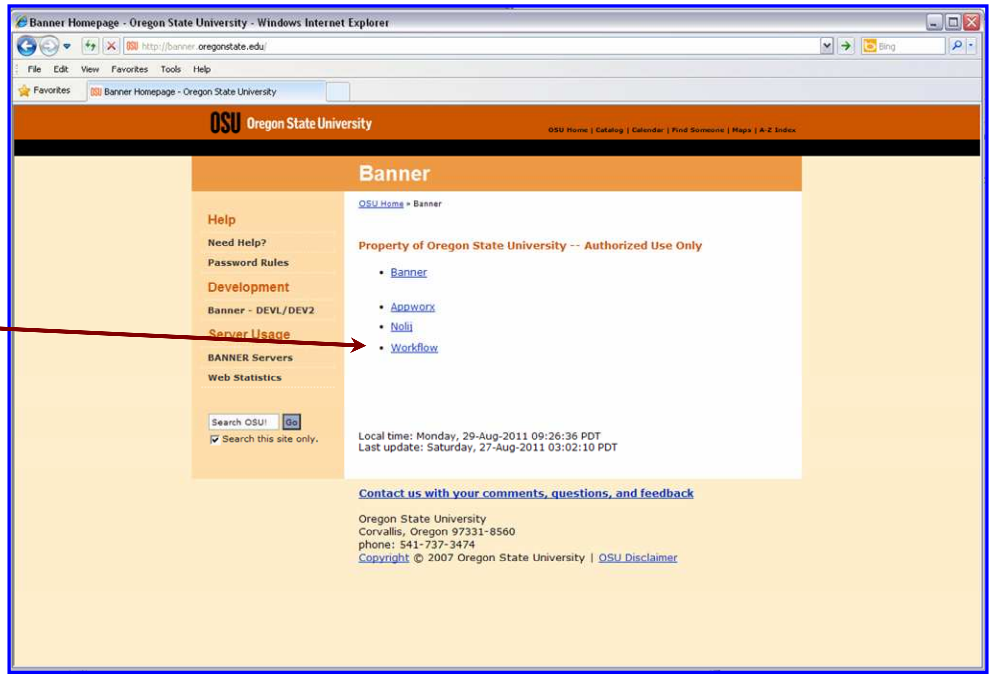
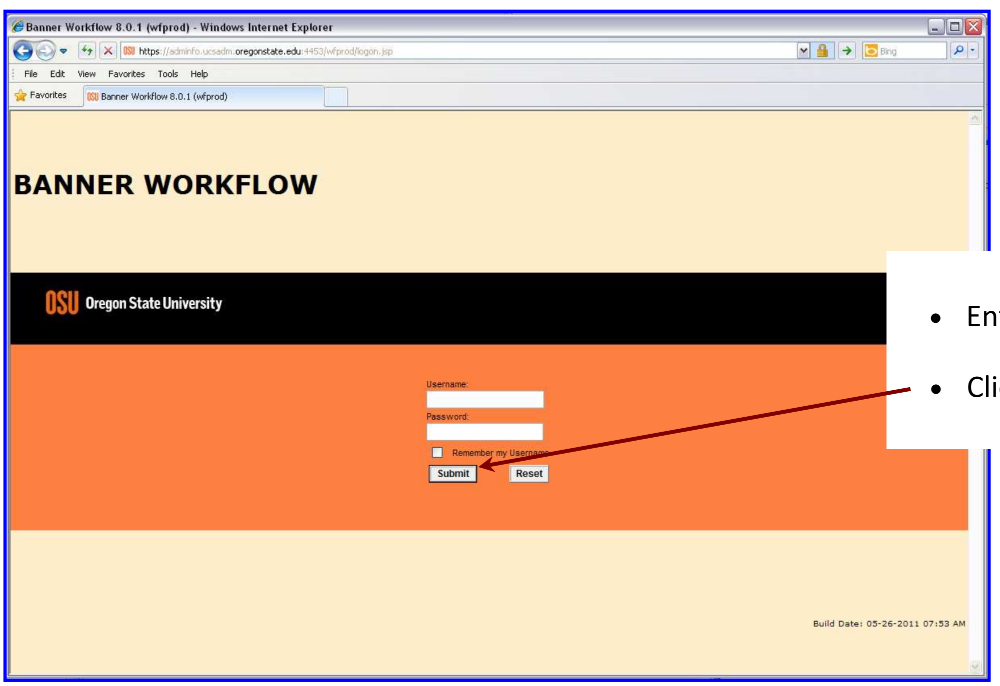
Submitting a **Security Access Request** using Workflow

