

CO-1092 Training for Security Liaisons

Introduction

The following document is intended for Agency Security Liaisons for creating and managing CO-1092 Security Requests. The CO-1092 Security Request page will only display User IDs for employees a Security Liaison has access to in Core-CT; this is determined by the Liaison’s Primary Permission list (Row Security) in the HRMS system. Department Row Level Security in Core-CT determines the employees a User will have access to in the various HRMS modules or EPM. This is further defined by the Row Security field on the General Tab on the User Profile page. Each User will have a unique Permission List value in this field that is generated by the system. The Row Level Security Permission List will comprise of the User’s Employee ID preceded by ‘DP’.

In the example below, ‘DP025037’ is the Row Level Security Permission List for Employee ID 025037 (User ID ‘CTSECLIAISON’):

Navigation: Core-CT HRMS > Peopletools > Security > User Profiles > User Profiles

The screenshot shows the 'User Profile' page for user 'CTSECLIAISON'. The 'General' tab is active, displaying the following information:

- User ID:** CTSECLIAISON
- Description:** BOR-AGY SECURITY LIAISON
- Logon Information:** Symbolic ID (SYSADM1), Password (masked), Confirm Password (masked), User ID Alias, Edit Email Addresses, Instant Messaging Information.
- General Attributes:** Language (English), Currency, Default Mobile Page, Enable Expert Entry (checkbox).
- Permission Lists:** Navigator Homepage, Process Profile (CTPRPRU), Primary (PPHRAGY), **Row Security (DP025037)**.

At the bottom, there are 'Save' and 'Return to Search' buttons, and a breadcrumb trail: General | ID | Roles | Workflow | Audit.

Department ID BOR85500 is assigned to the 'DP025037' Row Security Permission List; therefore, this user will only have access to employees in Department BOR85500:

Favorites ▾ Main Menu ▾ Core-CT HRMS ▾ Set Up HCM ▾ Security ▾ Core Row Level Security ▾ Security by Dept Tree

My HR Finance Manage CRM My CRM Core-CT Help CT Interfaces

Security by Dept Tree

Row Security Permission List: DP025037 Data Sec by Tree (025037)
 Refresh Tree Effdts by 11/04/2016 Refresh Tree Effective Dates

*Set ID	*Dept ID	*Access Code	Effective Date of Tree
UNIVS	BOR85500 Eastern CSU	Read/Write Acces	09/16/2016

Once a CO-1092 Security Request has been processed, the CO-1092 Search Page can be used to see pending, denied and completed requests. Security Liaisons will be unable to select User IDs on the CO-1092 form if the Agency Acronym in Department Description of the User Profile is for an agency they do not have access to. Note: For employees that have transferred into your agency, please contact the Core-CT security team at corect.security@ct.gov to have the agency acronym updated; after which point the User ID will be made available.

CO-1092 Security Request – New Request

1. The Security Liaison will login to PeopleSoft Portal and navigate to Main Menu > Core-CT HRMS > PeopleTools > Security > CO-1092 Security > CO-1092 Security Request, or Main Menu > Core-CT Financials > PeopleTools > Security > CO-1092 Security > CO-1092 Security Request.
2. The Security Liaison will click on the **Add New** tab.

My HR

Finance

Core-CT Help

CO-1092 Security Request


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

Search Criteria

Transaction Number: =

Transaction Date: = 

User ID: begins with

Empl ID: begins with

Name: begins with

Include History Correct History Case Sensitive

Limit the number of results to (up to 300):

Search

Clear

Basic Search

 Save Search Criteria

- The **Transaction Number** will not be editable, but will auto-generate when the CO-1092 Security Request is saved.
- The **Transaction Date** will not be editable, but will default to the current date and has no impact on when the security request will be completed and processed.


CO-1092 Security Request

Find an Existing Value

Add a New Value

Transaction Number:

Transaction Date:

User ID: 

Add

- User ID** field is required to know which employee needs to obtain new roles, delete existing roles, or update other security items such as Row Level security, Time and Labor groups or Business Units. If you know the User

ID you can enter it in the field, otherwise, you can search by using the magnifying glass icon to the right of the field. This will open a search dialog that allows you to search using Description and/or User ID.

Note: The lookup will allow you to see all User Profiles in the system; however, you are only allowed to select User ID's for which you have access to create CO-1092 Security Requests.

Look Up User ID

User ID: begins with

Description: begins with

Look Up Clear Cancel [Basic Lookup](#)

Search Results

Only the first 300 results can be displayed.

View 100 First 1-300 of 300 Last

User ID	Description
001019	Carolyn Ennis
007126	Caitlin Calder
007766	Kirsten Rigney

6. When the **User ID** is selected click on the Add button.
7. The following fields will be automatically populated when the **User ID** is selected: **Employee ID, Name, Email ID, and Telephone** on the CO-1092 Security Approval Page.
 - a. **Employee ID** is retrieved from the employee User Profile table and does not have any impact on how the request is approved. This field is informational only.
 - b. **Name** is retrieved from the employee names table and does not have any impact on how the request is approved. This field is informational only.
 - c. **Email ID** field is retrieved from the employee User Profile table and does not have any impact on how the request is approved. This field is informational only.
 - d. **Telephone** field is retrieved from the employee phone numbers table and does not have any impact on how the request is approved. This field is informational only.

