

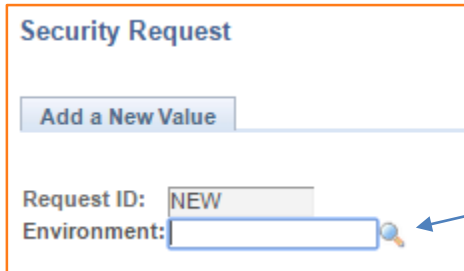
# CSS Instructions

## Creating Security Request Form

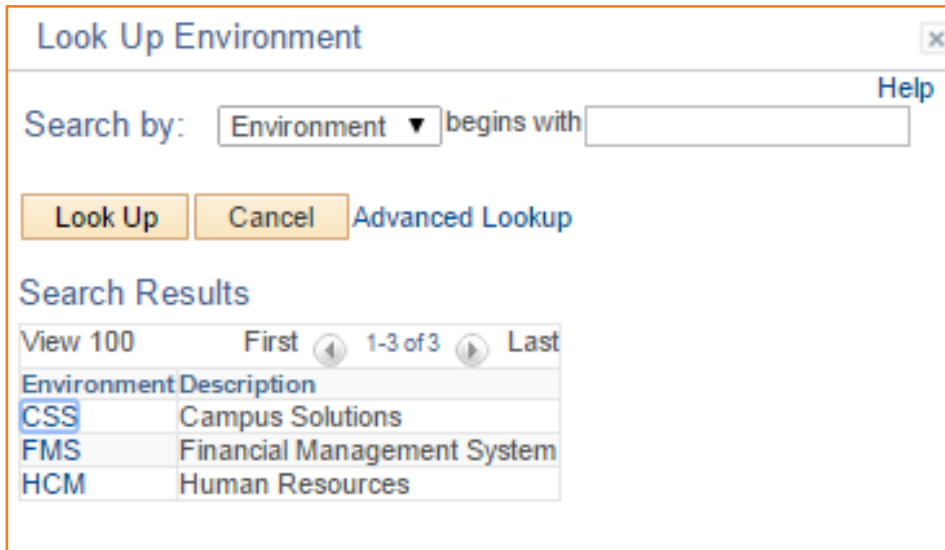
- Log in to the My BGSU portal and select “**Security Request**” under MISC SERVICES within the Employees tab. You will be redirected to the Security Request launch page within the PeopleSoft environment.
- Click the **Add Request** button to start a new request



- 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**”

A screenshot of the "Security Request" form. At the top left is the title "Security Request". Below it is a blue button labeled "Add a New Value". Underneath, there are two input fields: "Request ID:" with the value "NEW" and "Environment:" which is empty. A magnifying glass icon is positioned to the right of the "Environment:" field.

Tip: Use the **Magnifying Glass** to search for values.

A screenshot of the "Look Up Environment" dialog box. The title bar says "Look Up Environment" with a close button (X). Below the title bar is a "Search by:" dropdown menu set to "Environment" and a "begins with" text box. There is a "Help" link to the right. Below these are three buttons: "Look Up", "Cancel", and "Advanced Lookup". The "Search Results" section shows a table with columns "Environment" and "Description". The table contains three rows: "CSS" (Campus Solutions), "FMS" (Financial Management System), and "HCM" (Human Resources). The "CSS" row is highlighted with a blue background. Navigation controls include "View 100", "First", "1-3 of 3", and "Last".

# CSS Instructions

- Click the **Add** button to start a new request

Security Request

Add a New Value

Request ID: NEW  
Environment: CSS

Add

- 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.

Environment CSS

\*BGSU User Name JSMITH

Tip: Search for people using the **magnifying glass**.

\*Job Coordinator  
\*Department College of Education - Admin  
\*Phone 419/372-1234

- 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.

\*BGSU User Name JSMITH \*Name  
\*BGSU ID  
\*Job  
\*Department  
\*Phone

Tip: Always enter information about the person that access is being requested for.

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

\*Effective Date 04/28/2015

Tip: The Effective Date is the earliest date the access is needed.