Navigate to the Banner Home Page: http://banner.oregonstate.edu



- Select **Workflow**

The Banner Workflow **Login** screen appears:

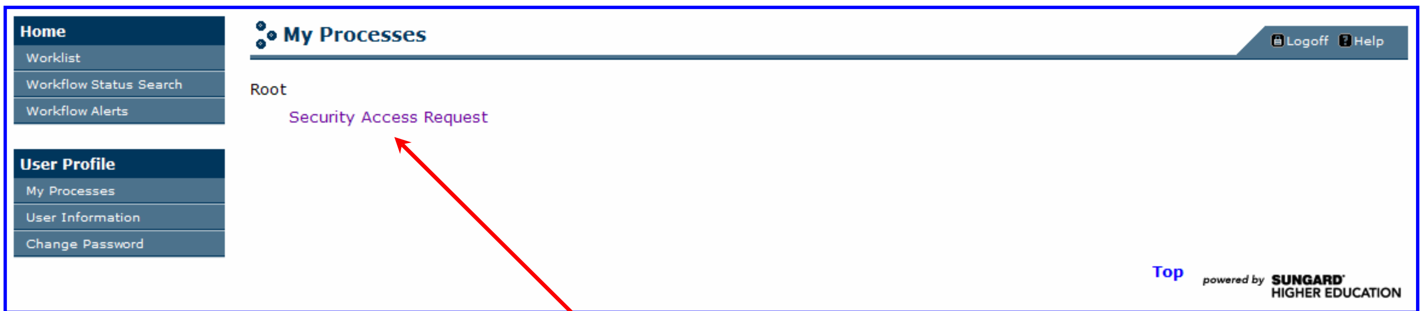


- Enter your ONID credentials
- Click **Submit**

The Banner Workflow **Worklist** screen appears:

- Select **My Processes** from the User Profile menu

The Banner Workflow **My Processes Menu** appears with a list of your available Processes:

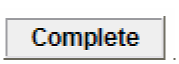


- Select **Security Access Request**

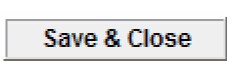
The **Security Access Request** Workflow has three tasks (or pages):

- Starting the Workflow,
- Entering the Workflow Data & attaching the request document, and
- Reviewing & confirming the Employee Data.

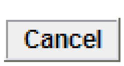
Each of the tasks will have some steps to take, and each of the task pages will have three navigational buttons near the bottom of the page:



- Clicking the **Complete** button completes this task in the workflow and returns the Workflow item to your Worklist ready for the next task.



- Clicking the **Save and Close** button saves the data and selections on this page and returns the Workflow item to your Worklist at the current task.

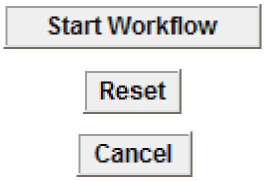


- Clicking the **Cancel** button does not save any changes to data and selections on this page and returns the Workflow item to your Worklist at the current task.

When the Position Number data field is not changed from the C00000 default or is left blank, two additional task pages will be added to the process to identify a legitimate Position Number and Organization code. The Workflow process can not be moved forward without this information. For this help sheet, we will assume that you have all of the information to be entered available before starting the Workflow.

