



## **Informer User Colleague Data Permission Request – Procedures**

### **PURPOSE**

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

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IT Services  
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# Informer User Colleague Data Permission Request – Procedures

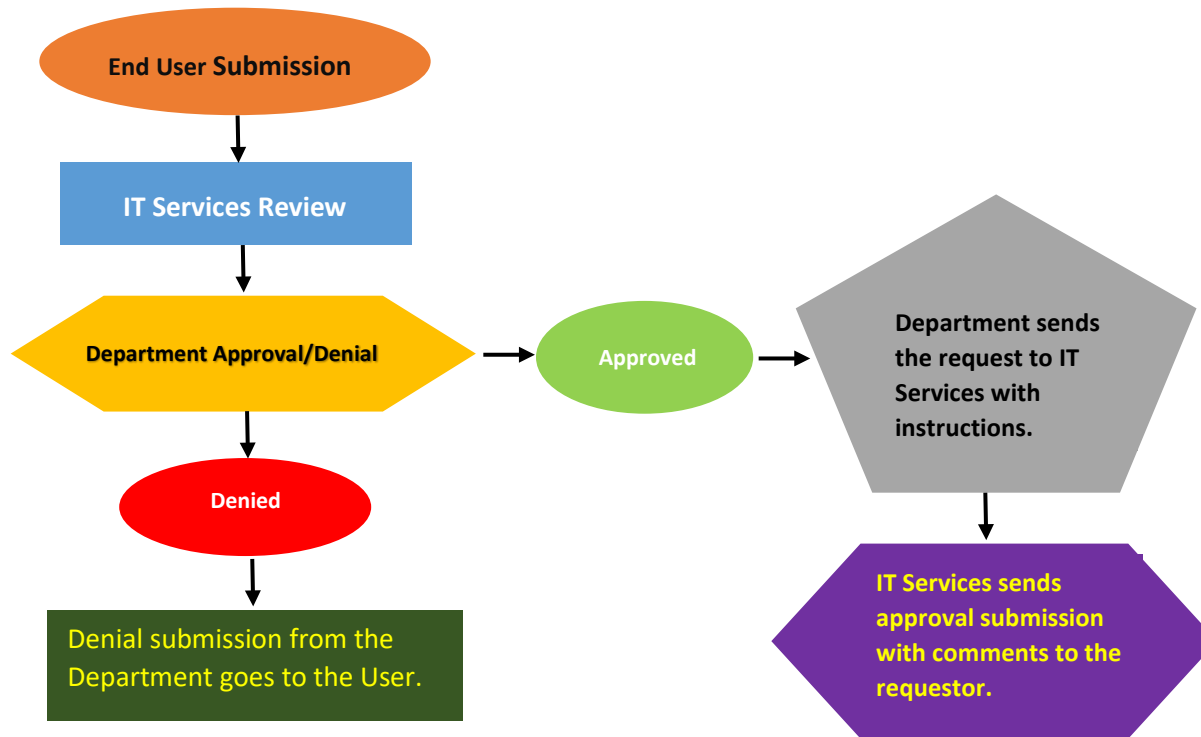
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# Informer User Colleague Data Permission Request – Procedures

## 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](#)



# Informer User Colleague Data Permission Request – Procedures

## 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**

<b>Date Requested *</b> 07/29/2019	<b>Employee ID *</b> 0768966	<b>Campbell Email *</b> BEY@CAMPBELL.EDU	<b>Office Phone Number *</b> (910)-890-0641
<b>Last Name *</b> BEY	<b>First Name *</b> ANNA	<b>Middle Name</b> MARIE	

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

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

**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)), Statures (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)

Requestor Information		
Date Requested *		
07/29/2019		
Employee ID *	Campbell Email *	Office Phone Number *
0768966	BEY@CAMPBELL.EDU	(910)-890-0641
Last Name *	First Name *	Middle Name
BEY	ANNA	MARIE

