

**CI Records Automated PSAR** 

**Process Guide** 

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# 1.0 Purpose

The PSAR (PeopleSoft Security Access Request) Process Guide outlines the functionality of the CI\_PT\_SC\_0003 modification. This includes pages to request, approve, and remove Channel Islands defined PeopleSoft security roles. Additionally this process guide provides details about the processes, configuration, notifications and workflow included in the project.

# 2.0 Overview

This document will provide an overview of the Channel Islands Automated PeopleSoft System Access Request modification. This modification includes PeopleSoft Page based components for the requesting and approval of PeopleSoft security, as well as Page based components for review and removal of PeopleSoft security. Workflow notifications are handled through campus email (using the employee domain addresses configured in PeopleSoft) and occur at the time of a request as well as nightly based on configuration thresholds. Assignment of security in PeopleSoft delivered components is predicated off of the transactions entered, approved, or removed in the PSAR request pages. Security assignment occurs 3 times each business day. The Automated PSAR project also provides process-based functionality for creating dynamic role queries, mass notification and automated removal of denied/expired requests.

Manager Nofication Nightly No Request Notified Notifications Threshold Action Removed Sent Reached? Security Lead Approval Request Submitted Security Assigned Approved Notified Status Data Owne Requestor Notified/ Deniec Request Removed Notified

The following represents the process flow for new PSAR transactions:

The scope of Automated PSAR processing utilizes the following PeopleSoft objects and process flow:



# 2.1 Roles & Responsibilities

*Requester* – A requestor is defined as a CI Records user, who initiates individual PSAR transactions. Requestors may also fulfill any of the other roles outlined in this section based on their relationship to the campus. Requestors are responsible for determining and/or coordinating an appropriate link between CI Records users requiring new access and the roles containing that access, during the request submission process.

*MPP Manager* - Manager is defined as an individual whose responsibility is assigning and managing administrative and operational duties. This individual is classified as Management Personnel in HR (MPP). Managers are responsible for approving PSAR requests on behalf of appropriate employees.

*Security Lead* – Security Lead is defined as an individual who has been delegated by a Data Owner as the individual responsible for the creation, review, request and approval of the various PeopleSoft security components (including but not limited to profiles, roles, permission lists, and query security). Security Leads are responsible for approving PSAR requests that contain the security components delegated as their responsibility.

*Data Owner* - Data Owner (also known as Data Steward) is defined as an individual who has been delegated with the following responsibilities within their delegated area of ownership/stewardship:

- 1. Classification of information assets according to the campus Data Classification Standard.
- 2. Define security requirements proportionate to the value of information assets within delegated area.
- 3. Management of delegated information assets according to the requirements described in the campus Information Asset Management Standard and the CSU Records Retention Schedule for their delegated area.

Data Owners are responsible for approving requests that contain data and/or components under their stewardship.

*Approver* – An approver is a general term for anyone who fulfills the role of a MPP Manager, Security Lead, and/or Data Owner for the campus.

# 2.2 Security Considerations

This section lists all security considerations for the process

**Page Security** – Appropriate page security will be required to access the request and configuration pages. One set of security will be created for PSAR approvers to make and approve request, another will be created for the Campus PeopleSoft Security Administrator(s).

**Process Security** – Appropriate process security will be required to run the processes.

# **3.0 PSAR Requests and Approvals**

This section will walk through the process of making and approving a PSAR request in CI Records. PSAR requests and their associated approvals drive the assignment of CI Records security. Fully approved requests are translated into security assignments **three** times each business day.

### **3.1 Creating a PSAR Request**

Navigation: Main Menu > CI Customization / Interfaces > CI Security > PSAR Request

Favorites	Main Men	u 🔹 > Cl Customizatio	ns / Interfaces = > CI Security = >	PSAR Request
ORAC	LE.			
PSAR Req	uest			
Enter any info	rmation you hav	e and click Search. Leave	fields blank for a list of all values.	
Find an Ex	isting Value			
	Criteria			
User ID:	begins with <b>v</b>	princess.leia		
Empl ID:	begins with 🔻		]	
Last Name:	begins with <b>•</b>	Leia	]	
First Name:	begins with 🔻	Princess	]	
Name:	begins with 🔻			
Case Sen	sitive			
Search	ClearBa	asic Search 📳 Save Sea	rch Criteria	
Search Res	sults			
View All		First 💽 1 of 1 📡	Last	
User ID	Empl ID Last	Name First Name Name		
princess.leia	001539435 LEIA	PRINCESS Leia, Prin	icess	

- 1. **Enter** in search criteria at the Find an Existing Value
- 2. Click Search Search
- 3. Select the Employee from the Search Results section if prompted