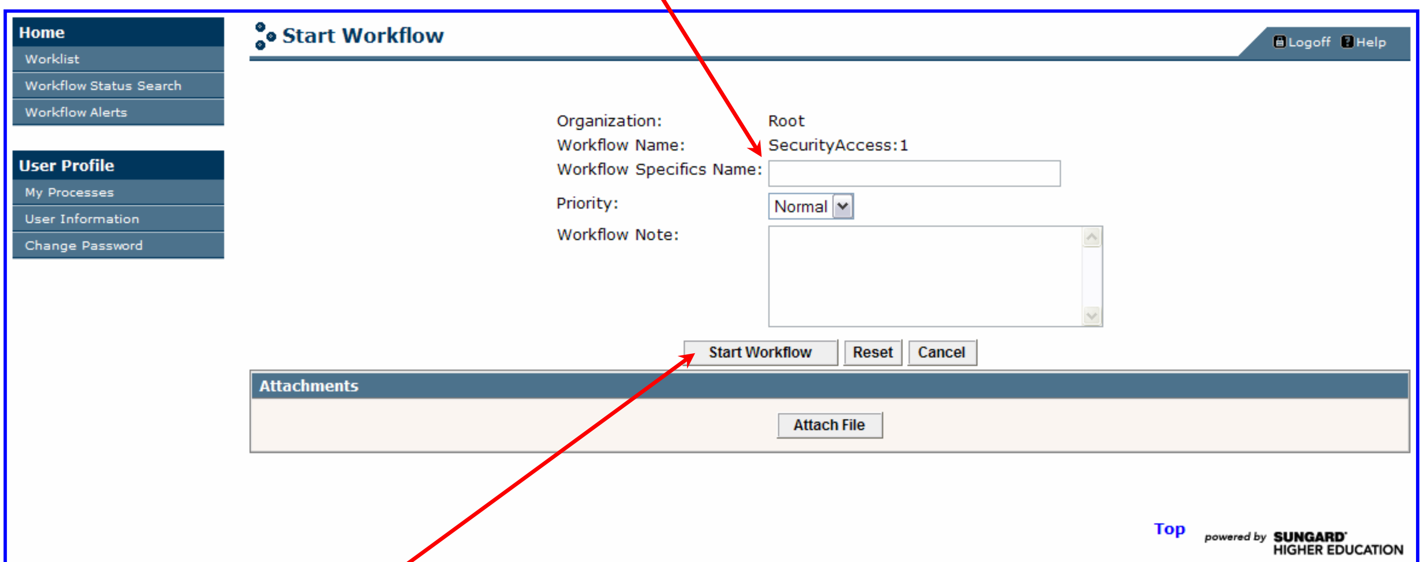
The Banner Workflow **Start Workflow** page:

The three navigational buttons near the bottom of the **Start Workflow** page will offer different choices:

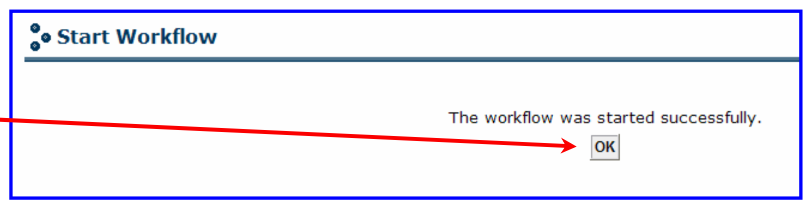


- Clicking the **Start Workflow** button completes the start task in the workflow and displays a Workflow Started confirmation.
- Clicking the **Reset** button will clear the data in this page.
- Clicking the **Cancel** button cancels the Workflow item.

On this page you can enter a **Workflow Specifics Name**, though it will be modified to include the user's Name and University ID in later stages of the Workflow. By leaving the name field blank, the Workflow item will be listed as "undefined" by default.



- Click the **Start Workflow** button, and
- Click the **OK** button for the Workflow Started confirmation.