**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.

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

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

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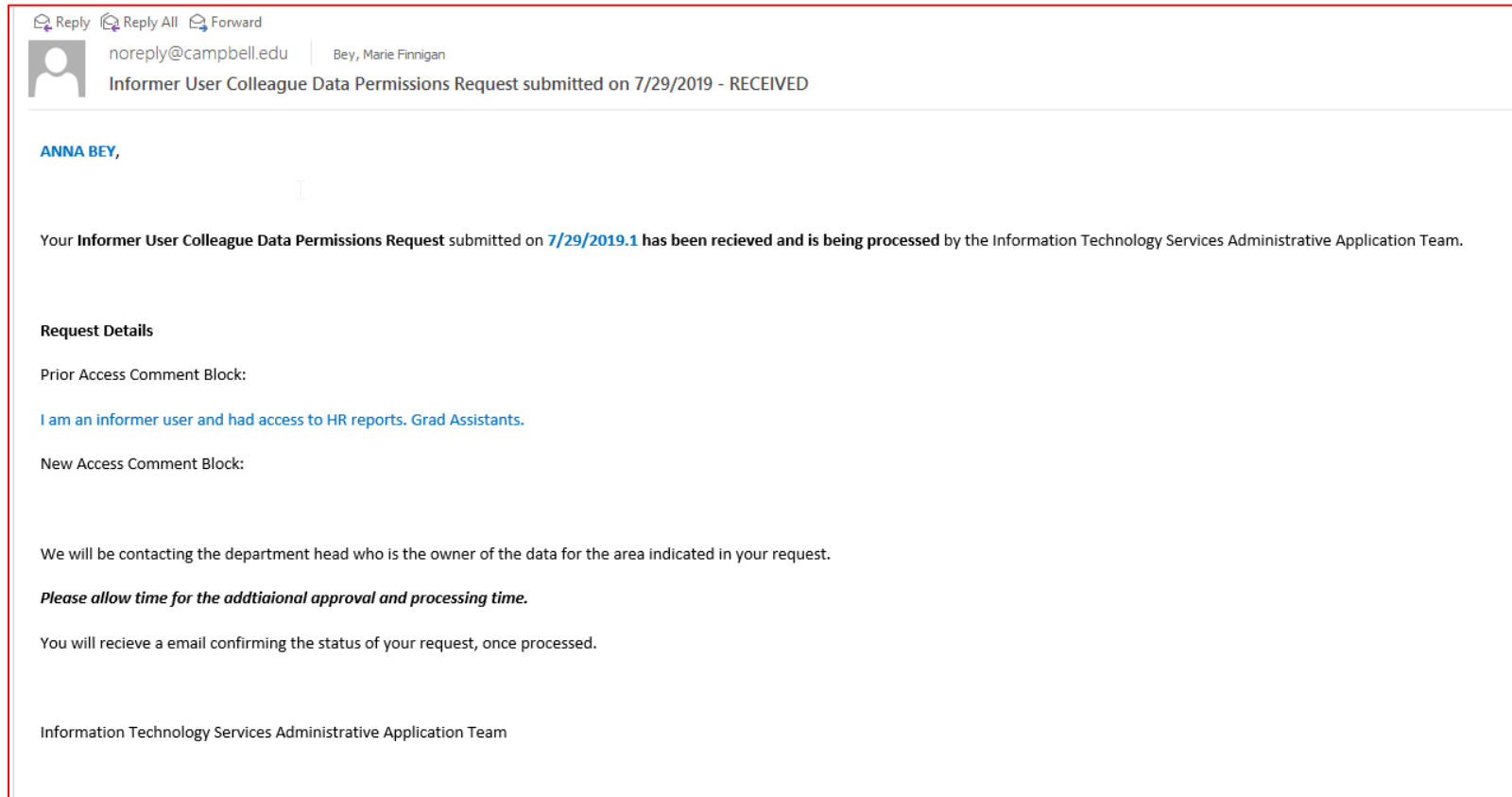
 **Second Box:** Non-Informer Users who are requesting Colleague data in a report (New report creations requires a three (3) week notice.)

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, employee, faculty, applicants, applications, etc.) Also, list the columns you would like in your report (example student ID, last name, first name, GPA, etc.)

