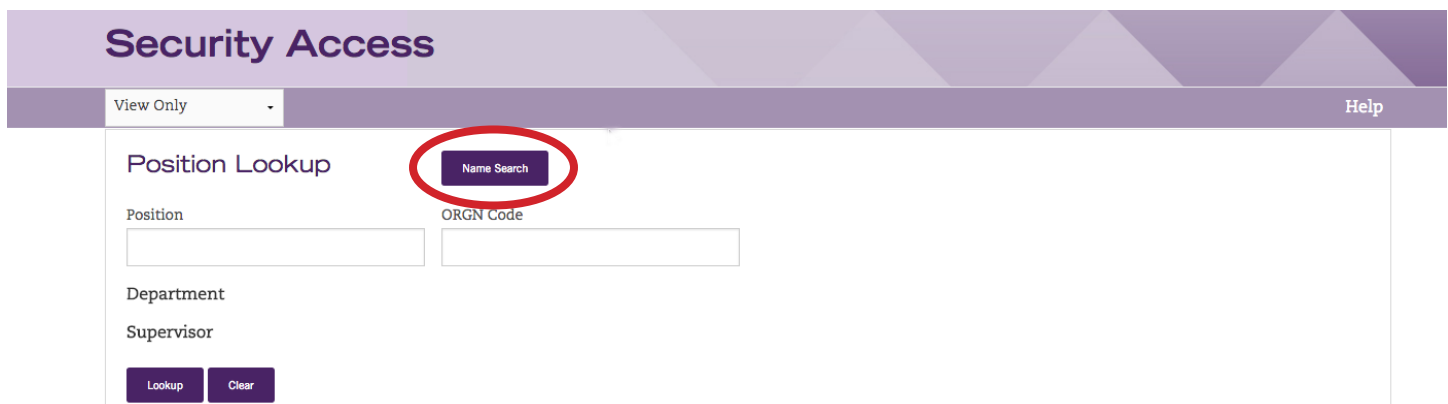
You should now see a **Name Lookup** section.

1. Enter your last name or the last name of the employee and click **Lookup**.

2. Find your name or the name of your employee on the list, and click on **Select** to the left of the name.

You should now see a **Position Lookup** box with your name or your employees naem,, position number, and Orgn Code filled in, along with **Person Information** on the right of the screen. Click **Select** to go to the next screen.

The functions available are: **ARGOS, Banner, Finance, Payroll, SIAINST, WebTailor, and Developer**.

Here is a quick rundown of each of these functions. These will make more sense later, so for now just look them over to get a basic understanding.

ARGOS - This is a reports system formerly known as Crystal Reports. If you see ARGOS or Crystal access, you know you will have access to see some kind of report.

Banner - Many employees will need security access in Banner, so pay close attention to this function and any access granted by Banner. When 'Requesting Security', you will need to request either 'modify' or 'query' access depending on whether you need to 'make changes' or just 'view information' respectively.

Finance - If you handle finances for Weber State University, you will likely need security access through this function. Requires either 'modify' or 'query' access---same as Banner.

Payroll - If you are employed in HR or Payroll, you will need access to security in Human Resources.

SIAINST - If you are in an advisor, you will need access to SIAINST. If you do need it, request either 'modify' or 'query' access---same as Banner. Department secretaries will assign access to SIAINST for faculty.

WebTailor - WebTailor is the area of Self Service where certain people at WSU can assign users to Self Service, or have the rights to "tailor" the way Self Service works.

Developer - This is access that is limited to Data Warehouse developers.

Now that you have a basic understanding of the functions, click on each of the functions to see what access is currently assigned to the position. The best practice is to go through each function so you can find out what functions need to be removed or added.

It is good to notice that the **Requested Security** section will show up under every function you select. Under **Desc** you can see all the details of the request for a specific **Function**. In the example below, the function is Finance. You will also be able to see if the request has been approved by the Supervisor and the Data Steward. Note: Supervisory approval is a crucial step, as you will see in the Request Security section.

The following screenshots of each function will help you know you're on the right track.

Banner View Only screen.

Requested Security   by SYSTEM on 11/21/2011

Function Access:

System	Desc	Comment	Super Apprv	Steward Apprv	By	Date
Accounts Receivable	Only for Staff working directly with student financial accounts including Tuition/Fee assessment and payment	test				
DBA	Access to Argos Provisioning folder		Y	Y	W0	03/15/2013

Available Access Banner Classes

Close

	Banner Class Code	Sys Code	Description	Employee Has
View	BAN_FINANCE_SELF_SERVE	F	Finance	Y
View	BAN_GEN_USR	G	General	Y
View	BAN_AAA_TECH	H	Human Resources	Y
View	BAN_HR_ALL	H	Human Resources	Y

Now look at Existing Banner Class Security in the example above, it shows there is existing Banner access for the position, and as you can see on the far right column, under **Employee Has**, the employee has access to all functions. Go through each function to get an idea of what functions you have and do not have. Follow the **Request Security** section to learn how to add or remove functions as needed.