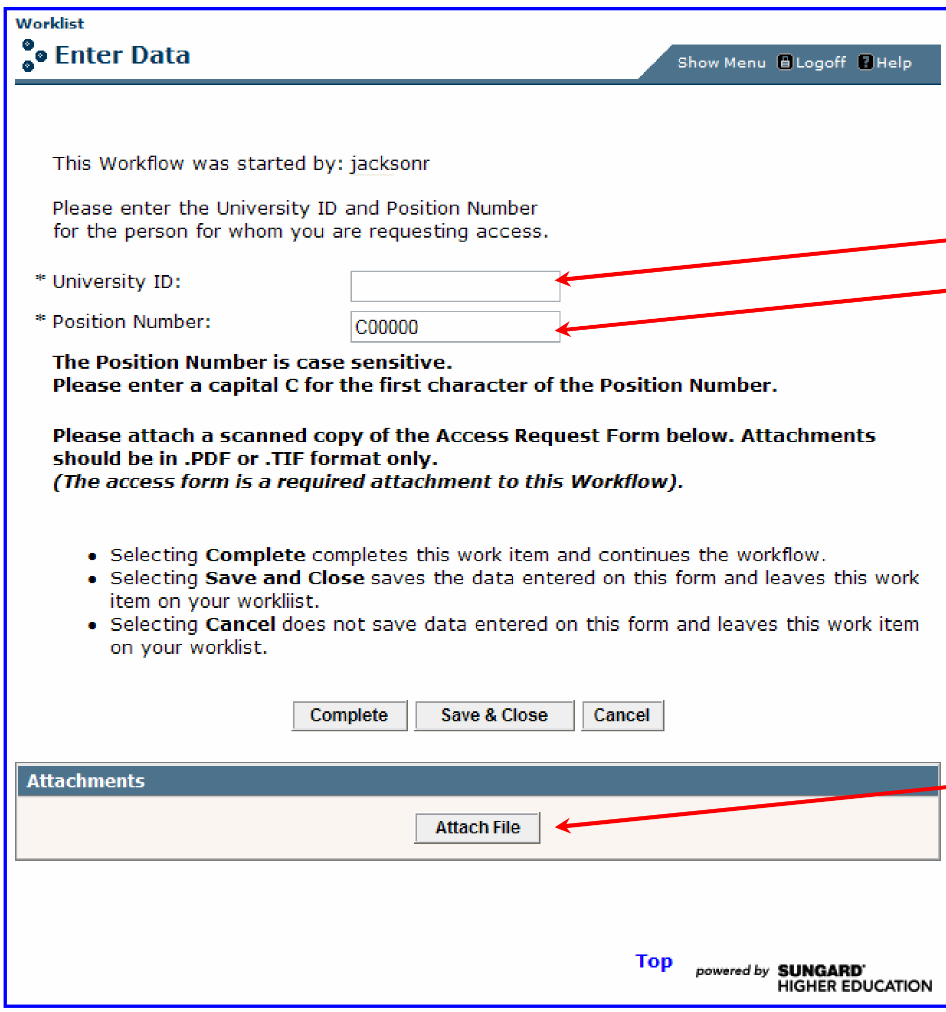
You will be returned to the **Worklist** page listing the Workflow items you have in your queue. There may be times that you won't see your new Workflow item until you either re-select Worklist or refresh your browser page.

- Select the Workflow item you just started by clicking on the blue item name.

The Banner Workflow **Enter Data** page:

On this page you can assign three things for the person whose access is being requested:

- The **University ID** — This field ***must*** be a legitimate OSU ID without any dashes.
- The **Position Number** — This field will default to C00000. When the Position Number data field is not changed from the default value or is left blank, the process will look up all active position numbers filled by the employee. The Position Number field is case sensitive, so be sure to capitalize the leading character.
- A **Request for Access** form — A scanned copy of the signed Security Access Request form ***must be attached*** before you can move beyond this task. Workflow will only pass .PDF or .TIF files to Nolij.