2. Click 'Submit':

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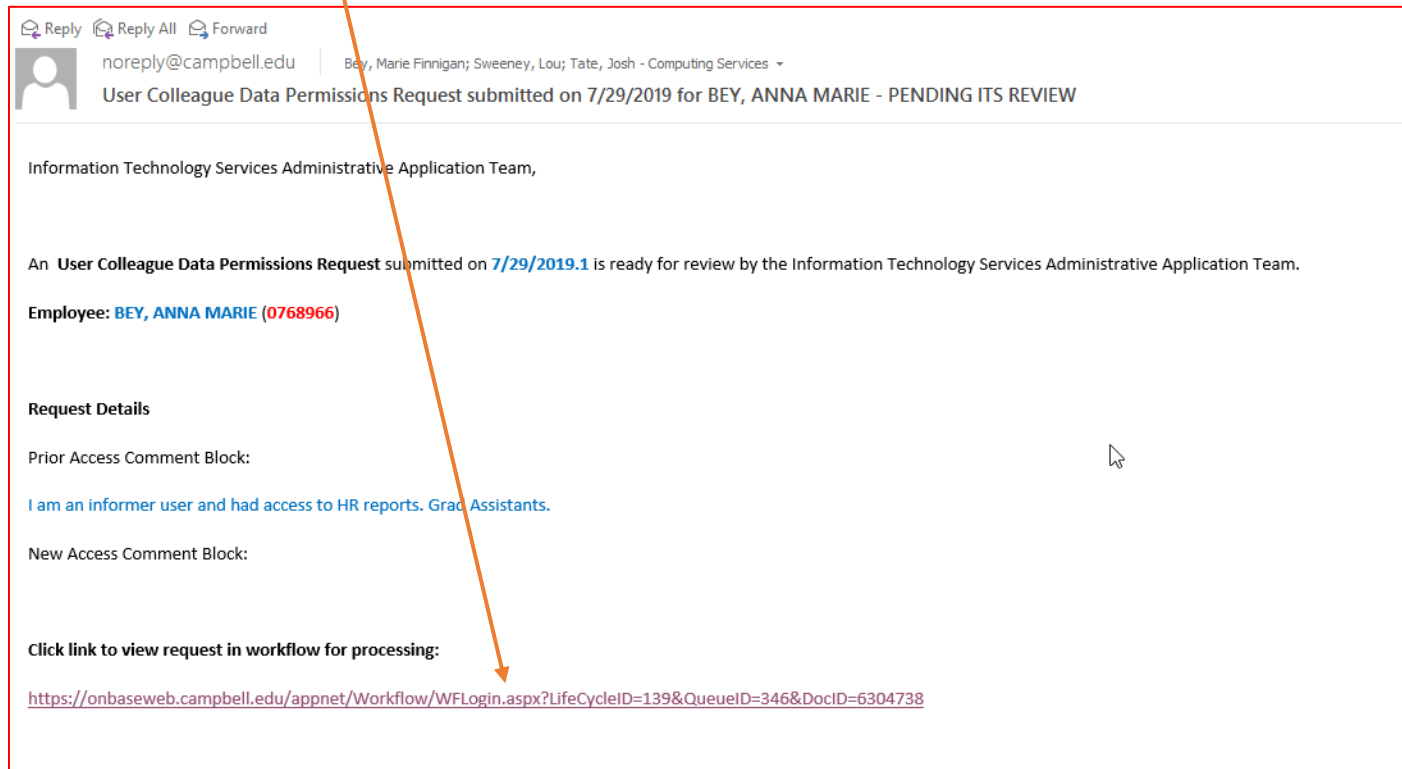
3. Notification E-mail: Requestor will receive a notification with the requested information and that IT Services will forward your request to the appropriate department based on the data asked for.



# Informer User Colleague Data Permission Request – Procedures

## 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.





# Informer User Colleague Data Permission Request – Procedures

This is what the request looks like in OnBase. IT Services can see the original request (un-editable for audit purposes).

The screenshot shows the OnBase interface with a document titled "CUJTS\_Informer Data Permission Request - 7/29/2019 - 0768966-BEY, ANNA MARIE Req07:7/29/2019 ITSRev04: ITSStatus:SUBMITTED TO ITS DPTRRev04: ReqStatus: 7/29/2019". The document content is as follows:

### Informer User Colleague Data Permission Request

**Requestor Information**

<b>Date Requested *</b> 07/29/2019	<b>Campbell Email *</b> BEY@CAMPBELL.EDU	<b>Office Phone Number *</b> 910-890-0641
<b>Employee ID *</b> 0768966	<b>Last Name *</b> BEY	<b>First Name *</b> ANNA
		<b>Middle Name</b> MARIE