- Enter the **campus affiliation** for the person


\*Affiliation  
Faculty  
Other  
Staff  
Student

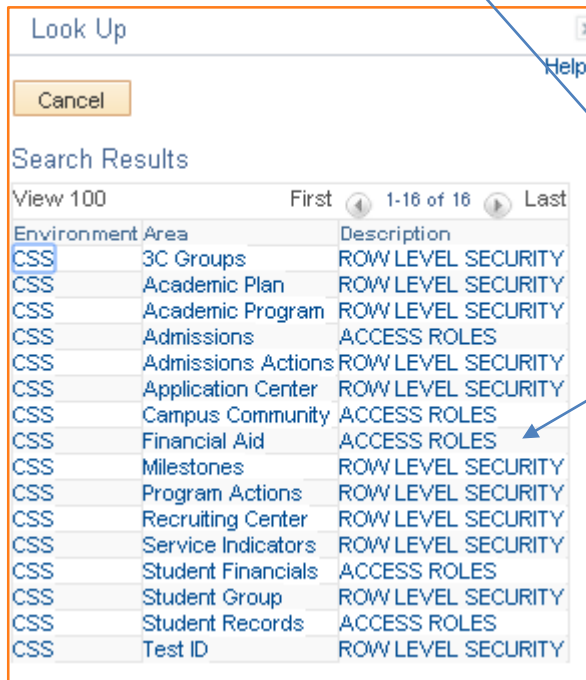
# CSS Instructions

- 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.



## 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 look up.
- Use the  icon to add additional access role functional areas as needed

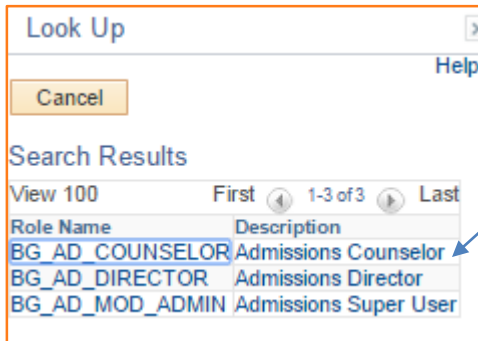
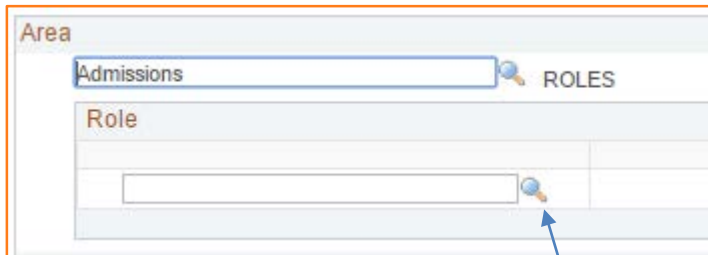


Tip: Click on the **Details** icon to see more information about the functional area

Tip: Use the **magnifying glass** to search for functional areas defined as “**ACCESS ROLES**”

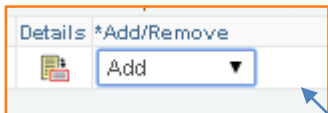
# CSS Instructions

- 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.