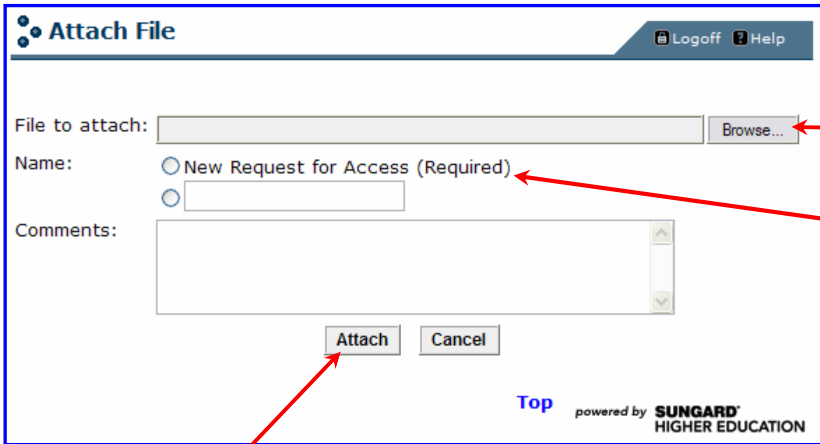


- Enter the **University ID**.
- Enter the **Position Number**.
- Click on the **Attach File** button.

The **Enter Data** task is not complete until the electronic file has been attached. An additional page will open to facilitate the attachment, and then once that is done, you will be returned to the **Enter Data** task to complete it. Be sure that you have a scanned file of the original signed Request For Access accessable to your browser.

The Banner Workflow **Attach File** page:

There are three steps to attach a file

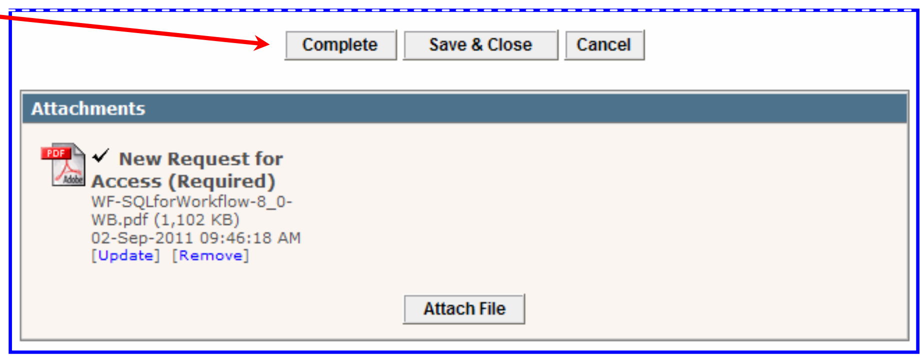


- Click the **Browse** button to locate the .PDF or .TIF file on your system.
- Select the **New Request for Access (Required)** radio button .

The second field and radio button are used to attach supporting documents such as an email. This must be done as a separate task.

- Select Attach

The Attach File page will close and you will be returned to the **Enter Data** page with the document attached. Click the **Complete** button to complete the **Enter Data** task and return to the Worklist.



