ABSTRACT
This user guide provides an in-depth look at the functionality and characteristics of the Security Access Request form and how to initiate a request for access to various LSU financial and administrative systems.

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Financial Systems Services – fsshelp@lsu.edu
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What is the Security Access Request procedure?

It is a Business Process Management procedure developed by Financial Systems Services to promote business efficiency and effectiveness by utilizing an automated, electronic process. This web-based process will be accessed by various members of the LSU community seeking access to (or the removal of access from) the many Financial and Administrative systems available and will include automatic routing through the appropriate approval processes as prescribed by University policies. The Security Access Request can be initiated by accessing the Security Access Request link under the Financial Services heading on the left-hand side of the MyLSU desktop.

Getting Started – Data Steward Contacts Tab

Once the Security Access Request link is clicked, the form will open in a new window displaying a description of the process, a list of data stewards/system contacts that can be contacted with any access questions pertaining to their specific systems, and a link to the University’s security use policy. The security use policy must be read, understood, and agreed to by the Requestor prior to being allowed to continue with the process. The “I agree” button at the bottom of the page must be clicked to continue.
Request Tab

The first page of the process is the Request Tab and consists of entering information for the user that will be receiving the system security access. There are a few items to note on this page:

1. The Requestor name will automatically populate for access requests in the top right corner of the request.

2. Access can be requested on behalf of another user, and this determination can be made by answering the “Are you requesting access on behalf of another individual?” question. If the answer is NO, then the user information is populated to reflect that the Requestor is also the Recipient of the access that will be requested. If the answer is YES, then a PAWS ID is required. Once the PAWS ID is entered, it will be used by the system to automatically populate the remaining fields in the User Information section.

3. All Supervisors and Signature Authorities for the user will be listed as options under the Supervisor field. If none of the choices are correct, then the checkbox below the field should be checked which will notify the user’s HR contact to load the user’s correct Supervisor(s) through the Human Resources System. Once the HR contact completes that task, it will be routed back to the Requestor to continue processing.

4. This form allows you to Add and/or Remove access in a single request. In the “Add Security Items” section, first choose the system in which the function resides. Once a system is chosen, the Function dropdown box will be filtered to show all functions that exist within that system. Once the desired function is selected, an Account Scope box appears only if an Account Scope is required for the particular function access requested. Once all required fields are entered, select “Add Selected Access” to save your selections to the “Security Items to be Added/Removed” section.

5. In the “Remove Security Items - Current Access” section, you have the ability to select access to remove from the user’s account. You can select individual items by clicking the item in the grid and selecting “Remove Selected Access” or, alternatively, you can remove all access the user currently possesses by selecting “Remove All Access”.

6. The “Security Items to be Added/Removed” section is a summary of all items selected (to Add or Remove) for the request.

7. You can access the Comments Tab by clicking the tab labeled “Comments” at the top of the page or by clicking the “Add Comment” button at the bottom of the Request page.
8. If the Supervisor(s) provided in the dropdown box is/are deemed inaccurate or if no Supervisor(s) appear in the dropdown box, click the “Check if supervisor is missing or inaccurate” check box. Once the box is checked, enter the correct Supervisor information in the box that appears. This information will be automatically routed to the departmental HR contact to be corrected in the Human Resources System (HRS), and the request will then be placed back in the approval workflow (see Figure 3 and Figure 3a).

![Figure 3a: Security Access Request Form – Missing Supervisor Check Box and Text Box](image)

**Comments Tab**

This page is designed to help Requestors, users, and Approvers review any notes that have been added to the request throughout the entire process. Start by typing the comment in the Add Process Comment box and save the comment by clicking “Save Comment”. You will see your comment saved to the Process Comments log found in the Process Comments section. Each comment entry is logged with a commenter name, the commenter’s role, and the date and time of when the entry was created.

![Figure 4: Security Access Request Form - Comments Tab](image)
In order to return to the Request page click on the “Request” tab at the top of the page or click the “Return to Request” button at the bottom of the page.

**Figure 5: Navigating Between Tabs**

**Submitting the Request for Approval**

Once the access has been selected, comments are added to the request, and the Requestor is back on the Request page, there is still an opportunity to modify the Recipient information prior to submitting. Click the “Edit Recipient Information” button in the Recipient Information section. However, please note that changing the Recipient on the request will remove all access added to the request for the previously selected Recipient, and the Requestor would have to add the access for the new Recipient once the new Recipient is chosen. If the Recipient information is correct and the Requestor is ready to submit the request, clicking the “Submit” button at the bottom of the page will submit the request for approval.

**Figure 6: Submitting the Request**
A confirmation box will appear once the request is submitted. Clicking “OK” will close the window.