Note: Only campus employees who have a CMS Compliance Form on file will appear in the search results. The CMS Compliance Form is provided by Human Resources during the hiring process and requires both the employees and appropriate manager's signature. More information can be found here: <a href="http://www.csuci.edu/hr/hr\_documents/cms-complianceaccess-form-oct2012.pdf">http://www.csuci.edu/hr/hr\_documents/cms-complianceaccess-form-oct2012.pdf</a>

					Persona	alize   Find   Vie	w All   🖾   🛗 🛛 Fii	rst 🔳 1-3 of 3 膨 Las
PS System	*Role Name	*MPP Approved	МРР	*Data Owner Approved	Data Owner	*Security Lead Approved	Security Lead	Request Date/Time
1 HCM	CI PT Query Staff	Pending	Solo,Han	Pending	Skywalker,Luke	Pending	Skywalker,Luke	07/18/14 12:41PM
2 HCM	CI PT Sec SF Row	Pending	Solo,Han	Pending	Skywalker,Luke	Pending	Skywalker,Luke	07/12/14 8:12PM
3 HCM	Q	Requesting	Solo,Han	Requesting		Requesting		08/06/14 2:51PM
3								

4. **Click** the add a row icon  $\blacksquare$ 

*Role Name	
CI PT Query Staff	
CI PT	Q

- 5. **Enter** all or some of the Role Name in the Role Name field, if possible. Otherwise proceed to the next step.
- 6. Click the search icon  $\bigcirc$  on the Role Name column

Look Up R	ole Name		×
Role Name:	begins with ▼	CI PT	Help
Look Up	Clear	Cancel Basic Lookup	
Search Res	ults		
View 100		First 👔 1-17 of 17 🕟 La	ast
Role Name		Description	
CI PT AM Pro	d Ctrl	CI PT AM Prod Ctrl	
CI PT Admin I	Dev	CI PT Admin Dev	

7. Click the Role Name you would like to request

PS System	*Role Name	*MPP Approved	мрр	*Data Owner Approved	Data Owner	*Security Lead Approved	Security Lead	Request Date/Time
1 HCM	CI PT Query Staff	Pending	Solo,Han	Pending	Skywalker,Luke	Pending	Skywalker,Luke	07/18/14 12:41PM
2 HCM	CI PT Sec SF Row	Pending	Solo,Han	Pending	Skywalker,Luke	Pending	Skywalker,Luke	07/12/14 8:12F
3 HCM	CI PT Security Lead	Requesting	g Solo,Han	Requesting	Skywalker,Luke	Requesting	Skywalker,Luke	08/06/14 2:51F
De Definitio	Return to Search							

# **3.2 Deleting a PSAR Request**

Deletion of PSAR request results in either the prevention of CI Records assignment (if the request is not yet fully approved) or the removal of existing CI Records security.

Navigation: Main Menu > CI Customization / Interfaces > CI Security > PSAR Delete

Favorites	Main Men	u - > CI Customizations / Interfaces - > CI Security - > PSAR Delete
ORAC	LE.	
DOAD Dale		
PSAR Dele	ete	
Enter any info	rmation you hav	e and click Search. Leave fields blank for a list of all values.
Find an Ex	cisting Value	
Search (	Criteria	
User ID:	begins with 🔻	princess.liea
Empl ID:	begins with 🔻	
Last Name:	begins with 🔻	Princess
First Name:	begins with 🔻	Leia
Name:	begins with 🔻	
Search	Clear Ba	asic Search 🔲 Save Search Criteria
Search Doc	ulte	
View All	Juito	First i at i act
View All	Concelling 1	
princess.leia	001539435 LEIA	A PRINCESS Leia.Princess

- 1. **Enter** in search criteria at the Find an Existing Value
- 2. Click Search Search
- 3. Select the Employee from the Search Results section if provided the option

Note: Only campus employees who have a CMS Compliance Form on file appear in the search results. The CMS Compliance Form is provided by Human Resources during the hiring process and requires both the employees and appropriate manager's signature. More information can be found here: <a href="http://www.csuci.edu/hr/hr\_documents/cms-complianceaccess-form-oct2012.pdf">http://www.csuci.edu/hr/hr\_documents/cms-complianceaccess-form-oct2012.pdf</a>

C	
Security Lead	Request Date/Tim
Skywalker,Luke	07/10/14 4:20PM
Skywalker,Luke	07/18/14 12:41PM
Skywalker,Luke	07/12/14 8:12PM
	Skywalker,Luke Skywalker,Luke Skywalker,Luke

4. Click Remove icon next to the role you want removed.

Delete Confirmation	
Delete current/selected rows from this page? The delete will occur when the t	ransaction is saved.
	K Cancel

5. **Click** OK when the dialog box appears.