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

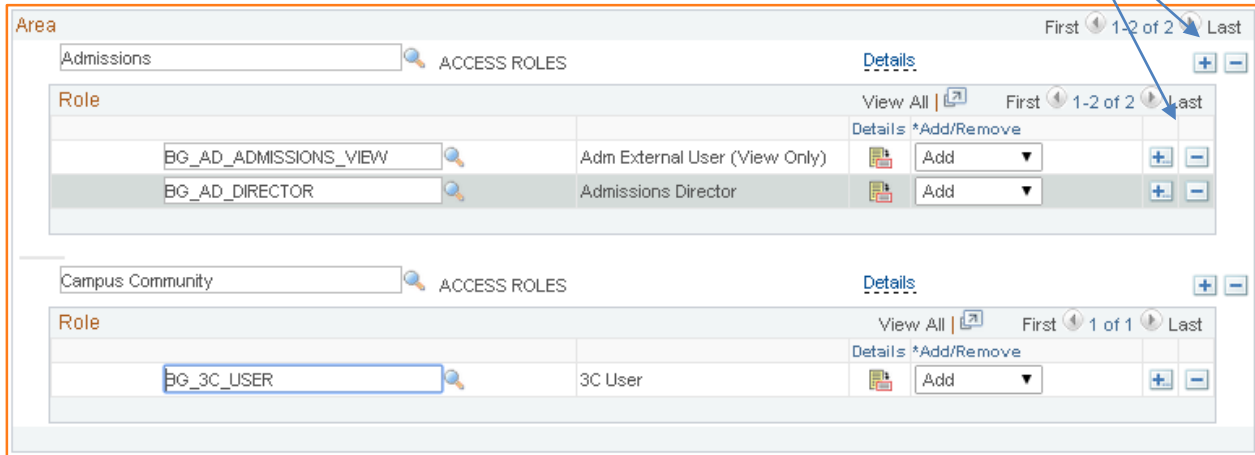
- For each role, you must indicate whether you are requesting that the role be added to or removed from your access by selecting the appropriate value from the Add/Remove drop down




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

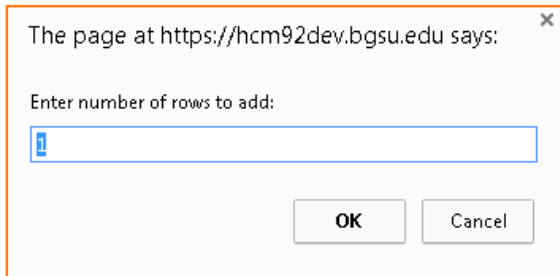
# CSS Instructions

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.



Area	Role	Details	*Add/Remove		
Admissions	BG_AD_ADMISSIONS_VIEW	Adm External User (View Only)	Add	+	-
Admissions	BG_AD_DIRECTOR	Admissions Director	Add	+	-
Campus Community	BG_3C_USER	3C User	Add	+	-

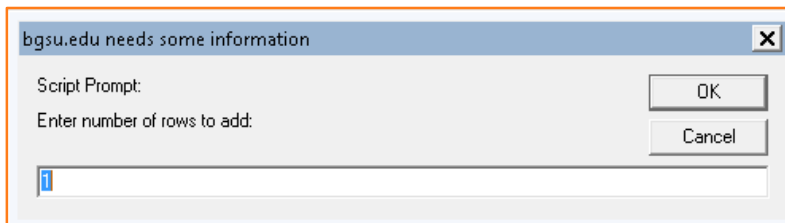
- When using the  icon, you will be prompted for the **number of rows** you wish to add.
- *The look of this prompt will vary by internet browser and you may be required to disable pop-up blockers:*



The page at <https://hcm92dev.bgsu.edu> says:

Enter number of rows to add:

OK Cancel



bgsu.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.

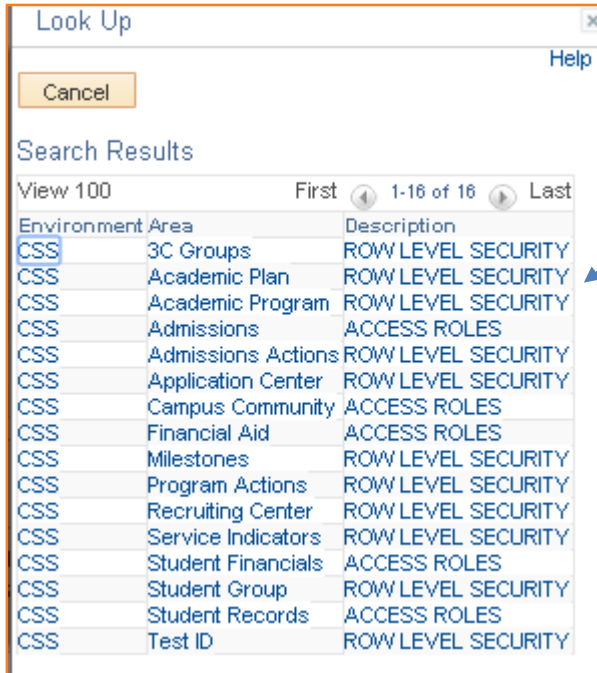
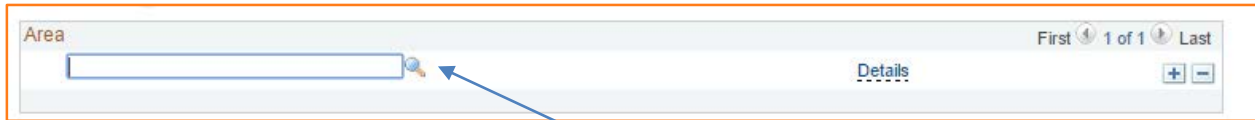
**Message**