**Email Confirmation of Submitted Request**

Once the request is submitted for approval, the Requestor will receive an email notification containing the pertinent request details confirming the successful security access request submission. The Recipient of the access for which the request was submitted will also be copied on the email.

```
Dear Mike The Tiger,
Your security access request for Tiger. Jacob was successfully submitted. The request details are below:

**Stage:** Request Submitted  
**Requestor:** The Tiger, Mike  
**Recipient:** Tiger, Jacob  
**Request Reference Nr:** 275

**Items Requested:**

<table>
<thead>
<tr>
<th>Requested Action</th>
<th>System Security Functions</th>
<th>Scope</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADD</td>
<td>GLS VIEW/INITIATE/BALANCE GLS ENTRIES (GLSUPDATE)</td>
<td>18839000</td>
</tr>
<tr>
<td>REMOVE</td>
<td>HRS FULFILL BUSINESS MANAGER ROLE WITHIN A UNIT</td>
<td>18839000</td>
</tr>
</tbody>
</table>

**Comments:**

<table>
<thead>
<tr>
<th>Role</th>
<th>Employee</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requestor</td>
<td>The Tiger, Mike</td>
<td>test</td>
</tr>
</tbody>
</table>

This is official correspondence from Louisiana State University.

Any security questions regarding this security access request should be sent to finsec@lsvu.edu. In order to view Security Access Request user guides and tutorials, please click here.
```

**Explanation of Required Approvals**

There are three stages at which the request will have to pass through in order to obtain various required approvals:

1. **Supervisor/Signature Authority stage** – the user’s Supervisor or the Signature Authority that was chosen by the Requestor on the request (all possible choices would be given in the dropdown box).

2. **Department Head/Dean stage** – the individual(s) responsible for the account scope(s) of the function(s) selected on the request. A unit’s Signature Authority, Business Manager, Department Head, or Dean’s approval (in this order) will be used to satisfy this stage’s approval requirement. For example, if access was requested for both the function “VIEW/INITIATE/BALANCE GLS ENTRIES (GLSUPDATE)” for account scope of 12345 and the function “VIEW AND INITIATE GLS ENTRIES (GLSVIEW)” for account scope 54321,
then the business manager for account scope 12345 as well as the business manager for account scope 54321 (if no Signature Authority for the account scopes exist) would have to approve the requested functions for their respective account scopes on the request. If no Signature Authority or business manager exists for that particular account scope, then the Department Head would have to approve the particular functions requested.

3. **Data Steward stage** – the individual appointed as the data steward for the system to which the requested function belongs. For example, the “VIEW/INITIATE/BALANCE GLS ENTRIES (GLSUPDATE)” function is found under the system of GLS. Therefore, the data steward for GLS would have to approve all of the functions requested that fall under GLS on each request (unless the data steward has chosen to allow particular functions for systems they are responsible for to be by-passed at the data steward approval stage if the Recipient’s Supervisor and Department Head approves).

Each stage besides the Supervisor stage could potentially require multiple approvers prior to allowing the progression of the request to the next stage. Every approver at all stages will receive an email with a summary of the request, a link to click in order to view the request, and an explanation of how the request can be approved by simply replying to the email (as described above).

The procedure will automatically recognize requests that have one individual fulfilling multiple roles within the same request (i.e. one individual is the user’s supervisor and the data steward for a system to which a function requested belongs) and will only require that individual to approve once. The one approval will satisfy both stages for which the individual’s approval is needed.

Once all three stages’ approvals are satisfied, the responsible security officer will automatically receive the request and will load the necessary access. The Requestor will receive an email confirming which access requested was successfully approved and actually put in place by the security officer.

**Subsequent Request Tracking**

The Requestors and Approvers of security access requests that have been submitted can track the progress of any requests by visiting their LSU BPM Portal by clicking on “LSU BPM” after logging in to myLSU as seen in Figure 10.

See Figure 11 below. Once in the LSU BPM Portal, you will notice two main sections: “To Do List” and “Watch List”. The To Do List contains all requests for which the person visiting the portal needs to action with either an approval or disapproval decision. The section contains the Process Name of the request, the Stage name for the stage in which the request is sitting, and the Start Date the request was initiated. There is also a link in underlined blue font named “Process Request” which, once clicked, allows users to view the request in order to approve or disapprove it.
The second main section is entitled “Watch List” and contains all requests for which the person visiting the portal has either originally initiated or previously approved. These requests can be clicked on in order to view their progress if still in process or to view the final details if the request is completed or cancelled. Requests will remain on the Watch List for 90 days after the request is completed or cancelled and will then subsequently be archived and removed from the list.

![LSU BPM Portal](image)

Figure 11: LSU BPM Portal

See the LSU BPM Introduction link on the FSS website to learn more about the LSU BPM Portal.