	•••••					Persor	nalize   Find   Vi	iew All   🖾   🛗 🛛 F	irst 🖪 1-2 of 2 🕨 Las
	PS System	Role Name	MPP Approved	МРР	Data Owner Approved	Data Owner	Security Lead Approved	Security Lead	Request Date/Tim
1 💻	HCM	CI PT Query Staff	Pending	Skywalker,Luke	Pending	Skywalker,Luke	Pending	Skywalker,Luke	07/10/14 4:20PM
2 -	HCM	CI PT Query Staff	Pending	Solo,Han	Pending	Skywalker,Luke	Pending	Skywalker,Luke	07/18/14 12:41P

6. Click Save when you are returned to the page and have finished removing requests.

## **3.3** View Existing Security

Viewing existing security provides a full picture of users with CI Records existing security. *Navigation: Main Menu > CI Customization / Interfaces > CI Security > PSAR Existing Security* 

Favorites	Main Menu	u 🔹 > Cl Customizati	ons / Interfaces 🝷	> CI Security	> PSAR Existing Security
	LE.				
PSAR Exis	ting Security	<b>y</b> e and click Search. Leav	ve fields blank for a li	ist of all values.	
Find an Ex	tisting Value				
	Criteria				
User ID: Empl ID: Last Name: First Name: Name:	begins with V begins with V begins with V begins with V	princess.leia Leia Princess			
Search Search Res	Clear Ba	isic Search 📳 Save S	earch Criteria		
View All		First 💽 1 of 1	Last		
User ID I princess.leia	Empl ID Last 001539435 LEIA	Name First Name Name PRINCESS Leia, F	Princess		

- 1. Enter in search criteria at the Find an Existing Value
- 2. Click Search Search
- 3. Select the Employee from the Search Results section if provided the option

Note: Only campus employees who have a CMS Compliance Form on file appear in the search results. The CMS Compliance Form is provided by Human Resources during the hiring process and requires both the employees and appropriate manager's signature. More information can be found here: http://www.csuci.edu/hr/hr\_documents/cms-complianceaccess-form-oct2012.pdf

00		lation						
Em	pl ID 001	1539435 Leia,Princ	ess					
Us	er ID prir	icess.leia	Title Mg	r. of Application Services				
$\bigtriangledown$	User ID S	Specific Security		Personalize   Find   💷   🔠 🛛 First 🔳 1 of 1 💌 Las				
	PS System	Primary Permission List	Row Security Permission List	Process Profile Perm. List				
1		PPSTAFF	DP_DUAL_TC	CI_PROCESS_PROFILE_USER				
	Existing I	Role Access	F	Personalize   Find   💷   🔠 🛛 First 🖪 1-14 of 14 💌 Las				
	PS System	Role Name		Description				
1		CI CMS Testing		CI CMS Testing				
2		CI HR AM Employee		CI HR AM Employee				
3		CI HR AM Manager		CI HR AM Manager				
4		CI HR TL Manager		CI HR TL Manager				
5		CI PT Query Staff		Query Role for Staff				
6		CI PT Report		CI PT Report				
7		CI SC PSAR Reques	tor	CI SC PSAR Requestor				
8		CI Shared Base		CI_SHARED_BASE				
9		CI Shared Base Supp	port	CI Shared Base Support:				
10		CI Super View		CI Super View Access				
11		CI UTL NoPassReset		CI UTL NoPassReset				
12		HCM SOA Services F	Portal Access	HCM SOA Services Portal Access				
13		PeopleSoft User		PeopleSoft User				
14		ReportDistAdmin		Report Distribution Admin				

# 4.0 **PSAR Notifications**

The CI Records PSAR Automation project provides an approval workflow framework using campus email addresses. These notifications are triggered by the CI Records PSAR request page (section 3.1) and the scheduled nightly processes. This section will explain the types of notifications generated by the Automated PSAR modification and when they are sent.

# 4.1 New PeopleSoft System Access Requests for...

New system PSAR requests require three levels of approval: MPP Manager of the employee, Security Lead associated to the role, and Data Owner associated to the role. For typical Automated PSAR requests, the requester does not fulfill each of these roles. Therefore at the time of request submission (see Section 3.1) an email is sent directly to each approver who does fulfill any of the three roles the requestor does not. There is no order precedence for approval for PSAR requests; therefore emails go out to all approvers who have pending action on the request immediately.