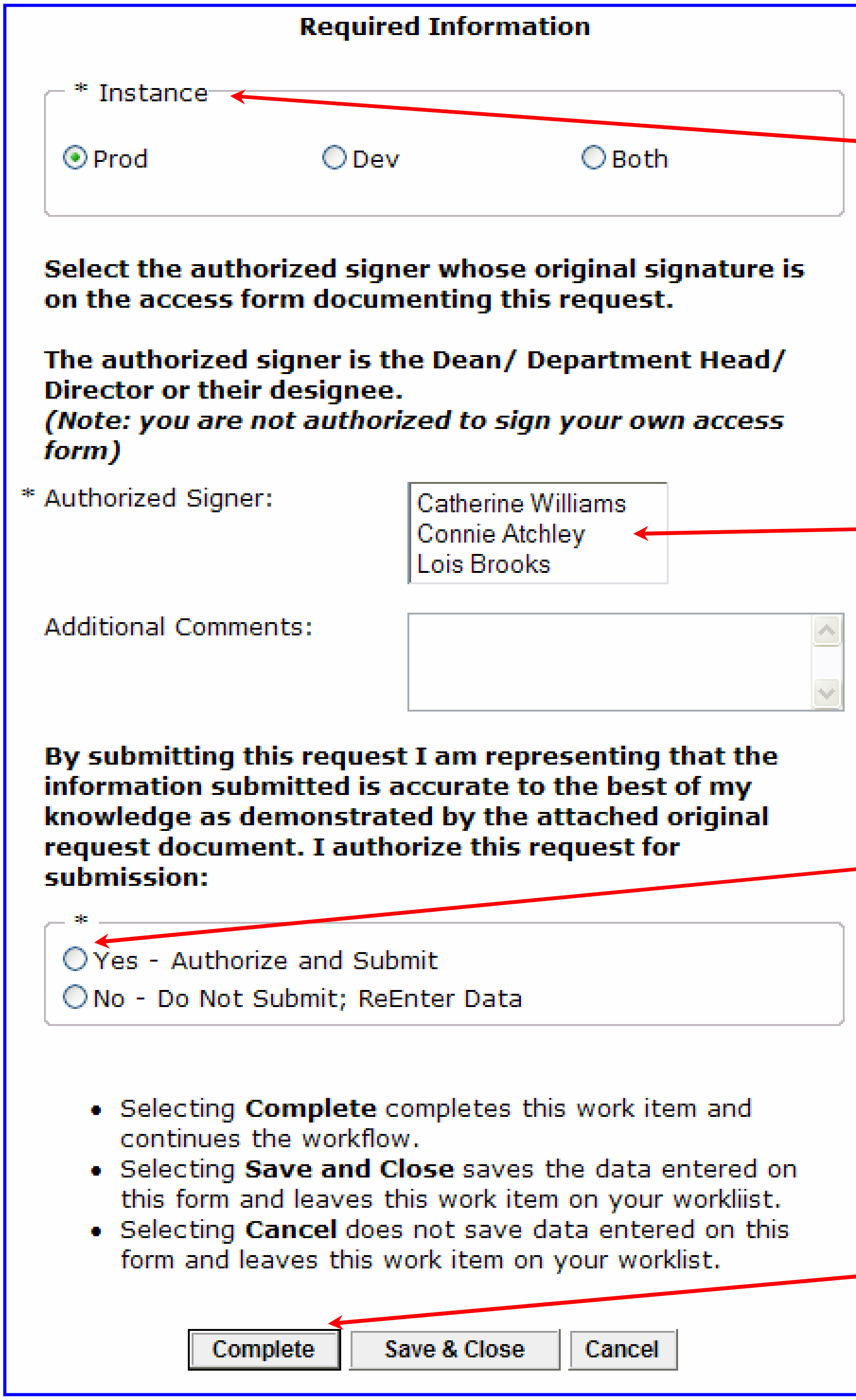
The workflow process will gather the person and position information, including a list of Authorized Approvers for the org to which the position reports. It will also change the name of the workitem to: **Security Access Request for [firstname] [lastname] ID: [university id]**.

This may take 15-30 seconds, so refresh your Worklist to see when the item is available again. You may need to refresh more than once.

- Click on the Worklist item name to review the information

The Banner Workflow **Review Employee Data** page:

A Review screen will appear to allow you to review the information about the person for whom you are requesting access. Please review all the information in the top half of the page for accuracy. If that information is accurate, then you have three more steps to complete your submission.



Required Information

* Instance

Prod Dev Both

Select the authorized signer whose original signature is on the access form documenting this request.

The authorized signer is the Dean/ Department Head/ Director or their designee.
(Note: you are not authorized to sign your own access form)

* Authorized Signer: Catherine Williams / Connie Atchley / Lois Brooks

Additional Comments:

By submitting this request I am representing that the information submitted is accurate to the best of my knowledge as demonstrated by the attached original request document. I authorize this request for submission:

*

Yes - Authorize and Submit

No - Do Not Submit; ReEnter Data

- Selecting **Complete** completes this work item and continues the workflow.
- Selecting **Save and Close** saves the data entered on this form and leaves this work item on your workliist.
- Selecting **Cancel** does not save data entered on this form and leaves this work item on your worklist.

Complete Save & Close Cancel

- Select the Instance for which access is being requested. The default is PROD
- Select the Authorized signer **who signed the Access Request Form** from the drop down list
- If everything is correct, select **Yes – Authorize and Submit**

  If some of the information is incorrect, select **No – Do not Submit; ReEnter Data**, and you will be returned to the Enter Data task.
- Click the **Complete** button to complete your **Security Access Request** Workflow.

You will receive an email indicating that your request has been received and checked into the access approval process. It will also include contact information and a link to training information.