INFORMER USER COLLEAGUE DATA PERMISSION REQUEST – PROCEDURES

PURPOSE
These procedures outline the approval/denial Informer permission request process.

Created by: Marie Bey
Campbell University
IT Services
July 30, 2019
# Informer User Colleague Data Permission Request – Procedures

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A. Workflow for the Informer User Colleague Data Permission Request Form

Link to Informer User Colleague Data Permission Request: Informer User Colleague Data Permission Request Form

- **End User Submission**
  - IT Services Review
  - Department Approval/Denial
    - Approved
      - IT Services sends approval submission with comments to the requestor.
    - Denied
      - Denial submission from the Department goes to the User.
  - Department sends the request to IT Services with instructions.
B. End User Submission - Informer User Colleague Data Permission Request Form

Link to Informer User Colleague Data Permission Request: Informer User Colleague Data Permission Request Form

1. Requestor fills out the Informer User Colleague Data Permission Request and Submit

### Informer User Colleague Data Permission Request

**Requestor Information**

<table>
<thead>
<tr>
<th>Date Requested*</th>
<th>07/28/2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee ID*</td>
<td></td>
</tr>
<tr>
<td>Last Name*</td>
<td></td>
</tr>
</tbody>
</table>

**Campbell Email**

<p>| | |</p>
<table>
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**Office Phone Number**

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</table>

**REQUIRED IF YOU HAD PREVIOUS ACCESS: REPORTS OR DATA. LIST THE REPORTS AND OR COLUMNS IN A REPORT THAT YOU NOW DO NOT HAVE ACCESS BUT STILL NEED ACCESS.**

- am an Infromer User and had access to all reports. Grad Assistant.

**REQUIRED IF YOU ARE NOT AN INFORMER USER AND NEED DATA. YOU CAN ONLY REQUEST DATA FOR ONE AREA PER FORM (i.e., student, HR, FA, AR, etc.) Please list the data you need in the box below and be specific. Examples: Term (fall, spring, etc.), Status (admit, enrolled, etc.), Population (student, employee, faculty, applicants, applications, etc.) Also, list the columns you would like in your report (example: student ID, last name, first name, GPA, etc.)**

*Submit*
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**Requestor Information:** Fill in Employee ID, associated data will automatically populate. Enter your Office Phone Number.

(*) denotes a required field below

**NOTE: One of the two boxes below must be filled out in order to submit this form**

**First Box:** For Current Informer Users, who have lost access to mappings or fields in your report, can no longer see one of your reports, or need access to restricted data.
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- **Second Box**: Non-Informer Users who are requesting Colleague data in a report *(New report creations requires a three (3) week notice.)*

<table>
<thead>
<tr>
<th>REQUIRED IF YOU ARE NOT AN INFORMER USER AND NEED DATA. YOU CAN ONLY REQUEST DATA FOR ONE AREA PER FORM (i.e., student, HR, FA, AR, etc.) Please list the data you need in the box below and be specific. Examples: Term (which term(s), Statuses (admit, enrolled, etc.), Population (student, employees, faculty, applicants, applications, etc.) Also, list the columns you would like in your report (example student ID, last name, first name, GPA, etc.)</th>
</tr>
</thead>
</table>

2. Click ‘Submit’:
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3. Notification E-mail: Requestor will receive a notification with the requested information and that IT Services will forward your request to the appropriate department based on the data asked for.

Anna Bly,

Your Informer User Colleague Data Permissions Request submitted on 7/29/2019 has been received and is being processed by the Information Technology Services Administrative Application Team.

Request Details
Prior Access Comment Block:
I am an informer user and had access to HR reports, Grad Assistants.

New Access Comment Block:

We will be contacting the department head who is the owner of the data for the area indicated in your request.

Please allow time for the additional approval and processing time.

You will receive an email confirming the status of your request, once processed.

Information Technology Services Administrative Application Team
C. IT Services Review and Submission to Departments for Approvals

1. IT Services receives the first e-mail notification after a user has submitted their request.
   a. IT Services clicks on the link in the e-mail.

   Information Technology Services Administrative Application Team,

   An User Colleague Data Permissions Request submitted on 7/29/2019 is ready for review by the Information Technology Services Administrative Application Team.

   Employee: BEY, ANNA MARIE (0768066)

   Request Details
   
   Prior Access Comment Block:
   I am an informer user and had access to HR reports, Grad Assistants.