The subject of a New PeopleSoft System Access Requests email will indicate to the approver that a new request for a particular employee requires their attention. The body of the email contains: the name of the requestor, the date of the request, the name of the employee for whom the security is being requested, the emplid of the employee for whom the security is being requested for the employee, and a link into CI Records where the request can be approved (MyCI login may be necessary).

```
      Subject:
      New PeopleSoft System Access Request for Princess Leia

      A PeopleSoft System Access Request was created by Luke Skywalker on 2014-07-19. The request consists of:

      Name:
      Princess Leia

      Emplid:
      001539435

      Role:
      CI PT Sec SF Row

      Please provide approval at:
      https://cmsdev3.calstate.edu/psp/HACITST/EMPLOYEE/HRMS/c/CI_SC_CUSTOM.CI_PSAR_REQ.GBL?Page=CI_PSAR_REQ&Action=U&EMPLID=001539435
```

# 4.2 PeopleSoft System Access Request Denied for ...

If an approver should determine that an Automated PSAR request cannot be approved, they have the ability to deny approval on the PSAR request page. When a request is denied an email is sent to the original requester.

The PeopleSoft System Access Denial email subject indicates to the requester that a request they submitted on behalf of a particular employee has been denied. The body of the email contains the name of the approver who denied the request, the employee name, the employee ID, the role requested, and the date of the original request.

```
      Subject:
      PeopleSoft System Access Request Denied for Princess Leia

      Han Solo has denied the following PeopleSoft System Access Request:

      Employee:
      Princess Leia

      Emplid:
      999000999

      Role:
      CI AA Faculty Pgrm Adv Staff

      Submitted:
      2014-07-14

      Denied requests are removed nightly.
```

Note: Denied requests are purged nightly. If you receive a denial notification and feel it is in error – **contact the approver immediately**. The approver can change their approval status within the same business day.

# 4.3 PeopleSoft System Access Reminder

When outstanding PSAR requests are left in a pending status by approvers, CI Records security is not assigned. Likewise, the Automated PSAR modification only sends one initial notice to approvers for each unique PSAR request. As a reminder to approvers who have unaddressed and outstanding requests that require attention, the Automated PSAR modification sends out nightly reminder emails. Configuration for the modification includes a threshold value for outstanding requests. When an approver has one or more outstanding requests that have passed the threshold the PSAR modification begins sending the nightly reminder emails.

The PeopleSoft System Access Requests Reminder email subject notifies approvers that they have request requiring attention. The threshold value and outstanding requests for each function the approver servers are include in the body of the email. The employee name, employee ID, role name, and original request date of each outstanding request are also included.

Subject:	PeopleSoft System Access Request Reminder
The follo	owing CI Records PSAR requests have been pending your review for 7 days or longer.
MPP Ma	angager requests outstanding:
EMPLOY	(EE: Princess Leia (001539435), ROLE: CI PT Query Staff, REQUEST DATE: 10-07-2014
Data Ow	vner requests outstanding:
EMPLOY	(EE: Princess Leia (001539435), ROLE: CI PT Query Staff, REQUEST DATE: 10-07-2014
EMPLOY	(EE: Princess Leia (001539435), ROLE: CI PT Sec SF Row, REQUEST DATE: 12-07-2014
Socurity	Lead requests outstanding:
Security	Lead requests outstanding.
EMPLOY	(EE: Princess Leia (001539435), ROLE: CI PT Query Staff, REQUEST DATE: 10-07-2014
EMPLOY	(EE: Princess Leia (001539435), ROLE: CI PT Sec SF Row, REQUEST DATE: 12-07-2014

# 4.4 PeopleSoft System Access Request Expiration

Similar to the reminder threshold described in the previous section, the Automatic PSAR modification has an expiration threshold. If an approver has not addressed outstanding requests by the threshold days after the original request date, a PSAR request is removed from CI Records and the original requester is notified.

The PeopleSoft System Access Request Expiration notification includes a descriptive subject and the fields describing each expiring request including: the employee name, employee ID, role name, request date, mpp manager name, mpp manager approval status, data owner name, data owner approval status, security lead name, and security lead status.