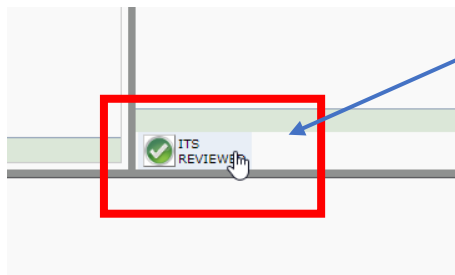
**REQUIRED IF YOU HAD PREVIOUS ACCESS TO REPORTS OR DATA. LIST THE REPORTS AND OR COLUMNS IN A REPORT THAT YOU NOW DO NOT HAVE ACCESS BUT STILL NEED ACCESS.**

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

# Informer User Colleague Data Permission Request – Procedures

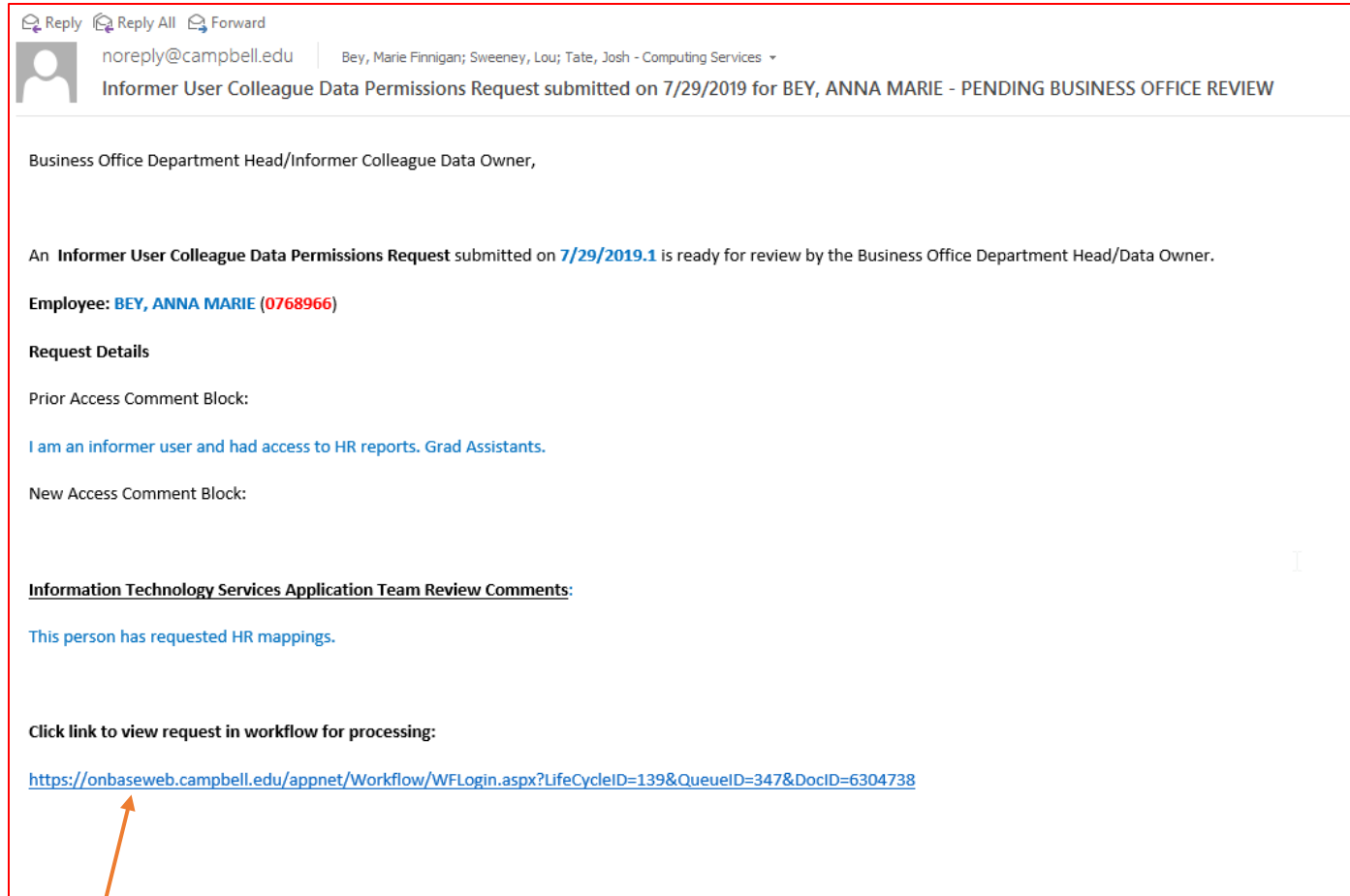
- b. IT Services will scroll down to the bottom section of the form (named: ‘Information Technology Services Application Team Initial Review’)

- 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.



