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CIA DELEGATE GUIDE

Creating & Monitoring CIA Requests

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TIP: use this document in its digital form for convenient copying & pasting of links.

CIA Delegates Guide

# Contact Info & Key Websites

## OnBase Workflow

Below are links to OnBase. One way is best for creating CIA Requests. The other is primarily for monitoring CIA Requests.

|  |  |
| --- | --- |
| **CREATE REQUESTS** | **MONITOR REQUESTS** |
| **http://bit.ly/2hiIjhR** | **https://workflow.csusb.edu** |
| **Fastest & easiest** | **Don’t use Edge browser.** **More time consuming** |

TIP: to create a bookmark or favorite – login first before saving either link as a bookmark or favorite. That way when you click your bookmark or favorite you’ll go right to the login screen.

## ISET Contact Info

**Email:** cia-support@csusb.edu

**Phone:** 77262

**ISET Web:** <https://www.csusb.edu/its/security/submit-computerized-information-access-cia-request>

**Knowledge Base Articles:** <https://www.csusb.edu/its/support/knowledge-base-articles>

**NOTE:** The link to the OnBase CIA Request form is NOT on the ISET website.

## ITS Training

 **Email:** ITSTrainingServices@csusb.edu **Phone:** x77425

|  |
| --- |
| **TRAINING SIGN-UP** |
| **https://info001.csusb.edu/cms/reg/courseview.php** |
| **Website to sign up for training** |

TIP: Give these links to requesters so they can sign up for training & review what training they’ve taken.

# New CIA Requests

|  |
| --- |
| **CREATE REQUESTS – Key info** |
| **http://bit.ly/2hiIjhR** |
| **Fast & easy** |

## Create a CIA Request

Basic Steps to Create a CIA Request

Use screenshot of the CIA Request form below to ensure you do basic steps in filling out a request:

STEP 1 - Fill out all the information on the Employee tab.

STEP 2 - Select the tab with the necessary components. (Circle 1)

STEP 3 - Click the ADD button (Circle 2) to open the drop down menu.  Click ADD again if more component are needed. DON’T FORGET THIS STEP!!! Omitting this step breaks the process.

STEP 4 - select one or more components needed access using the dropdown (Circle 3).

STEP 5 - When finished selecting all the access needed go to the AUTHORIZE/SUBMIT/SAVE tab to click the "SAVE" button.  This submits the form.

**NOTE: Blank forms are forms without a component added on any of the pages. This prevents CIA Requests from moving through the process.**

Important Details

Several important details to pay attention to when creating CIA Requests.

#### MPP Information

Ensuring the right MPP is listed when creating a CIA Request is critical. After adding the requester’s employee ID the form should populate with PeopleSoft’s information on the requester, their MPP and Supervisor. Here are situations when this won’t occur:

1. Requester is a student
2. Requester’s position is funded by an Auxiliary like UEC, ASI or SMSU.
3. PeopleSoft has incomplete or inaccurate information.

#### Mirroring

This field is found on the first page - the Employee page. Located midway down on the right, this required field asks “Should access mirror someone?” is only a general point of reference. This does not enable the form to be processed. Situations where this information is helps:

1. Areas where multiple people have the same access. Aids in identifying that all access is being given.
2. The requester is filling a previously held position. Aids in ensuring details of access are granted.
3. When access is complex. Almost all components found on the Student Administration tab have complex security and this detail can be very helpful.

#### Reason for submitting this request

Filling out this open field can eliminate unnecessary phone calls and delays in granting access. Helpful information includes:

1. Identifying specific information needed
2. Naming specific pages or processes that access will support.

|  |
| --- |
| **MONITOR REQUESTS** |
| **Use any browser but Edge** |
| **https://workflow.csusb.edu** |

#  Monitoring Requests

The best place to see the status of CIA Requests is to use “**Custom Queries**”. First login to OnBase Workflow using the URL https://workflow.csusb.edu.

# OnBase Options

Click the 3 horizontal bars in the upper left corner of the window. This reveals all options available to you.

* Document Retrieval – retrieves many different types of forms. Not recommended because the retrieved information is not very helpful.
* **Custom Queries** – provides WF Status and document handle info. Recommended!

