

Shared Financial System (SFS) - User Request Process

Overview

This document is an overview of the SFS security request process.

There are 5 request types. Depending on the type, a form may be required as follows:

1. **Add new account**
 - a. Examples: Add user/Add roles.
 - b. Form required?: Yes.
2. **Change account**
 - a. Examples: Add/Remove roles.
 - b. Form required?: Yes.
3. **Delete/inactivate account**
 - a. Examples: User affiliation with UW is terminated. Lock account, remove roles.
 - b. Form required?: Yes, but will take e-mail for emergency.
4. **Reactivate account**
 - a. Examples: Person leaves and comes back.
 - b. Form required?: Yes.
 - i. Essentially, a new form. Must have all new expected roles, authorizations.
 - ii. Cannot use old 3-character logins.
 - iii. Cannot accept "was in the system before" as need to verify new access.
5. **Unlock account**
 - a. Examples: Password entered wrong, cannot login, browser issue.
 - b. Form required?: No. The Business Unit Security Administrator asks SFS Security Coordinator to unlock the account.

Who can submit requests

The table below defines who can submit and authorize SFS security requests.

Modules	Business Unit Security Administrator (BU Sec Admin)
SFS/FA Core Financials (and Project Lite)	BU Sec Admin at the Campuses
Grants (MIL and EXT)	BU Sec Admin at the Campuses
Travel Module	Jan Richardson
	Module Steward
SFS/FA Core Financials (and Project Lite)	The authority for Module Steward has been delegated to the BU Sec Admins by UW System Administration (UWSA).
Grants Module	Mark Sweet
Travel Module	Jan Richardson

When the form is required, it is the responsibility of the BU Sec Admins listed on <http://www.uwsa.edu/fadmin/sfs/BUsecadmin.html> to provide the [SFS User Request Authorization form](#) to the user or user's supervisor to complete.



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Processing

Requests can be submitted by one of the following methods:

E-mail: security.authorizations@doit.wisc.edu	Fax: SFS Security Authorizations 608-265-0667
Campus/US mail: SFS Security Authorizations, 1210 Dayton St., Madison, WI, 53706	

See bullets at bottom of <http://www.uwsa.edu/fadmin/sfs/BUsecadmin.html> for processing rules. You can contact Security Authorizations at 608-265-5591 for clarifications.

Security Authorizations tracks and processes requests as requested. If requests require clarification, Security Authorizations escalates to the SFS Security Coordinator and/or to UWSA.

The Security Authorizations group rejects any form with errors or omissions of required (*) data. If signatures are missing, processing may be delayed while they are obtained. If you simply request to copy the access from another ID, it takes the longest processing time, as all access is researched and multiple signatures may be required.

E-mail requests:

- All needed signatures must be on the form in an attached scanned file.
- The subject must be "SFS - User Request" to avoid SPAM/junk e-mail filtering.
- E-mails will be forwarded for missing signatures, which could cause delays.

Some requests may require additional authorization. In that case, the SFS Security Coordinator will contact UWSA for clarification on these requests. If the request was e-mailed, it will be forwarded as needed. If not, it will be faxed.

The SFS Security Coordinator sends an e-mail to the BU Sec Admin when complete.

Emergency changes

- Send an e-mail to sfs-security-requests@lists.wisc.edu and copy the appropriate BU Sec Admin. Include in the subject line "Emergency User Change" and indicate the following:
 - The name and user id of the individual who requires access
 - The environment the change is needed in
 - The reason for the emergency change
 - The access necessary (i.e. name of role to add)
 - How long access is needed (i.e. two hours, multiple days)

Note: If the time frame for access is more than five business days the user request process must be followed to acquire user access to the role(s) requested.

Other Notes

- Audits of user access are performed quarterly to re-validate the business need.
- Developer (PeopleTools) access is defined in a separate process.
- Questions about requests should be sent to sfs-security-requests@lists.wisc.edu.

Members - sfs-security-requests@lists.wisc.edu	
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