# Informer User Colleague Data Permission Request – Procedures

- 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.

# Informer User Colleague Data Permission Request – Procedures

## 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.

Template: None

DEPT REVIEWED

**Processing – Department Head/Owner of Data Area Requested**

E-Signature Department Head/Data Owner  
Trent Elmore

Dept/Data Owner Processed Date  
7/29/2019

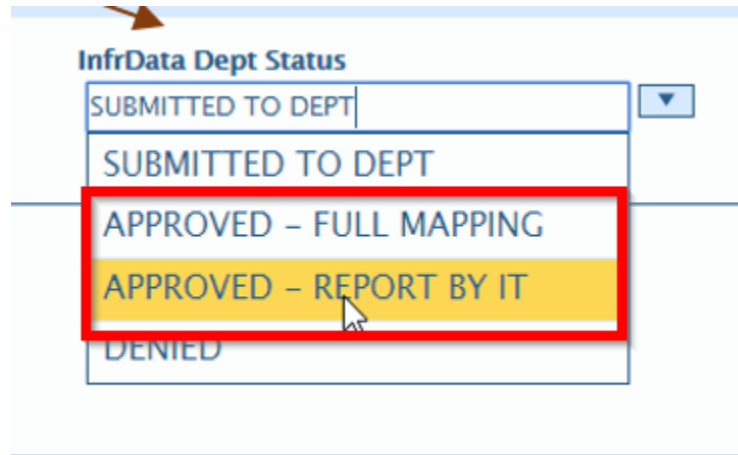
Denied Reason: !!NOTE!! What is typed in this box is what is sent to the requestor for the reason their request has been denied.

InfrData Dept Status  
SUBMITTED TO DEPT  
SUBMITTED TO DEPT  
APPROVED – FULL MAPPING  
APPROVED – REPORT BY IT  
DENIED

Submit Department Review

## Informer User Colleague Data Permission Request – Procedures

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

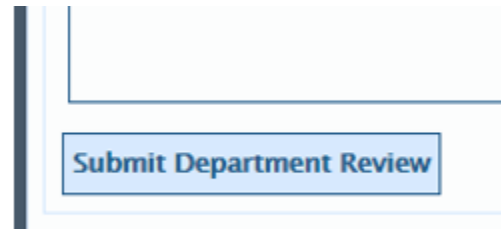
SUBMITTED TO DEPT

**APPROVED - FULL MAPPING**

**APPROVED - REPORT BY IT**

DENIED

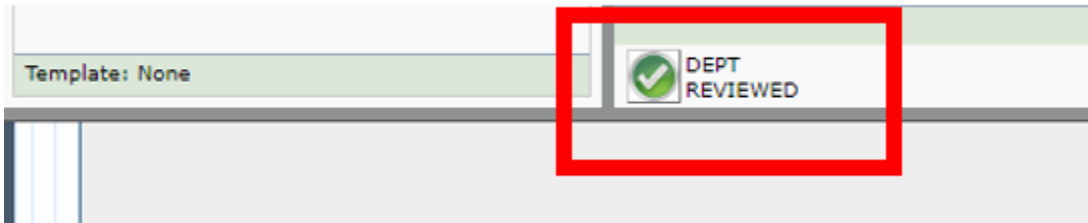
2. Click on 'Submit Department Review'