Need help? Please call HR at ext. 6032.

ARGOS View Only screen.

Requested Security
by SYSTEM on 11/21/2011

Function Access:

System	Desc	Comment	Super Apprv	Steward Apprv	By	Date
Accounts Receivable	Only for Staff working directly with student financial accounts including Tuition/Fee assessment and payment	test				
DBA	Access to Argos Provisioning folder		Y	Y	W0	03/15/2013

Available Access ARGOS

[Close]

ID	Name	Desc	Has Access?
3	crystal_adc	ADC	Y
9217	crystal_audit_managers	Audit Managers	Y
32	crystal_finance_month_end	Folders = Finance - Month End and Campus Access	Y
41	crystal_hr_general	Folders = Human Resources Campus Access	Y
40	crystal_hr	Folders = Human Resources, Human Resources Campus Access	Y
89	crystal_telecom_dept_acc	Telecom Dept ACC	Y

Finance View Only screen.

Available Access Finance

[Close]

Master Fund: Query

Master Organization: Query

Invoice Restrictions: No Invoices

Invoice Overage Tolerance:

Invoice Tolerance Amount:

☐ Invoice Tolerance Override

☐ Invoice Receipt Required Override

☐ NSF Override
☐ Expenditure End Date Posting
☐ Post in Accrual Period
☐ EDI Override
☐ ACH Override
☐ Purchase Card Override
☑ Self Service Access
☐ Payroll Expense Detail Access
☐ Payment Hold Override
☐ Purchase Order Hold Override

☐ Requisition Receipt Required Override
☐ Purchase Order Receipt Required Override

☐ Self Service Budget Access

Budget Master Fund:
No Authority

Budget Master Orgn:
No Authority

Finance View Only screen continued...

Receiving Qty Overage Tolerance:

Receiving Qty Tolerance:

☐ Receiving Override

Receiving Amt Overage Tolerance:

Receiving Amt Tolerance:

ORGN Access

Orgn Code	Access	Self Service Budget Access
3500	B	N
3500	B	N

ORGN Code

Access

Both

Self-Service

Query/Posting

Payroll View Only screen.

Available Access Payroll

Close

Maximum Salary Level:		☐ Benefit Administrator	**Salary Planner Master Orgn:**	None ▾
☐ Master Employer	☐ Time Entry Approvals Superuser	**Faculty Compensation Master Orgn:**	None ▾
☐ Master Organization	☐ Leave Report Approvals Superuser	
☐ Master Employee Class	☐ Effort Certification Superuser	
	☐ Labor Redistribution Superuser	

ORGN Access

Module

Faculty Compensation

ORGN Code

Access

Update

SIAINST View Only screen.

Available Access SIAINST

Close

Category

Select a Category...
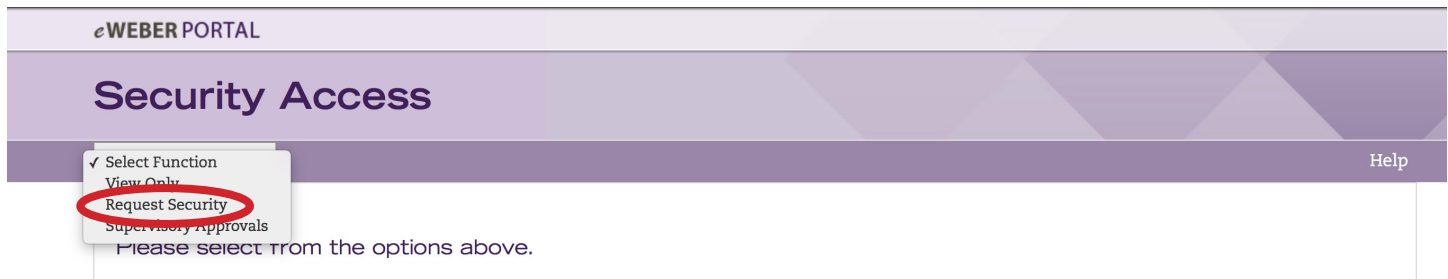
Staff Type

Select a Staff Type...

☐ Faculty

☐ Advisor

WebTailor View Only screen.

Available Access WebTailor

Close

ID	Desc	Has Access?
IDB BILLING	InterDepartment Billing	Y

Shown above is the Security Access System home screen. Again, you can get to any Security Access screen from the drop down box at the top of the page.