Subject:	PeopleSoft System Access Request Expiration								
The following CI Records PSAR request(s) have not been approved in the maximum 14 days									
EMPLOYEE: Princess Leia (999000000)									
ROLE: CI S	R Health Center Staff								
REQUEST	DATE: 03-07-2014								
MANAGE	R: Luke Skywalker STATUS: A								
DATA OW	NER: Darth Vader STATUS: P								
SECURITY	LEAD: Bobba Fett STATUS: P								
EMPLOYE	E: Princess Leia (999000000)								
ROLE: CI H	IR TL Manager								
REQUEST	DATE: 03-07-2014								
MANAGE	R: Luke Skywalker STATUS: A								
DATA OW	NER: Han Solo STATUS: P								
SECURITY	LEAD: Chewbacca STATUS: P								

# 5.0 **PSAR** Configuration

This section will walk through the process of configuring the Automatic PSAR modification. Each section outlined is crucial for the effective operation of the Automate PSAR modification. Data Owner and Security Lead associations to roles enable the notification and approval structure of the modification. The Excluded Roles component allows Data Owners and Security Leads to opt out certain roles of the Automated PSAR request process. Finally, the Misc Configuration tab handles the setup and storage of all other modification required values.

# 5.1 Define Data Owners to Role Relationships

#### Navigation: CI Customization / Interfaces > CI Security > PSAR Configuration > Data Owner to Roles (tab)

This page links subsets of custom CI security roles to the appropriate Data Owners. Roles are grouped by using the campus role naming convention and a wild card operator '%'. Alternate approvers can be configured and the assignments adhere to effective dated logic.

Favorites  Main Menu  Cl Customizations / Interfaces  Cl Se	cun	ity  > PSAR Configuration	
ORACLE <sup>®</sup>			
Data Owner to Roles Security Lead to Roles Excluded Roles Misc Co	onfigi	uration	
*Effective Date *Data Owner		Personalize	Find   🔄   🔠 First 🖪 1-4 of 4 🕨 Last Role Name
1 🛨 🖃 06/02/2014 🛐 test.user1	Q	test.user4	CI HR%
2 🛨 🗕 06/02/2014 🛐 test.user2	Q	test.user3	CI SR%
3 🛨 🗕 06/02/2014 🛐 test.user3	Q	test.user2	CI PT%
4 🛨 🗖 06/11/2014 🛐 test.user4	Q	test.user1	CI FA%
Save Notify Data Owner to Roles   Security Lead to Roles   Excluded Roles   Misc Configuration			

1.  $\blacksquare$  Add a new row.



2. **Enter** an Effective Date 1 (or continue with the default value).

\*Data Owner test.user1

3. Enter a Data Owner's User ID and skip the next two steps, or click search  $\bigcirc$ 

Look Up Data Owner					
Search by:	Help				
Look Up	Cancel	Advanced Loo	kup		
Search Res	suits				
View 100	First 💽	1 of 1 🝺 Last			
User ID	Empl ID	Name			
princess.leia	001539435	Leia,Princess			

- 4. Enter a Data Owner's User ID, the Look Up button Look Up will bring up a listing of all matching values (or all values if the field is left blank)
- 5. **Click** the User ID of the Data Owner.

Alternate	
test.user3	Q

6. If requested by the Data Owner, **Enter** an Alternate User ID and skip the next two steps, or **click** search

Look Up A	lernate			×
Search by:	User ID be	egins with princ	ess.l	Help
Look Up	Cancel	Advanced Loo	kup	
Searchikes	suits			
View 100	First 💽	1 of 1 ず Last		
User ID	Empl ID	Name		
princess.leia	001539435	Leia,Princess		

- 7. Enter an Alternate's User ID, the Look Up button will bring up a listing of all matching values (or all values if the field is left blank)
- 8. **Click** the User ID of the Alternate.

Role Name	
CI AD%	

- 9. Enter as role name descriptor, with the '%' wild card symbol if needed
- 10. Click Save

# 5.2 Define Security Leads to Role Relationships

# Navigation: CI Customization / Interfaces > CI Security > PSAR Configuration > Security Lead to Roles (tab)

This page links subsets of custom CI security roles to the appropriate Security Lead. Roles are grouped by using the campus role naming convention and a wild card operator '%'. Alternate approvers can be configured and the assignments adhere to effective dated logic.

Fa	rori	tes	Main	Menu → CI (	Customizat	ions / Interfaces 🝷	> CI Sec	curi	ity = > PSAR Configura	tion		
Da	ta	Owr	ner to Roles	Security Lead	to Roles	Excluded Roles	Misc Cor	nfig	uration			
										Personalize   F	Find   🖾   🛗	First 🔳 1-3 of 3 🕨 Last
			*Effective Dat	te	*Security Le	ad			Alternate		Role Name	
1	H	-	06/02/2014	) H	test.user1			Q	test.user3	Q	CI HR%	
2 💽	F	-	06/02/2014	31	test.user2			a	test.user2	Q	CI SR%	
3 -	F	-	06/11/2014	31	test.user3			Q	test.user1	Q	CI PT%	
Data	Sa	ave wne	r to Roles   Se	ecurity Lead to Ro	les   Exclud	ed Roles   Misc Conf	iguration					

1.  $\blacksquare$  Add a new row.

