

OREGON HEALTH & SCIENCE UNIVERSITY

User Guide for Self Service Access Requests

University Applications Management Division

4/22/2010

This document outlines the procedures for using and maintaining the Oracle Self Service Access Request System for both end users and administrators

User Guide for Self Service Access Requests

Contents

- Overview 3
- End user procedures 4
 - Requesting a new role 4
 - Reviewing the Status of a Role You Requested 7
 - Approval of a new role request 8
 - Requesting Roles in Test Instances 9
 - Surrogate approvers (in the event of extended approver absence) 9
- Approver procedures 10
 - Responding to a request for approval 10
 - Delegating approval when you are away from the office..... 11
- Where to go for support. 11

User Guide for Self Service Access Requests

Overview

The Oracle Self Service Access Request system allows an Oracle user to request new roles on their own behalf. The self service system provides an online method to request Oracle Access online. The request itself is as simple as logging in, selecting a role, entering a justification and submitting the request. Once a user submits a request, the approvals process begins. The approver(s) for each role is based on the module and functionality of that role. Approvers are notified of the request by email. The email contains a link taking the approver into Oracle where they can approve or reject the request. Once the request is rejected, or the final approval is submitted, an email is sent to the requestor notifying them of the outcome. If approved, the role is granted in Oracle within minutes of the final approval.

User Guide for Self Service Access Requests

End user procedures

Requesting a new role

The first step in requesting additional roles in Oracle applications is to visit the Computer access web site where you will use Self service access or Oracle Access Request forms depending on the specific role you are requesting. Self service is a very efficient way to request the most popular roles that are listed on the page. Below is the initial page on the computer access website that introduces Self Service access, list the supported roles, and provide a button to navigate to the Self Service system.

ORACLE ACCESS

SELF SERVICE ACCESS

New! - Use Oracle's online access request system for the following access.

- Prepare Requisitions (request only) ?
- Manage General Ledger Accounting Data ?
- View Purchasing & AP Inquiry Information ?
- Prepare Foundation Requisitions (request only)?
- AP Inquiry 1 OHSU AIS
- AR inquiry OHSU AIS
- Assets inquiry OHSU AIS
- GL Inquiry 1 Inquiry OHSU AIS
- GL Inquiry FSG OHSU AIS
- PA Inquiry OHSU AIS
- PO Inquiry 1 OHSU AIS
- OGA All Project Inquiry OHSU AIS or
OGA All Project Inquiry Payroll OHSU AIS
- HRE Reports OHSU AIS
- HR Inquiry OHSU AIS
- HRE Approver OHSU AIS
- IRC HR Mission OHSU AIS
- HR Mission Staff OHSU AIS
- Maintenance Super User OHSU AIS
- Maintenance User Workbench OHSU AIS
- Maintenance PM Planning OHSU AIS
- Work Order Details and Reports FAC OHSU AIS
- Inv Inquiry FAC OHSU AIS

Click here for **Oracle Self Service Instructions**

[Oracle Self Service Access System](#)

To request **FISCAL AUTHORITY**, or access to **DISCOVERER**, the **Foundation**, or **any roles not listed above**, click the button below.

[Oracle Access Request Forms](#)

Once you click the button to use the Oracle Self Service Access System you are taken to a page that shows your currently assigned roles. You can filter the list, change the sort order or change the number of roles displayed. Any pending requests are shown at the top right corner of the page...

User Guide for Self Service Access Requests



Request Reports Admin

Assigned Roles |

Role List

Request Submitted.

Currently Assigned Roles

Create New Request

Rows 15

Role ▲	Status	Active From	Active To
AK Developer	APPROVED	12-DEC-2005	-
AP Inquiry 1 OHSU AIS	APPROVED	23-FEB-2010	-
AP Inquiry 2 OHSU AIS	APPROVED	03-MAR-2003	-
AP Inquiry 2 OHSU OLD CHART AIS	APPROVED	03-MAR-2003	-
Approvals Management Administrator	APPROVED	08-JUN-2006	-
Approvals Management Business Analyst	APPROVED	08-JUN-2006	-
AutoSave Responsibilities AIS	APPROVED	12-DEC-2005	-
Employee Self Service OHSU AIS	APPROVED	22-JUL-2003	-
Employee Self-Service (1)	APPROVED	09-OCT-2003	-
FDN IP Requestor AIS	APPROVED	23-FEB-2010	-
FDN PO Receiver AIS	APPROVED	23-FEB-2010	-
FDN PO Requestor AIS	APPROVED	23-FEB-2010	-
FPP General Ledger Inquiry 2 AIS	APPROVED	12-DEC-2005	-
Facilities Work Request OHSU AIS	APPROVED	01-JUL-2007	-
Flexfield Administrator 1 OHSU AIS	APPROVED	12-DEC-2005	-

1 - 15 of 77

Create New Request

Pending Requests

Role ▲	Status	Active From	Active To
Assets Inquiry OHSU AIS	PENDING	24-MAR-2010	30-APR-2010
			1 - 1

Click "Create New Request" and you are taken to the New request page...