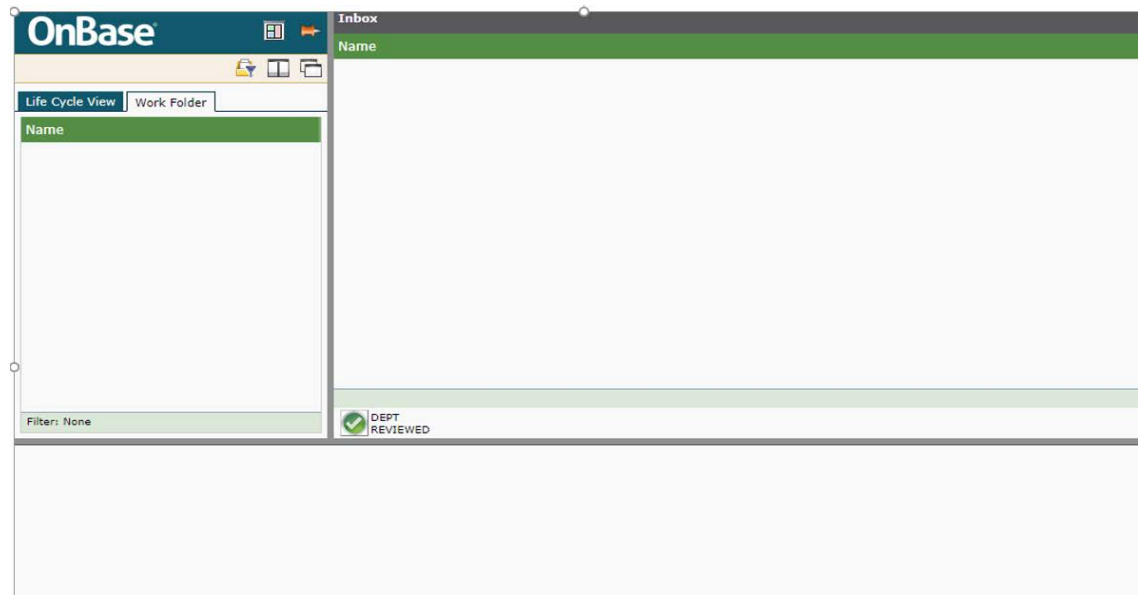
Submit Department Review

## Informer User Colleague Data Permission Request – Procedures

3. Click on 'DEPT REVIEWED' (the form is not fully submitted until the 'DEPT REVIEWED' has been clicked)

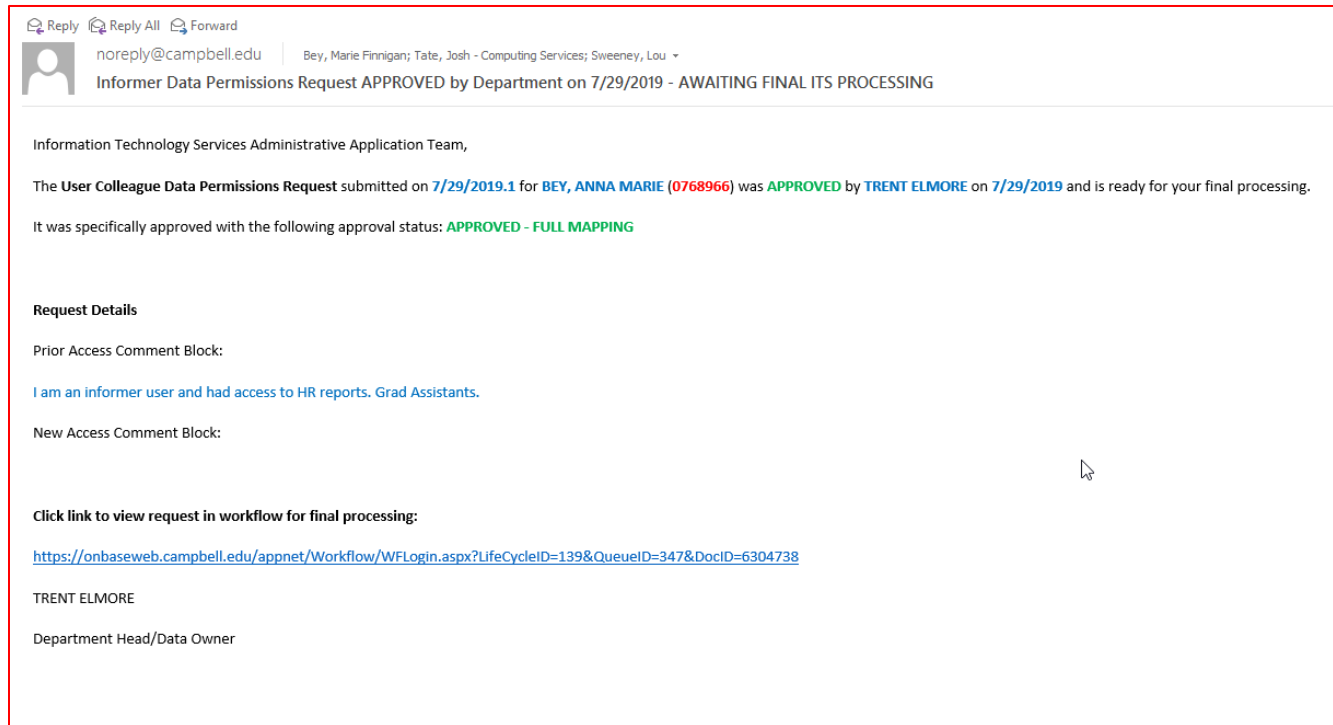


4. Once the 'DEPT REVIEWED' button is clicked, the screen will become empty.



# Informer User Colleague Data Permission Request – Procedures

5. E-mail notification to IT Services for final submission to the User.



# Informer User Colleague Data Permission Request – Procedures

## 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.

Template: None  COMPLETED