1. Click the drop down menu that says **Select Function**, it may say **View Only** if you are currently on that screen.

2. Click **Request Security**.

The following instructions will guide you through requesting or removing access.

Please follow the instructions carefully to avoid problems.

If you do this wrong, it can cause major delays in getting the access you need.

Your position number should already be entered in at this point, but if it isn't, follow the same steps in **View Only** to find your name by clicking on **Find a Different Person**. Or if you know your position number, type it in and click **Find Position**.

The next page and a half shows you all the options you have for **Requested Security**.

Requested Security

Check all boxes needed for this request and then click on Submit at bottom of page

	System	Desc	Comment	Super Apprv	Steward Apprv	By	Date
☐	Accounts Receivable	Only for Staff working directly with student financial accounts including Tuition/Fee assessment and payment					
☐	Accounts Receivable	Limited access to Student AR functions. View only access for employees who need to view detailed Student Financial accounts					
☐	Accounts Receivable	Cashiering and related functions.					
☐	Alumni	Requesting contact report update access in Self Service to support Alumni Relations or Development.					
☐	Alumni	Requesting access to Banner reporting tools, specific to supporting Alumni Relations or Development.					
☐	Alumni	Requesting view only Self Service access to alumni, donors, friends, and organizations or businesses attached to Alumni Relations or Development. Access granted to support Alumni Relations or Development.					
☐	Alumni	Requesting data entry INB Banner access. Available to Alumni Relations or Development Office Staff Only.					
☐	DBA	DO NOT REQUEST IMAGING/XTENDER ACCESS THROUGH ONLINE PROVISIONING. Please call or email Mark Read for access.					
☐	DBA	Employees needing access to the Telecommunications reporting folder.					
☐	Finance	Employees needing access to input requisitions or query budget/financial information should request this access.					
☐	Finance	Employees working in Accounting Services, Budget or Purchasing should request this access.					
☐	Financial Aid	Fin Aid Scholarship Enrollment Service Employee View Only					
☐	Financial Aid	Fin Aid Scholarship Hourly Students					
☐	Financial Aid	Fin Aid Scholarship Adviser					
☐	Financial Aid	Fin Aid Scholarship Classified Employees					
☐	Financial Aid	Fin Aid Scholarship Assist Director					
☐	Financial Aid	Fin Aid Scholarship Director and Assoc. Director					
☐	Financial Aid	Fin Aid Senior Adviser					
☐	Human Resources	If you are a TAS (Time and Attendance System) timekeeper, a Leave Tracker time keeper, or a Time Worked (FLSA) approver, DO NOT make your request through provisioning. Please visit the Payroll website to download the request forms. http://www.weber.edu/financialservices/Forms.htmlPayroll Forms					
☐	Human Resources	Employees needing access to FLAC (Faculty Load and Compensation) should request this access					
☐	Human Resources	Only employees working in the Payroll or Human Resources Offices should request this access. Requests for employees in other departments will be rejected.					
☐	Student Admissions	Admissions Continuing Education - Limited modify access to admissions screens used to admit students into the university. Primarily used for Continuing Education partners who admit students to CE programs and workshops.					
☐	Student Admissions	Admissions Ambassador - Limited modify access to admissions screens used to admit students into the university without including transfer articulation privileges. Primarily used for Admissions Ambassadors.					
☐	Student Admissions	Admissions Supervisor - Modify access to all admissions related functions in Banner.					
☐	Student Admissions	Admissions General - Read access to most admissions screens and limited modify privileges. Primarily used for campus partners who need general access to admissions screens.					
☐	Student Admissions	Admissions Advisor - Read access and limited modify access to all admissions related functions in Banner.					
☐	Student Admissions	Admissions Enrollment Specialist - Modify access to most admissions related functions in Banner.					
☐	Student Admissions	Admissions Student Support - Limited modify access to admissions screens used to admit students into the university and articulate transfer coursework. Primarily used for Admissions student workers.					

11

☐	Student Registration	Dean of Students					
☐	Student Registration	Enrollment Services Systems Analyst					
☐	Student Registration	Bachelor of Integrated Studies					
☐	Student Registration	General student worker access					
☐	Student Registration	Athletic Eligibility					
☐	Student Registration	Registrar secretary					
☐	Student Registration	Transfer articulation					
☐	Student Registration	Department secretary access					
☐	Student Registration	Registrar's Solution Center student worker					
☐	Student Registration	Institutional Research					
☐	Student Registration	Registrar's Office - Access for Registrar's Office staff only					
☐	Student Registration	Police Department BANNER access					
☐	Student Registration	Veterans Affairs					
☐	Student Registration	Class scheduling					
☐	Student Registration	Davis Campus Enrollment Services access					

Enter all Finance organization codes needed:

Orgn Codes:

Enter all Faculty Load and Compensation organization codes needed:

Orgn Codes:

The process from here is straight forward, but must be done in a specific sequence to avoid problems. Some judgment will be required to interpret the **Desc** column.