User Guide for Self Service Access Requests



Add Role
Cancel Submit

* Category Top 25

* New Role AR Inquiry OHSU AIS
Approved by Russell, Debra J (Debbie) (russelld@ohsu.edu)

Review receivables for our organization

* Justification

From Date 24-MAR-2010

To Date 30-APR-2010

The category “Top 25” is the default category, and the only category available in the first phase of this application. The red asterisk indicates a field is required.

Select your new role from the new role drop down list. This list shows only the roles that you do not already have.

Enter a justification as to why this role is needed to complete your job duties.

If you are requesting a role temporarily, you may enter a future start date and end date, or just an end date, or both. Otherwise, leave these blank and the role will be granted immediately with no end date.

Click the “Submit” button when complete to send the request for approval.



Pending Requests

Rows 15 Go

Active From	Active To
12-DEC-2005	-
23-FEB-2010	-
03-MAR-2003	-

Role ▲	Status	Active From	Active To
AR Inquiry OHSU AIS	PENDING	24-MAR-2010	30-APR-2010
			1 - 1

While your request in the approval process, it will show in the pending request window.

User Guide for Self Service Access Requests

Reviewing the Status of a Role You Requested

To review the progress of your request click the report tab where you will see the information sent to the first approver.

The screenshot shows the OHSU Self Service Access Request system interface. At the top left is the OHSU logo. On the right are icons for printing, refreshing, and help. Below the logo is a navigation bar with tabs for 'Request', 'Reports', and 'Admin'. The 'Reports' tab is selected. Below the navigation bar is a 'Notifications' header. Underneath is a search bar with a magnifying glass icon, a 'Rows' dropdown set to '50', a 'Go' button, and a settings gear icon. Below the search bar is a 'Request' checkbox with a grid icon, a checkmark, and a red 'X' icon. The main content area is titled 'Request : 57' and contains a table with the following data:

Role Name	Action	Status	Begin Date	End Date	From User	To User	Responder	Subject
AR Inquiry OHSU AIS	Requested	OPEN	24-MAR-2010 12:16:59	-	Schloff, Jim	Russell, Debbie	-	Role Request 57 (AR Inquiry OHSU AIS) for James M Schloff

After each approval a new line is presented with the information forwarded to the next approver. When the last approver approves, or rejects the request, a final line appears in the report that shows the approval notification which is sent to you via email. You will receive the email and the requested access will be granted within 10 minutes of the final approval.

The screenshot shows the OHSU Self Service Access Request system interface, similar to the previous one. The 'Reports' tab is selected. Below the search bar is a 'Request' checkbox with a grid icon, a checkmark, and a red 'X' icon. The main content area is titled 'Request : 57' and contains a table with the following data:

Role Name	Action	Status	Begin Date	End Date	From User	To User	Responder	Subject
AR Inquiry OHSU AIS	Requested	CLOSED	24-MAR-2010 12:16:59	24-MAR-2010 12:21:14	Schloff, Jim	Russell, Debbie	Schloff, James M (Jim)	Role Request 57 (AR Inquiry OHSU AIS) for James M Schloff
AR Inquiry OHSU AIS	Approved	CLOSED	24-MAR-2010 12:22:59	24-MAR-2010 12:23:00	-	Schloff, Jim	-	Role Request 57 (AR Inquiry OHSU AIS) for James M Schloff has been approved

User Guide for Self Service Access Requests

Approval of a new role request

The chain of approvers for a request depends on the role that was requested. Generally, the first approver is the requestors manager and the second approver is a steward for the application related to the requested role. In some cases additional approvers are added for training and financial approval purposes.

If you are an approver, you will get an email notification advising you that you have an Oracle approval notification. Click the link in the email to navigate to the notification. You will be prompted to log in to Oracle.

The notification is shown below and it contains the following information.

- Requestor name
- Role requested
- Date sent
- Email address of requestor
- Username of requestor
- Justification – the justification also has information appended for the start date and end date of the request and the requestors employee number, position number, and home org.
- Any prior approvals