For Role BG\_ADVISOR\_SS, the Student Group and Milestones will be added upon Submit.

# CSS Instructions

## Adding CSS Row Level Security

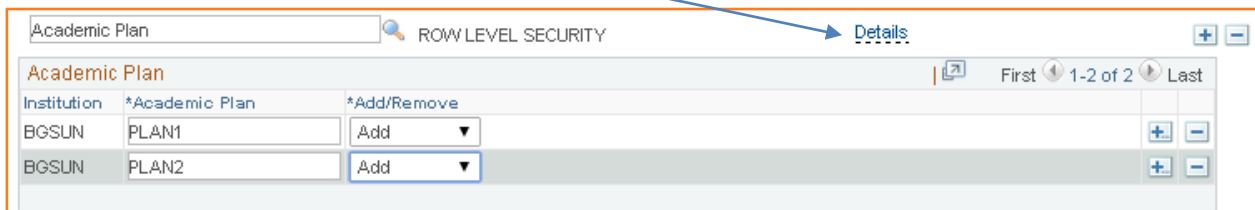
- CSS Row level security is also grouped by functional areas. Use the **magnifying glass** to search for applicable functional areas defined as “**ROW LEVEL SECURITY**”



Environment Area	Description
CSS 3C Groups	ROW LEVEL SECURITY
CSS Academic Plan	ROW LEVEL SECURITY
CSS Academic Program	ROW LEVEL SECURITY
CSS Admissions	ACCESS ROLES
CSS Admissions Actions	ROW LEVEL SECURITY
CSS Application Center	ROW LEVEL SECURITY
CSS Campus Community	ACCESS ROLES
CSS Financial Aid	ACCESS ROLES
CSS Milestones	ROW LEVEL SECURITY
CSS Program Actions	ROW LEVEL SECURITY
CSS Recruiting Center	ROW LEVEL SECURITY
CSS Service Indicators	ROW LEVEL SECURITY
CSS Student Financials	ACCESS ROLES
CSS Student Group	ROW LEVEL SECURITY
CSS Student Records	ACCESS ROLES
CSS Test ID	ROW LEVEL SECURITY

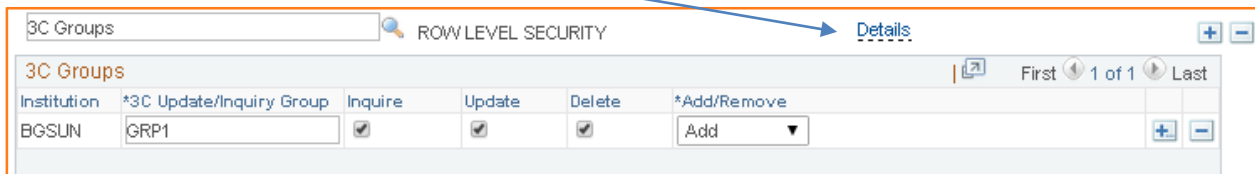
Tip: Use the **magnifying glass** to search for functional areas defined as “**ROW LEVEL SECURITY**”