Calendar 🛛 🗙											
	Jun	June 🔻 2014									
	S M		Т	W	Т	F	S				
	1 2		3	4	56		7				
	89		10	11	12	13	14				
	15	16	17	18	19	20	21				
	22 23		24	25	26	27	28				
	29	30									
			Curr	ent D	Date						
						0					

2. Enter an Effective Date 1 (or continue with the default value).

*Security Lead	
test.user1	Q

3. Enter a Security Leads User ID and skip the next two steps, or click search  $\bigcirc$ 

Look Up S	ecurity Le	ad		×		
Search by:	User ID be	egins with princ	ess.l	Help		
Look Up	Look Up Cancel Advanced Lookup					
Search Res	suits					
View 100	First 🔳	1 of 1 🕞 Last				
User ID	Empl ID	Name				
princess.leia	001539435	Leia,Princess				

- 4. Enter a Security Lead's operator ID, the Look Up button will bring up a listing of all matching values (or all values if the field is left blank)
- 5. Click the User ID of the Security Lead.

Alternate	
test.user3	Q

6. If requested by the Security Lead, **Enter** an Alternate User ID and skip the next two steps, or **click** search

Look Up A	lernate			×	
Search by:	User ID be	egins with princ	ess.l	Help	
Look Up	Look Up Cancel Advanced Lookup				
0001011100	Janeo				
View 100	First 🔳	1 of 1 🕟 Last			
User ID	Empl ID	Name			
princess.leia	001539435	Leia,Princess			

- 7. Enter an Alternate's operator ID, the Look Up button Look Up will bring up a listing of all matching values (or all values if the field is left blank)
- 8. **Click** the User ID of the Alternate.

Role Name	
CI AD%	

9. Enter as role name descriptor, with the '%' wild card symbol where needed

10.	Click Save	🔡 Save
10.	Chieff Sure	

# 5.3 Define Roles Excluded from PSAR Processing

# Navigation: CI Customization / Interfaces > CI Security > PSAR Configuration > Excluded Roles (tab)

This page lists roles that need to be excluded from automatic PSAR processing.

ata	Owr	ner to	Roles Security Lead to Roles	Exclud	ed Roles	Misc Configura	ition	
Ro Pro	les oces	Excl	uded from PSAR	Pe	rsonalize   F	Find   🖾   🛗	First 🛃 1-8 of 8 🕨 Las	
			*Role Name		Description			
1	+	-	CI HR AM Employee	Q CI HR AM Employee				
2	+	-	CI HR TL Employee	Q	Q CI HR TL Employee			
3	+	-	CI SS Academic Advising	Q	CI SS Acad	demic Advising		
4	+	-	CI SS Alumni	Q	Q CI SS Alumni			
5	+	-	CI SS Applicant	Q	Q CI SS Applicant			
6	+	-	CI SS Extended Learning	Q	Self Service	e - Ext Learning		
7	+	-	CI SS Faculty	Q	Q Self Service - Faculty			
8	+	-	CI SS Student	Q	Q Self Service - Student			

1. **• Add** a new row.

Look Up R	ole Name						X
Role Name:	begins with	▼ CI	PT			Hel	р
Look Up	Clear	Can	icel	Basic	Lookup		
Searchikes	uits						
View 100				First 🛛	1-17 of 17	Last	
Role Name			Desc	ription			
CI PT AM Prod Ctrl CI PT AM Prod Ctrl							
CI PT Admin Dev CI PT Admin Dev							

2. Search and select a Role Name in dialog box

3. Click Save Save

# 5.4 Define Miscellaneous Configuration from PSAR Processing

# Navigation: CI Customization / Interfaces > CI Security > PSAR Configuration > Misc Configuration (tab)

This page defines several required configuration values for the PSAR modifications. These include workflow notification thresholds and email notification Templates.

Favorites - Main Menu - > CI Customizations / Interfaces - > CI Security - > PSAR Configura
ORACLE
Data Owner to Roles Security Lead to Roles Excluded Roles Misc Configuration
Pending Notification Thresholds
*Days Pending Before Mass Notification 7 Days Pending Before Deletion 14
Email Notification Templates
New Request Requires Approval CI_PSAR_Notify_Approver
Request Was Denied CI_PSAR_Denial_Notify
Nightly Mass Notifications CI_PSAR_Mass_Notify
Request Expiration Notification CI_PSAR_Expire_Notify
Save 🖂 Notify
Data Owner to Roles   Security Lead to Roles   Excluded Roles   Misc Configuration
1. <b>Enter</b> an Integer value for the <i>Days Pending Before Mass Notification</i> field
2. Enter an Integer value for the <i>Days Pending Before Deletion</i> field
Look Up New Request Requires Approval
Help
Search by: Template Name begins with CI
Look Up Cancel Advanced Lookup