The screenshot displays the Oracle Administrator Workflow interface. At the top, there is a navigation bar with the OHSU logo and the text 'Administrator Workflow'. Below this, there are several tabs: 'Home', 'Developer Studio', 'Business Events', 'Status Monitor', 'Notifications', and 'Administration'. The 'Administration' tab is currently selected. Underneath the tabs, there is a breadcrumb trail: 'Workflow Configuration | Vacation Rules | Notification Search'. The main content area shows a notification titled 'Role Request 57 (AR Inquiry OHSU AIS) for James M Schloff'. To the right of the title are two buttons: 'Approve' and 'Reject'. The notification details include: 'From: Schloff, Jim', 'To: Russell, Debbie', 'Sent: 24-Mar-2010 12:16:59', 'ID: 5272234', and 'Requested Role: AR Inquiry OHSU AIS'. Below this, the 'Request Information' section lists: 'Name: James M Schloff', 'Email Address: schloffj@ohsu.edu', 'User Name: SCHLOFFJ', and 'Justification: Start Date: 24-MAR-2010 End Date: 30-APR-2010 *** Review receivables for our organization *** eMail: schloffj@ohsu.edu Employee Number: 45554 Position Number: 074330 Home Org: IT.UAMD-University Applications Management Division (88251)'. An 'Action History' table is shown below the justification, with one row indicating a 'Submit' action on 24-Mar-2010 12:16:59 by Schloff, Jim to Russell, Debbie. At the bottom, there is a 'Response' section with a 'Note' field and a text area for entering a response.

Appropriate responses are either approve or reject. Once the response is given, the notification is erased from your queue and the next approver is immediately notified. Upon final approval or rejection, an email is sent to the requestor informing them of the final outcome. If approved the new role is granted in minutes.

User Guide for Self Service Access Requests

Requesting Roles in Test Instances

If you want a role in all test instances you need to request it in FISDEV. Once granted the role will be granted in other test instances as they are refreshed. If you need a role immediately in a test instance other than FISDEV, you will need to request it in that instance. If you want it to be permanent you will need to request it in FISDEV as well. Otherwise, the role assignment is lost during the next refresh.

Surrogate approvers (in the event of extended approver absence)

If the requestor needs the role granted while an approver is absent, the requestor can email Oracle access (oarf@ohsu.edu) who will forward the notification to the backup approver. The backup approver will then review and respond to the request.

User Guide for Self Service Access Requests

Approver procedures

Responding to a request for approval

You will receive an email when a notification is pending your response. This is a standard email generated from Oracle workflow and provides basic information about the request and allows you to click a link to log into Oracle and review the notification. You will be prompted for your network username and password to log in to Oracle. The notification appears automatically...

The screenshot displays the Oracle Administrator Workflow interface. At the top, the OREGON HEALTH & SCIENCE UNIVERSITY logo is visible on the left, and the title 'Administrator Workflow' is centered. Navigation links include Home, Logout, Preferences, Help, Personalize Page, and Diagnostics. Below the title bar, a menu contains Home, Developer Studio, Business Events, Status Monitor, Notifications, and Administration. The main content area shows a notification for 'Role Request 155 (GL Inquiry FSG OHSU AIS) for Yuliani Rokosz'. The notification details include: From: Rokosz, Yuliani; To: Catalan, Sandy; Sent: 07-Apr-2010 09:37:08; ID: 5272460. The Request Information section lists: Name: Yuliani Rokosz; Email Address: aisinfo@ohsu.edu; User Name: ROKOSZY; Justification: Start Date: 07-APR-2010 End Date: NA; *** test *** eMail: aisinfo@ohsu.edu Employee Number: 52119 Position Number: 006215 Home Org: FA.Accounts Payable (87215). An Action History table shows one action: Submit on 07-Apr-2010 09:37:08 by Rokosz, Yuliani to Catalan, Sandy. A Response section with a text area is present. At the bottom, there are 'Approve' and 'Reject' buttons, and a 'Return to Worklist' link. The footer contains copyright information for Oracle (c) 2006 and a Privacy Statement link.

Most of the information is self explanatory. The justification field contains three specific pieces of information separated by three asterisks (***):

1. The start and end date of the request for temporary requests.
2. The justification test entered by the requestor.
3. Specific information used by Central Financial Services to complete the role assignment.

Your options are to approve or reject the request. A rejection terminates the process and sends an email to the requestor notifying them of the rejection. An approval forwards the request to the next approver or executes the assignment if you are the final approver. Upon final approval the requestor is notified of the approval and assignment of the requested role.

All approval activity is archived permanently for audit purposes.

User Guide for Self Service Access Requests

Delegating approval when you are away from the office

If you are leaving the office for more than a few days you should take the following steps:

1. Notify computer access of your absence and insure they have the name and email of one or more surrogate approvers that can approve your access request notifications in your absence. In the event that a notification is pending your approval, Oracle access can delegate the approval to your designated surrogate approver.
2. If you are going to be away for an extended time, instruct computer access to update the system with a new approver as appropriate for the specific roles.
3. Approve or reject any pending notifications before you leave.

The above steps insure that requests will be process accurately and efficiently in your absence.

Where to go for support.

- For end user questions on how to use the system or technical issues contact the Financial Support Center fse@ohsu.edu
- For approver changes contact the Oracle Access team oarf@ohsu.edu
- To check on a pending request use the reports tab in the Oracle Self Service Access Request System. Find the last notification for the request. If the status is approved or rejected, the request is completed. If the status is open, the "To User" is the approver that has not yet responded. Contact that approver to expedite a response.