- 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.**



Institution	*Academic Plan	*Add/Remove
BGSUN	PLAN1	Add
BGSUN	PLAN2	Add

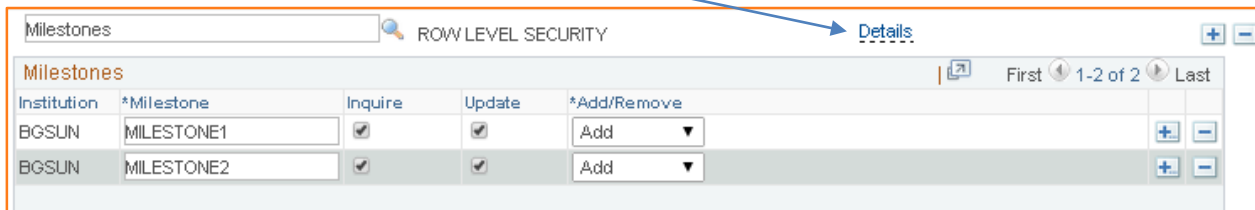
- For **3C Groups**, you will need to add the appropriate group(s), choose the level of access and select whether you are requesting the group be added or removed from your access. **Click on the Details link to see information.**



Institution	*3C Update/Inquiry Group	Inquire	Update	Delete	*Add/Remove
BGSUN	GRP1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Add

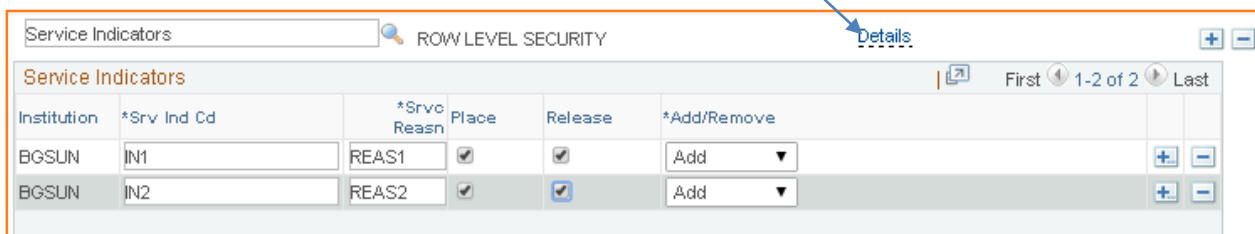
# CSS Instructions

- 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.



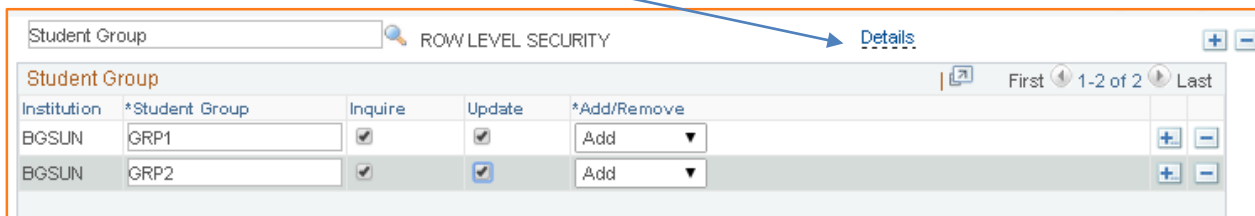
Milestones					
ROW LEVEL SECURITY					
Milestones					
Institution	*Milestone	Inquire	Update	*Add/Remove	
BGSUN	MILESTONE1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Add	+ -
BGSUN	MILESTONE2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Add	+ -

- 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					
ROW LEVEL SECURITY					
Service Indicators					
Institution	*Srv Ind Cd	*Srv Reasn	Place	Release	*Add/Remove
BGSUN	IN1	REAS1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Add
BGSUN	IN2	REAS2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Add

- 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 Group					
ROW LEVEL SECURITY					
Student Group					
Institution	*Student Group	Inquire	Update	*Add/Remove	
BGSUN	GRP1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Add	+ -
BGSUN	GRP2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Add	+ -

# CSS Instructions

- A request can include any combination of Roles and Role Level Security. Separate requests are not necessary.