 Template Name
 Description

 CL\_PSAR\_Denial\_Notify
 PSAR Denial Notification

 CL\_PSAR\_Expire\_Notify
 PSAR Expiration Notification

 CL\_PSAR\_Mass\_Notify
 PSAR Mass Notification

 CL\_PSAR\_Notify\_Approver PSAR Approver Notification

 CL\_PSAR\_Notify\_Approver PSAR Approver Notification

 3.
 Search and Select a template for New Request Requires Approval

- 4. Search and Select a template for *Request Was Denied*
- 5. Search and Select a template for *Nightly Mass Notifications*

First 🔳 1-4 of 4 🛐 Last

- 6. Search and Select a template for *Request Expiration Notification*
- 7. Click Save

Search Results View 100

# 6.0 PSAR Processes

This section will walk through running the two processes included in the Automated PSAR modification. The CISC0003 SQR Process creates dynamic role queries for appropriate CI Records security roles – it is a Scheduled process run nightly by the system and not a user run process. The CISC0003 Application Engine process sends notification emails for unaddressed PSAR requests and removes denied requests – it is a Scheduled process run nightly by the system and not a user run process.

## 6.1 Define a Run Control – (One Time Step)

This step is only done once, subsequent process runs can be started at section 6.2. Navigation: CI Customization / Interfaces > CI Security > PSAR Processes > Add a New Value (tab)

Favorites - Main Menu - > CI Customizations / Interfaces - > CI Security - > PSAR Processes
ORACLE
PSAR Processes
Eind an Existing Value Add a New Value
Run Control ID: PSAR_Processing
Add
Find an Existing Value Add a New Value

- 1. Select the Add a New Value upon your first visit to the Page
- 2. Enter a Run Control ID
- 3. Click Add

# 6.2 Open an existing Run Control

Navigation: CI Customization / Interfaces > CI Security > PSAR Processes > Find an Existing Value (tab)

Favorites - Main Menu - > CI Customizations / Interfaces -> CI Security > PSAR Processes
ORACLE'
PSAR Processes
Enter any information you have and click Search. Leave fields blank for a list of all values.
Find an Existing Value Add a New Value
I Search Criteria
Search by: Run Control ID begins with PSAR_P
Search Advanced Search
Search Results
View All First 1 of 1 Last
PSAR_process English
Find an Existing Value Add a New Value

- 1. **Enter** all or part of a previously setup Run Control ID
- 2. **Select** the Run Control ID from the Search Results if they appear

#### 6.3 **Run the Notification and Purge Process**

Navigation: CI Customization / Interfaces > CI Security > PSAR Processes > CI PSAR Processes (tab)

CI PSAR Processes				
Run Control ID:	PSAR_process	Report Manager	Process Monitor	Run
🗐 Save 🛛 🔒 Return	n to Search 🔚	Notify		🛃 Add 🖉 Update/Display

After the Run Control is Selected (see Section 6.2), Click **Run** 1.

User ID: shawn.bochat961		Run Control ID:	PSAR_proc	cess	
Server Name:	• Run Date: 08	8/06/2014			
Recurrence:	▼ Run Time: 4:	24:35PM	Reset to (	Current Date/Tim	е
Time Zone: 🔍					
rocess List					
lect Description	Process Name	Process Type	*Type	*Format	Distribution
PSAR Notify & Purge	CISC0003	Application Engine	Web	▼ TXT	<ul> <li>Distribution</li> </ul>
PSAR Query Creation	CISC0003	SQR Process	Web	▼ PDF	<ul> <li>Distributior</li> </ul>
,	0.000000				

- The Type value should be **Web** and the Format value should be **TXT** 3.
- Click OK OK 4.

# 6.4 Run the Create Queries Process

Navigation: CI Customization / Interfaces > CI Security > PSAR Processes > CI PSAR Processes (tab)

CI PSAR Processes				
Run Control ID:	PSAR_process	Report Manager	Process Monitor	Run
🗐 Save 🛛 🔍 Return	n to Search 📔	Notify		🗜 Add 🖉 Update/Display

# 1. After the Run Control is Selected (see Section 6.2), Click **Run**

	User ID: shawn.bochat961		Run Control ID:	PSAR_proces	SS	
S	erver Name:	Run Date: 08/	06/2014			
	Recurrence:	Run Time: 4:2	4:35PM	Reset to Cu	rrent Date/Time	
	Time Zone:					
roce	ss List					
elect	Description	Process Name	Process Type	*Type	*Format	Distribution
	PSAR Notify & Purge	CISC0003	Application Engine	Web	TXT •	Distribution
•	PSAR Query Creation	CISC0003	SQR Process	Web	PDF •	Distribution
OK	Cancol					