Information Technology Services Application Team FINAL Processing

E-Signature ITS Application Team\*  ITS Final Completion Date\*   Request Completed by ITS\*

Final Processing Comments/Notes  
Access to the HR mapping has been completed.

4. Once the 'DEPT REVIEWED' button is clicked, the screen will become empty as seen below.

OnBase

Inbox

Name

Life Cycle View | Work Folder

Name

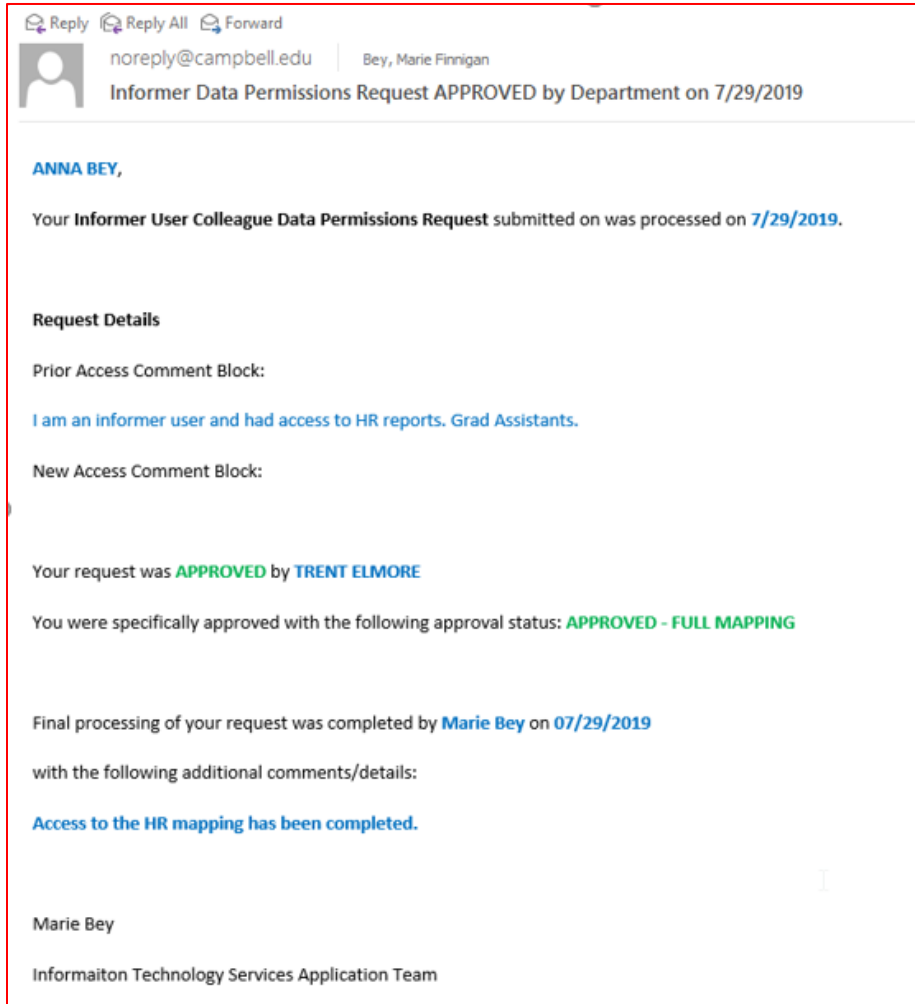
Filter: None

COMPLETED



# Informer User Colleague Data Permission Request – Procedures

- An e-mail notification goes out to the user with final notes.