The screenshot shows three sections of the CSS interface:

- Admissions:** ACCESS ROLES. Table with roles: BG\_AD\_COUNSELOR (Admissions Counselor) and BG\_AD\_DIRECTOR (Admissions Director). Both have an 'Add' button.
- Campus Community:** ACCESS ROLES. Table with role: BG\_CS\_CC\_ADD\_BIO (Add Biographical Data). Has an 'Add' button.
- Student Group:** ROWLEVEL SECURITY. Table with columns: Institution, \*Student Group, Inquire, Update, \*Add/Remove. Row: BGSUN, GRP1, [checked], [checked], Add.

- **Enter comments** if additional information about the request is warranted.

Comment

- 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.

- By completing and submitting this Security Request Form, I am reconfirming that I agree and abide by the BGSU Information Technology Policy and Bowling Green State University Code of Ethics and conduct as originally agreed to upon receiving my BGSU account.

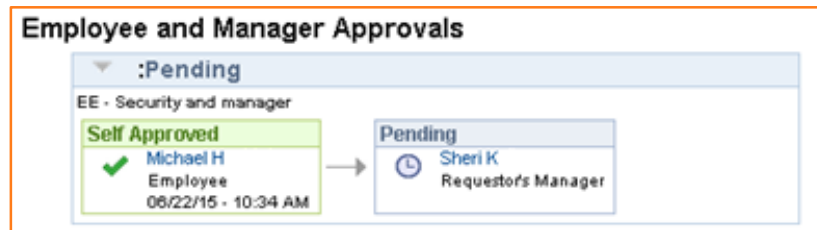
- Click on the **Submit** button to save the request and start the workflow approval process.

Submit

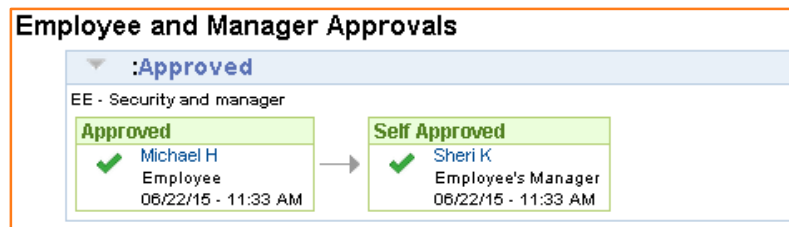


## Understanding CSS Approval Workflow

- 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



# CSS Instructions

- 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**

**:Awaiting Further Approvals**

Security - Campus Comm

**Not Routed**  
Multiple Approvers  
Campus Community Approvers

Security - Admissions

**Not Routed**  
Erin H  
Admissions Approvers

Security - Financial Aid

**Not Routed**  
Multiple Approvers  
Financial Aid Approvers

- 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**

**:Awaiting Further Approvals**

ITS Approval

**Not Routed**  
Multiple Approvers  
IT Security

## 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 is waiting on you to take action.

Mon 6/22/2015 11:23 AM  
erpno-reply@bgsu.edu  
Security Request Approval Needed

To: David P

A new PeopleSoft Security Request has been submitted and is in your queue for approval.

Environment: CSS  
Request ID: 0000000005  
Effective Date: 2015-06-22  
Name: Michael J  
Requester: David H

# CSS Instructions

- 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.

## Approve Security Request

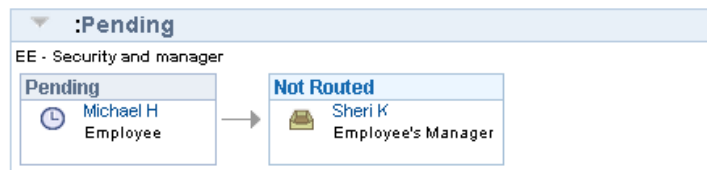
The list below contains security requests requiring your approval.

Request ID	Environment	BGSU ID	Name	Requester's BGSU ID	Requester's Name	Submitted	Workflow Status
0000000003	CSS	0000154547	Michael J	0020251200	David H	06/22/2015	In Approval Process

- 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.

- By completing and submitting this Security Request Form, I am reconfirming that I agree and abide by the BGSU Information Technology Policy and Bowling Green State University Code of Ethics and conduct as originally agreed to upon receiving my BGSU account.

## EE and Manager Approval



- 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

Approver Name

Comment

Approve Deny

- 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.