- 3. The Type value should be **Web** and the Format value should be **PDF**
- 4. Click OK OK

## 6.5 Viewing or Retrieving Process Output

# Navigation: CI Customization / Interfaces > CI Security > PSAR Processes > CI PSAR Processes (tab) > Process Monitor (link)

After running either the CISC003 SQR Process (PSAR Query Creation) or the CISC0003 Application Engine Process (PSAR Notify & Purge) from the run control page (Section 6.2 through 6.4) a Process Instance number is displayed on the page.

Proce	ss List	<u>S</u> er	ver List							
View F	Process A	Reque	est For							
U 9	lser ID sh Server	awn.t	oochatg Q T	Type Name		<ul> <li>▼ Last</li> <li>○ Instance</li> </ul>	1 Days     to	¥	Refresh	
Run	Status		¥	Distribution	n Status	¥	Save On Refresh			
Proce	ess List						Personalize   Find   View All	신 🎽	First 💶 1 of 1	🗈 Last
Select	Instance	Seq.	Process Typ	pe	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
	755096		Application	Engine	CISC0003	shawn.bochat961	07/22/2014 5:39:09PM PDT	Queued	N/A	Details
Go bac B Sa Process	k to PSAF ve 🖭	R Proc Notify	esses •							

- 1. Click the Process Monitor link after running the Reports To Maintenance Process OR navigate to: *PeopleTools > Process Scheduler > Process Monitor*
- 2. Click the Details link Details in the row that matches your process instance number in the Process List section of the page.

Process Detail					
Process					
Instance 755096 Name CISC0003	Type Application Engine Description PSAR Notify & Purge				
Run	Update Process				
Run Control ID PSAR_process Location Server Server Recurrence	<ul> <li>Hold Request</li> <li>Queue Request</li> <li>Cancel Request</li> <li>Delete Request</li> <li>Restart Request</li> </ul>				
Date/Time	Actions				
Request Created On 07/22/2014 5:40:05PM PDT Run Anytime After 07/22/2014 5:39:09PM PDT Began Process At Ended Process At	Parameters Transfer Message Log View Locks Batch Timings View Log/Trace				
OK Cancel					

3. **Click** the View Log/Trace link under the Action section for the Process Detail page for the CISC0003 process

View Log/	Trace						
Report							
Report ID:	215759	Process In	stance:	755096		Message Log	
Name:	CISC0003	Process Ty	pe:	Application	Engine		
Run Status:	Success						
PSAR Notify	& Purge						
Distribution	n Details						
Distributio	n Node: HACITST	Ex	piration	Date: 09	/05/2014		
File List							
Name			File Size	e (bytes)	Datetime Cr	eated	
AE_CISC000	03_755096.log		201		07/22/2014	5:40:34.915784PN	1 PDT
CISC003.bd			1,246		07/22/2014	5:40:34.915784PN	1 PDT
Distribute To	D						
Distribution ID Type	*Distribution ID						
User	shawn.bochat961						
Return	shawn.bochat961						

4. **Click** the link Under *Name* for the file you need in the File List section.

# Appendix A – Troubleshooting

This section lists commonly asked questions to resolve access problems.

# **Appendix B – Documentation Resources**

This section lists documentation in addition to this guide that will help with understanding the various aspects of the PeopleSoft System.

### **CI Functional Documentation**

Each area keeps some version of functional documentation. Functional documentation will help explain how data is input and updated as part of the normal business process. No centralized documentation currently exists for all functional documentation at CSUCI. Contact the Module Lead in each area for assistance in understanding the data.

The following process guides have been developed for assistance:

- Design Document
- Process Guide (This Document)

#### **PeopleBooks Documentation**

Oracle provides PeopleBooks to help understand the PeopleSoft system. The documentation may seem confusing and abstract at first, but repeated viewing along with reviewing the various business processes will assist in understanding PeopleSoft delivered functionality – such as Query Manager and Query Viewer. The Chancellor's Office maintains the delivered PeopleBooks centrally on the Non-Production login page. This page may only be referenced while on-campus or when a user has accessed the campus network via VPN.

Link:	https://cmsdevlauncher.calstate.edu/launcher/indexH.htm	1	(Note: Sul	ject to	Change)	)
Luuru.	https://emsde/humener.euistate.euu	<u> </u>	(11010.00		Chunge	ź

