CSS Instructions

Creating Security Request Form

- Log in to the My BGSU portal and select “Security Request” under MISC SERVICES within the Employees tab. You will be redirected to the Security Request launch page within the PeopleSoft environment.
- Click the Add Request button to start a new request

On the Security Request page type “CSS” into the Environment field or click on the magnifying glass to open the Look Up Environment search page and select “CSS”

Tip: Use the Magnifying Glass to search for values.
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- Click the **Add** button to start a new request

- Your user name and contact information will default into their respective fields. If you are requesting access for yourself, leave your user name in the **BGSU User Name** field.

- If you are requesting access for someone else, enter their user name into the BGSU User Name field or click on the **magnifying glass** to search for the person.

- If the system is unable to determine any of the contact information for yourself or the person you are requesting access for, you will be required to enter name, BGSU ID, job title, department and business phone number details. Some examples of when this might happen is for new employees or guests/contractors that need system access.

- Enter the **Effective Date** for the request

- Enter the **campus affiliation** for the person
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- If you are making a request to remove all access to the environment, **check the Remove All Access checkbox**. Examples of when a request to remove all access might be submitted include an employee leaving BGSU through retirement or termination or a change in the employee’s department or job responsibilities. No further action can be taken on the request page if you select this option.

  ![Remove All Access Checkbox]

**Adding CSS Access Roles**

- CSS access roles are grouped by functional area. The magnifying glass can be used to search for and select applicable functional areas. Functional access areas will be defined as “ACCESS ROLES” in the lookup.

- Use the ![icon] to add additional access role functional areas as needed

**Look Up**

<table>
<thead>
<tr>
<th>Environment Area</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSS</td>
<td>3C Groups ROW LEVEL SECURITY</td>
</tr>
<tr>
<td>CSS</td>
<td>Academic Plan ROW LEVEL SECURITY</td>
</tr>
<tr>
<td>CSS</td>
<td>Academic Program ROW LEVEL SECURITY</td>
</tr>
<tr>
<td>CSS</td>
<td>Admissions ACCESS ROLES</td>
</tr>
<tr>
<td>CSS</td>
<td>Admissions Actions ROW LEVEL SECURITY</td>
</tr>
<tr>
<td>CSS</td>
<td>Application Center ROW LEVEL SECURITY</td>
</tr>
<tr>
<td>CSS</td>
<td>Campus Community ACCESS ROLES</td>
</tr>
<tr>
<td>CSS</td>
<td>Financial Aid ACCESS ROLES</td>
</tr>
<tr>
<td>CSS</td>
<td>Milestones ROW LEVEL SECURITY</td>
</tr>
<tr>
<td>CSS</td>
<td>Program Actions ROW LEVEL SECURITY</td>
</tr>
<tr>
<td>CSS</td>
<td>Recruiting Center ROW LEVEL SECURITY</td>
</tr>
<tr>
<td>CSS</td>
<td>Service Indicators ROW LEVEL SECURITY</td>
</tr>
<tr>
<td>CSS</td>
<td>Student Financials ACCESS ROLES</td>
</tr>
<tr>
<td>CSS</td>
<td>Student Group ROW LEVEL SECURITY</td>
</tr>
<tr>
<td>CSS</td>
<td>Student Records ACCESS ROLES</td>
</tr>
<tr>
<td>CSS</td>
<td>Test ID ROW LEVEL SECURITY</td>
</tr>
</tbody>
</table>

Tip: Click on the **Details** icon to see more information about the functional area

Tip: Use the **magnifying glass** to search for functional areas defined as “ACCESS ROLES”
• Within each functional area you will need to add the specific role(s) you are requesting access to. Use the **magnifying glass** to search for available roles within the functional area.

![Search Results](image1)

- Tip: Use the **magnifying glass** at the Role level to search for specific roles you are requesting access to.

- Tip: Click on the **Details** icon to see more information about the Role.

• For each role, you must indicate whether you are requesting that the role be added to or removed from your access by selecting the appropriate value from the Add/Remove drop down.
Tip: Use the + and - icons to add additional functional areas and additional roles within a functional area. The - icon will delete areas and roles from the request.

- When using the + icon, you will be prompted for the **number of rows** you wish to add.
- *The look of this prompt will vary by internet browser and you may be required to disable pop-up blockers:*

```
The page at https://hcm82dev.bgsu.edu says:

Enter number of rows to add:  

[OK] [Cancel]
```

```
hgsu.edu needs some information

Script Prompt: 
Enter number of rows to add:

[OK] [Cancel]
```

- Note: When adding the **BG_ADVISOR_SS** role, the system will automatically add all Milestones and Student Groups to the request. You are not required to add them yourself.

```
Message

For Role BG_ADVISOR_SS, the Student Group and Milestones will be added upon Submit.
```
Adding CSS Row Level Security

- CSS Row level security is also grouped by functional areas. Use the magnifying glass to search for applicable functional areas defined as “ROW LEVEL SECURITY”

- For Academic Organizations, Academic Plans, Academic Programs, Admission Actions, Application Centers, Program Actions, Recruiting Centers, you will need to add the appropriate code(s) and select whether you are requesting the code be added or removed from your access. Click on the Details link to see information.