*TIP: To avoid these steps save this page as a “Favorite”. Click the star next to the document carat. You’ll be asked to name this “Favorite”. Use “Monitor CIA Requests”. Click save. Next time you login click the star & the “Monitor CIA Requests” will be listed as a Favorite*

* New Form – enables creating new CIA Request forms
* Import Document – *do not use*

### Custom Queries

1. Choose “CIA General”
2. Enter at least one search parameter.


## Finding Forms

1. Enter one or more parameters into the appropriate field.
2. Click “Enter” or the binoculars in the bottom left of the page.

### **Things to Note:**

* OnBase’s search wildcard is “ \* “ *(asterisk)*
* Use wildcard when searching partial words or partial name.
* Only one search parameter is needed.

Example: Someone’s last name is Brown-Welty. The search for last name must be “Brown\*” or “Bro\*”

Example: Searching someone’s first name: Mich\* will pull names like Michelle, Michael and Michaela.

## Interpreting Custom Query Results

Here’s a sample search. Notice the WF Status column (WF = Workflow). This is the information needed to determine the form’s status.

Pay attention to details like the date of the CIA Employee authorized to discern if there’s more than one submission.

## Table: WF Status Translation

|  |  |  |
| --- | --- | --- |
| **WF Status** | **Meaning** | **OnBase Queue** |
| MPP REVIEW | Waits for MPP approval | MPP |
| SECURITY ADMIN REVIEW | Security Admin authorization required | Security Admin |
| IN PROGRESS | Waiting for training validation or ready for implementation. | Training Validation orImplementation |
| COMPLETE | No longer in Workflow – request is finished or fell out of workflow. | No Queue |

# FAQs

#### ACCESS REQUIREMENTS

* What components have paperwork requirements? And what are those requirements?

|  |  |  |
| --- | --- | --- |
| **CIA COMPONENT** | **PAPERWORK REQUIRED** | **DEPT. TO CONTACT** |
| Absence Management – Timekeeper or Approver | Signature Authorization Form | Payroll |
| Master Pay Warrant Authorization (MPWA) | Signature Authorization Form & MPWA form | Payroll |
| ProCard | ProCard application | Purchasing |
| Requisitions | Approval form with signature of authorized signer for chart-string account | Purchasing |
|  |  |  |

#### REQUEST MODIFICATION

* Am I allowed to modify a request after submission?

No. Email cia-support and “cc” the requester & the requester’s MPP. In the email include name, emplid, date of submission and what needs to be changed.

* Can CIA Delegates change the MPP after the form has been submitted?

No. Email cia-support and cc the new MPP. Include in the email: Requester’s name & emplid and date of CIA Request submission along with who will be the MPP Approver.

* Does a manager have to approve the entire CIA Request?

Managers have the ability and authority to add or remove components from a CIA Request. The “Add” and “Remove” buttons on the component’s line allow modification of CIA Requests.

* What if a request needs to be removed?

Email cia-support and “cc” the requester’s MPP. Include name, emplid, date of submission along with the request to remove from Workflow.

#### PROCESS REQUIREMENT

* When is a CIA Request not needed for changing access?

A person increasing their current access in a specific component will not need a CIA Request. For example, if the Student Records View access needs upgrading or slight modification. The only exception is when adding departments to those with MPWA or Absence Management Access. This is when a new CIA Request is required.

* What if a new employee’s access needs to mirror someone no longer at the university?

Screen shots are made of the PeopleSoft access of exiting personnel. Email cia-support@csusb.edu to request details about retrieving PeopleSoft access screen shots.

* Why is a new CIA Request needed when people transfer?

It cannot be assumed a transferee's access for their new duties will match the access of their old position. Hence, standard security practice is to remove administrative PS access then require a new CIA request must be submitted. However, CIA Delegates can submit requests for incoming personnel before they arrive.

#### ONBASE FUNCTIONALITY

* Why does the screen go blank when submitting a CIA Request?

If you're using a browser other than Microsoft Internet Explorer, there will be a blank page upon submission.  This is a known OnBase issue.

* Can Mac users create CIA forms since OnBase works only with Internet Explorer?

 Yes - by using a virtual environment. Contact cia-support@csusb.edu for additional details.



# CIA Request Process Flow



# CIA Components – Descriptions, Requirements, & Training

The spreadsheet containing this information is available separately. Retrieve it from the ISET website listed in the header of this document or email cia-support@csusb.edu for a copy.

TIP: Use the CIA Components spreadsheet with descriptions, requirements and training in its digital form to enable easy search capabilities and manipulation of the information.