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## 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*.

Processing – Department Head/Owner of Data Area Requested

E-Signature Department Head/Data Owner: Trent Elmore

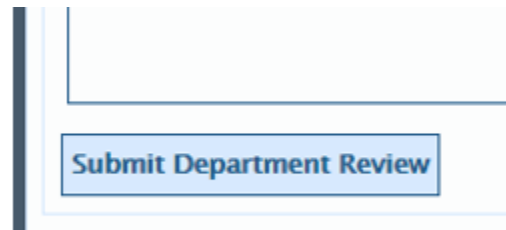
Dept/Data Owner Processed Date: 7/29/2019

Denied Reason: !!NOTE!! What is typed in this box is what is sent to the requestor for the reason their request has been denied.

InfrData Dept Status: SUBMITTED TO DEPT, SUBMITTED TO DEPT, APPROVED – FULL MAPPING, APPROVED – REPORT BY IT, DENIED

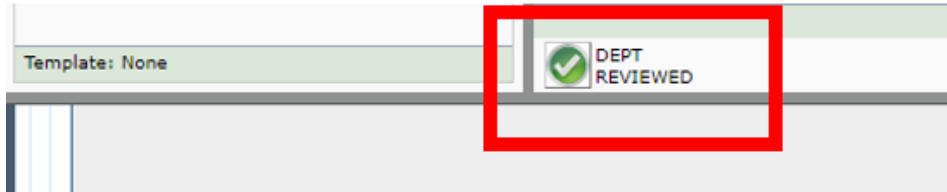
Submit Department Review

2. Click on 'Submit Department Review'

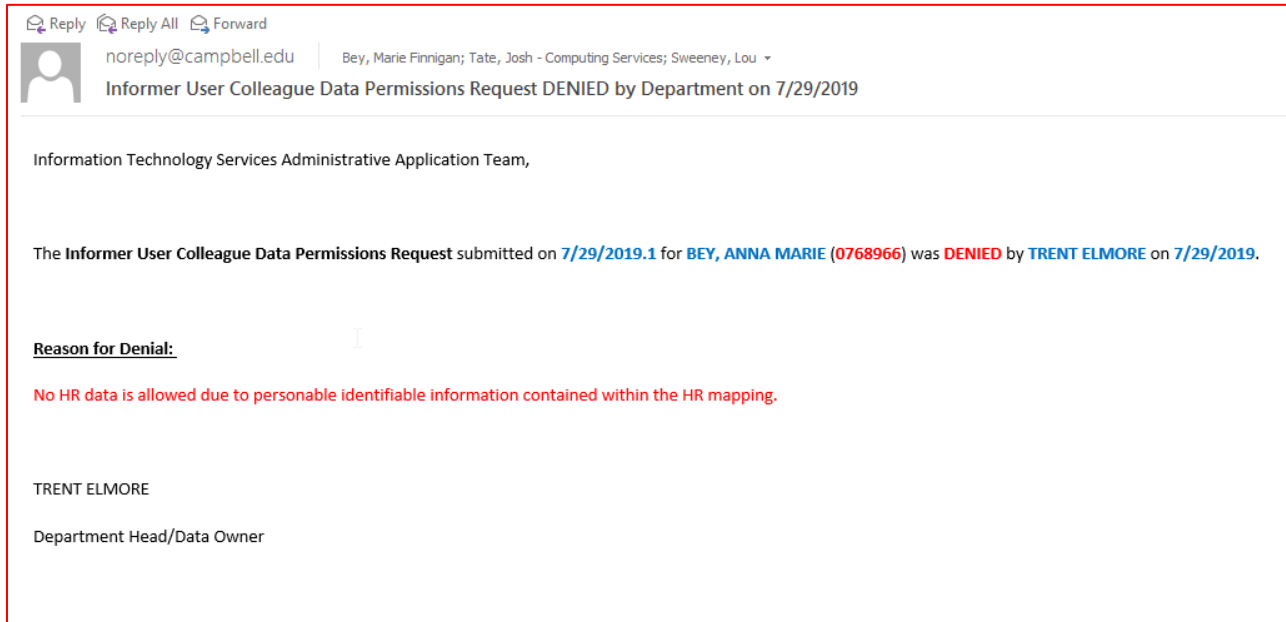


# Informer User Colleague Data Permission Request – Procedures

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.