- For 3C Groups, you will need to add the appropriate group(s), choose the level of access and select whether you are requesting the group be added or removed from your access. Click on the Details link to see information.
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- For **Milestones**, you will need to add the appropriate milestone(s), choose the level of access and select whether you are requesting the milestone be added or removed from your access. Click on the Details link to see information.

![Milestones Table]

- For **Service Indicators**, you will need to add the appropriate indicator(s) and reason(s), choose the level of access and select whether you are requesting the milestone be added or removed from your access. Click on the Details link to see information.

![Service Indicators Table]

- For **Student Groups**, you will need to add the appropriate group(s), choose the level of access and select whether you are requesting the group be added or removed from your access. Click on the Details link to see information.

![Student Groups Table]
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- A request can include any combination of Roles and Role Level Security. Separate requests are not necessary.

Enter comments if additional information about the request is warranted.

If you are requesting access for yourself you will be required to acknowledge your agreement to the BGSU IT Policy and University Code of Ethics by checking the box next to the following statement.

- Click on the Submit button to save the request and start the workflow approval process.
Understanding CSS Approval Workflow

- Clicking the **Details** button for any of your request will enable you to see the current status of that request and where the request is in the approval workflow. The approval workflow will have three stages.
- The first workflow stage is Employee and Manager Approvals
  - If you are requesting access for yourself, your manager/supervisor will need to approve the request. By agreeing to the IT Policy and Code of Ethics, your approval will be recorded as self-approved at the time you submitted the request.
  - If you are requesting access for one of your direct reports, the employee will be required to access the request, sign off on the policy statement and approve the request. As the requester, your approval will be recorded as self-approved once the employee completes their step.
  - If you are requesting access for an employee who does not report to you, the employee will be required to access the request, agree to the IT Policy and Code of Ethics statement and approve the request. The employee’s manager/supervisor will then need to approve the request.
- If you are requesting access for an individual who is not an employee of BGSU, your manager/supervisor will need to approve the request.
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- The second workflow stage is Functional Approval
  - The type and number of approvals will depend on what specific functional access is being requested.

![Functional Area Approval](image)

- The third and final stage is Information Technology Services Approval
  - This approval serves as the final approval once the access has been applied to the PeopleSoft environment.

![ITS Approvals](image)

Approving CSS Security Requests

- As an employee, manager/supervisor or functional approver, you may be required to approve security requests.
- If a security request has entered your workflow queue, you will receive an email indicating that the request in waiting on you to take action.

![Email Example](image)
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- To access the request, **click on the link within the approval request email**. You will be redirected to the Security Request Approval page where you will see a list of requests currently in your workflow queue.

<table>
<thead>
<tr>
<th>Security Requests</th>
<th>Personalize</th>
<th>Find</th>
<th>View All</th>
<th>First</th>
<th>Next</th>
<th>Prev</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request ID</td>
<td>Environment</td>
<td>BGSU ID</td>
<td>Name</td>
<td>Requester's ID</td>
<td>Requester's Name</td>
<td>Submitted Workflow Status</td>
<td></td>
</tr>
<tr>
<td>0000000000</td>
<td>CSS</td>
<td>0000054647</td>
<td>Michael J</td>
<td>0020051200</td>
<td>David H</td>
<td>002202015</td>
<td>In Approval Process</td>
</tr>
</tbody>
</table>

- From the list, click on the **Request ID** to select the request you wish to take action on.
- If someone created the request for you, as the employee, you will be required to agree to the IT Policy and Code of Ethics by clicking on the box next to the statement.

![EE and Manager Approval](image)

- **To approve or deny the request**, simply click on the appropriate button. As an approver, you can also enter comments related to your approval or denial of the request.

![Comment](image)

- Once the security request has made its way through all the approvals, the requester will receive an email indicating that the request was applied to the appropriate PeopleSoft environment. In the event that the request was denied at any point in the workflow, the requester will receive an email indicating that the request was denied.

Fri 6/19/2015 1:50 PM
ernoreply@bgsu.edu
Security request approved

To

Your recent PeopleSoft Security Request has been approved:

- Environment: CSS
- Request ID: 00000000003
- Effective Date: 2015-06-19
- Name: David H
- Requester: Michael J