   New Access Comment Block:

   Click link to view request in workflow for processing:

   https://onbaseweb.campbell.edu/appnet/Workflow/WFLogin.aspx?LifecycleId=139&QueueId=348&DocId=6304738
This is what the request looks like in OnBase. IT Services can see the original request (un-editable for audit purposes).
b. IT Services will scroll down to the bottom section of the form (named: ‘Information Technology Services Application Team Initial Review’)

![Image](https://via.placeholder.com/150)

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<table>
<thead>
<tr>
<th>Information Technology Services Application Team Initial Review</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Signature ITS Application Team</strong></td>
</tr>
<tr>
<td>Marie Sey</td>
</tr>
</tbody>
</table>

Data Type/Area Being Requested:
- Admissions - Applications and Applicants Data
- Registrar - Student Data includes all course data i.e. grades, sections, etc.
- A/R - AR - student accounts, billing
- Accounting - Purchasing, AP, general ledger
- Payroll - Employee earnings, taxes, etc.
- HR - employment data and benefits
- TA - Financial Aid Data

Additional Comments/Clarification from Information Technology Services Application Team:
This person has requested HR mappings

Submit ITS Initial Review

IT Services will fill out this section as seen above. When IT Services submits the form for Departmental Processing, it will be directed to the selected department’s approvers. A requestor can only fill out one form per data type/area.

c. IT Services will fill out this section as seen above. When IT Services submits the form for Departmental Processing, it will be directed to the selected department’s approvers. A requestor can only fill out one form per data type/area.

d. IT Services must scroll back to the top of the form to find and click on the ‘ITS REVIEWED’ button for official submission. The form is NOT submitted until this button has been clicked.

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e. An e-mail notification goes to IT Services and the Departmental contact in charge of approvals.

f. Click on the link in the e-mail to bring up the form in OnBase.
D. Departmental Approvals

1. The department opens the link from the e-mail shown on page 10 above.
   a. Scroll to the bottom of the request.
   b. Department Head will ‘E-Sign’ and enter the ‘Processed Date’ as seen below.
   c. In the ‘Informer(Infr) Data Dept Status’ section, the department will then either approve or deny the request.
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2. **If the request is approved**, the appropriate option for approval must be selected below:
   1. The department can either give full access to the entire mapping; **OR**
      The department authorizes partial access (to certain fields) and IT Services will create the report for the user based on the department’s instructions.

   ![InfrData Dept Status]

   - SUBMITTED TO DEPT
   - APPROVED – FULL MAPPING
   - APPROVED – REPORT BY IT
   - DENIED

2. Click on ‘Submit Department Review’
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3. Click on ‘DEPT REVIEWED’ (the form is not fully submitted until the ‘DEPT REVIEWED’ has been clicked)

4. Once the ‘DEPT REVIEWED’ button is clicked, the screen will become empty.
5. E-mail notification to IT Services for final submission to the User.

Information Technology Services Administrative Application Team,

The User Colleague Data Permissions Request submitted on 7/29/2019.1 for BEY, ANNA MARIE (0768966) was APPROVED by TRENT ELMORE on 7/29/2019 and is ready for your final processing.

It was specifically approved with the following approval status: APPROVED - FULL MAPPING

Request Details

Prior Access Comment Block:

I am an informer user and had access to HR reports, Grad Assistants.

New Access Comment Block:

Click link to view request in workflow for final processing:

https://onbaseweb.campbell.edu/appnet/Workflow/Workflow.aspx?LifeCycleId=135&QueueId=3427&DoeId=6304738

TRENT ELMORE

Department Head/Data Owner
E. Information Technology Services Application Team FINAL Processing:

1. IT Services will scroll to the bottom of the form and finish the final processing.
2. IT Services performs any actions approved by the departments.
3. IT Services may enter clarifying comments for the user and clicks on the ‘ITS Final Processing’ button. The form is NOT submitted until the ‘Completed’ button has been clicked.

4. Once the ‘DEPT REVIEWED’ button is clicked, the screen will become empty as seen below.
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5. An e-mail notification goes out to the user with final notes.

ANNA BEY,

Your Informer User Colleague Data Permissions Request submitted on was processed on 7/29/2019.

Request Details

Prior Access Comment Block:
I am an informer user and had access to HR reports: Grad Assistants.

Now Access Comment Block:

Your request was APPROVED by TRENT ELMORE

You were specifically approved with the following approval status: APPROVED - FULL MAPPING

Final processing of your request was completed by Marie Boy on 07/29/2019
with the following additional comments/details:

Access to the HR mapping has been completed.

Marie Boy
Information Technology Services Application Team
F. Departmental Denials

If the request is denied, the Denied Reason (which WILL be seen by the user) is REQUIRED and submitted to the user.

1. E-Sign, enter the Processed Date, and choose Denied as the Status.

2. Click on ‘Submit Department Review’
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3. Click on ‘DEPT REVIEWED’ (the form is not fully submitted until the ‘DEPT REVIEWED’ has been clicked)

4. An e-mail will be sent to the user, as seen below.

No more action is required for denials.