1. Look under the **Systems** column and find the area that you need access to.

2. Find the description that most closely matches the Security Access you need. If you don't find an exact match, don't worry, choose the closest match you can and you will have a chance to provide specific details in a comment box.

3. Once you have found the area you need, click the box to the left to select it.

Once a box has been checked, you will be taken to a screen that says **You are Requesting: _____.** A comment is required. The comment should include detailed and specific information about the request for the Data Stewards.

- Job role (e.g. administrative specialist, trainer, supervisor, etc.).

- Detailed description of job function(s).

- Type of access (e.g. view, query, or modify).

Example comment: *Admin Specialist - need budget access, both query and modify, and month end report.*

Your are requesting: Accounts Receivable
Limited access to Student AR functions. View only access for employees who need to view detailed Student Financial accounts

Enter a comment:

Add   Cancel

2. Click **Add** to submit the comment.

⚠ Please read carefully ⚠

Important: **This will return you to the Requested Security list where you can request additional access. You must follow step 3 in order to complete the request! You can request access for multiple areas in one request; each selected area will have a check mark in the box.**

3. Once you have selected the appropriate areas of requested security and entered a comment for each, you must now scroll to the bottom of the screen to **Submit Request for Approval.**

Please note: Once you have submitted a request for approval, you cannot make changes in the system you selected until after a supervisor has approved or disapproved the request.

System	Desc	Approved	By	Date	Super
Finance	Crystal Reports Argos Reports Lynx Self-Service Finance INB Finance Xtender		W000	08/28/2012	Y

Submit Request for Approval

Removing security access requires you to do the same exact steps as when adding security access. The only difference is what you put into the comment box.

Click the area you need to remove security access from, and the comment box will appear to show **You are Requesting: _____.** along with the area you picked from the list.

1. Your comment could include the following information:

    *   Type of access needed to remove (e.g. view, query, or modify).

    *   Specific banner form.

    *   Specific ARGOS report.

Example comment: *Please remove budget access and month end report - just remove the ability to modify. Please keep the access to query available.*

2. Click **Add** to submit the comment.

⚠ Please read carefully ⚠

Important: **This will return you to the Requested Security list where you can request the removal of additional access.** You must follow step 3 in order to complete the request! **You can request the removal of access for multiple areas in one request; each selected area will have a check mark in the box.**

3. Once you have selected the appropriate areas of requested security and entered a comment for each, you must now scroll to the bottom of the screen to **Submit Request for Approval.**

Please note: Once you have submitted a request for approval, you cannot make changes in the system you selected until after a supervisor has approved or disapproved the request.

System	Desc	Approved	By	Date	Super
Finance	Crystal Reports Argos Reports Lynx Self-Service Finance INB Finance Xtender		W000	08/28/2012	Y

Submit Request for Approval

Supervisory Approvals

Use the drop down menu to select **Supervisory Approvals**.

To review requests for security access, simply click Select to the left of each request listed under pending approvals. (Follow next steps on page 18)

Security Access is assigned to a position number. Salaried employees are given access when they initially meet with an HR representative for benefits enrollment. Any access requested for the position in Security Access after that date will be available to the employee once it is approved by the supervisor and the appropriate data steward/s.

All hourly positions (S00001 and H00001) are pooled positions and access is assigned based on the organization code. Individuals in pooled positions are not assigned unique position numbers, therefore, all employees in a pooled position with the same Orgn code will have identical access. It is not possible to assign different access to two people in the same pooled position.

It is possible to provision or deprovision some employees in a pooled position and not others. Read the instructions on the next page to see how it works.

1. Click on Select next to the hourly (H00001) or student hourly (S00001) position.

2. Click on the **View Employees** button to see a list of all the employees assigned to that pooled position.

A **Y** to the right of their name indicates that they have been granted system access. An **N** indicates that they have no access. To provision or deprovision a particular employee, click on Provision or Deprovision on the far right.

Once you have reviewed the request and made changes to either provision or deprovision the existing employees' position, click **Save for Later**, **Approve**, or **Reject** to finish making a supervisory approval.

Requested Security

Function Access:

System	Desc	Approved	By	Date
Financial Aid	Fin Aid Scholarship Classified Employees			

Other Access Requested:

System	Desc	Approved	By	Date
Student Registration	Duplicated from Position: S00001, Orgn: 20231.	Y		05/16/2014

Save for Later   Approve   Reject

Note: This last step is the same for both Hourly and Salaried employees.

If you need help, please call HR at ext. 6032