Favorites ▾ Main Menu ▾ > PeopleTools ▾ > Security ▾ > CO-1092 Security ▾ > CO-1092 Security Request

ORACLE

CO-1092 Security Request | Comments

Transaction No. Transaction Date 09/19/2016 Workflow Status Not Available

Request Details

*User ID COREPerkinsS *Manager User ID COREBlackDon

Empl ID 449397 Manager ID 357782

Name Perkins, Stephen E. *Manager Name Black, Donalynn N

Email ID doit.core.emailtest@ct.gov Manager E-mail doit.core.emailtest@ct.gov

Telephone 8606222582 Core

Department ID OSC15000

[View Existing Roles](#)

Security Roles (Add/Delete) Personalize | Find | View All | [Print] [Calendar] First 1-3 of 3 Last

	*Role Name	*Role Actions	Description		
1	CT AGY HR SPECIALIST	Add ▾	This is a Valid Role.	+	-
2	CT AGY TL VIEWER	Add ▾	This is a Valid Role.	+	-
3	CT EPM PRIVATE	Add ▾	This is a Valid Role.	+	-

8. The **Manager User ID** field is required to route the Security Request to the proper approving manager. Once a Security Request has been submitted, the manager will receive a request to approve the transaction. The Manager User ID field will only allow selection of Managers who have the CT_CO1092_APPRV_MGR role assigned to their user profile.
9. The following fields will be automatically populated when the **Manager User ID** is selected:
 - a. **Manager ID** is retrieved from the managers User Profile table and does not have any impact on how the request is approved. This field is informational only.
 - b. **Manager Name** is retrieved from the employee names table and does not have any impact on how the request is approved. This field is informational only.
 - c. **Manager E-mail** address is retrieved from the User Profile table and does not have any impact on how the request is approved. This field is informational only.
10. **Row Security** section of the page help define the following:
 - a. **Edit Departments (HRMS only)** - *Effective Tuesday, November 8, 2016, maintenance of Department Row Level Group security was removed from the on-line CO1092 Security Requests form and central processing for this by Core-CT Security will no longer be necessary. Please refer to the 'Department Row Level and Time & Labor (TL) Group Security Training for Agencies – Addendum to the CO1092 Training for Liaisons' job aid on how to setup Row Security in Core-CT: http://www.core-ct.state.ct.us/security/pdf/Row_Level_TL_SEC_Trng.pdf*

- b. **Edit TL Groups (HRMS only)** - Effective Tuesday, November 8, 2016, maintenance of TL Group security was removed from the on-line CO1092 Security Requests form and central processing for this by Core-CT Security will no longer be necessary. Please refer to the 'Department Row Level and Time & Labor (TL) Group Security Training for Agencies – Addendum to the CO1092 Training for Liaisons' job aid on how to setup Row Security in Core-CT: http://www.core-ct.state.ct.us/security/pdf/Row_Level_TL_SEC_Trng.pdf
- a. **Business Units (Financials CO1092 only)** – If the Row Level Security permission list is not known, the Business Units page will allow the Liaison to specify which Business Units a User ID will have access to. If information is entered, the Core-CT Security team will determine the best option.

CO-1092 Security Request | Comments

Transaction No.	Transaction Date	11/04/2016	Workflow Status
-----------------	------------------	------------	-----------------

Request Details

*User ID	COREPerkinsS	*Manager User ID	COREBlackDon
Empl ID	449397	Manager ID	357782
Name	Perkins, Stephen E.	*Manager Name	Black, Donalynn N
Email ID	Stephen.perkins@ct.gov	Manager E-mail	donalynn.black@ct.gov
Telephone	8606222582 Core	Primary Permission	<input type="text"/> Edit Business Units

[View Existing Roles](#)

Security Roles (Add/Delete) Personalize | Find | View All | First 1 of 1 Last

*Role Name	*Role Actions	Description
1 <input type="text"/>	Add	This is a Valid Role.

Personalize | Find | View All | First 1-2 of 2 Last

Business Unit	Description
1 OTTM1	Office of the State Treasurer
2 OTTIU	OTT-Unclaimed Property Div.

- b. **Origins (Financials CO1092 only)** – If Origins need to be added or removed to/from a user’s profile, the changes will be made on the Financial Appendix page (http://www.core-ct.state.ct.us/security/xls/fin_appdx.xls). After the financial appendix page is completed, the Security Liaison will attach it to the online Security Request via the Comments Tab.
Note: When adding an Origin, please remember to add the role under the Security Roles section of the online CO-1092 even if the user already has the role.

CO-1092 Security Request Comments

Transaction Number Transaction Date 05/01/2013 User ID BeardA

Scroll Area Print View All Page 1 of 1 List Close

Effective Date 05/01/2013

Comments/
Business
Justification

Add Origins per attached

Attached File PO_Origins_test.xls

View Delete

- c. **Additional Comments** – The Comments page can be used to enter ad hoc comments among between Security Liaisons and multiple approvers. Please limit this space to text entry only. If PDF or other types of documents need to be referenced, they can be attached. Also, if additional supporting documentation is needed for justifying the need for conflicting roles, the Comments page is also where a Liaison would include any pertinent comments and attachments such as any agency internal audit procedures required by OSC or DAS.

11. **Security Roles (Add/Delete)** section is used to specify the roles that should be added or deleted for the User Profile selected. Use the + and – buttons on the far right of the grid to add or remove rows of data.

Security Roles (Add/Delete) Personalize | Find | View All | First 1-2 of 2 Last

	*Role Name	*Role Actions	Description		
1	CT AGY PAYROLL SPECIALIST	Add	This is a Valid Role.	+	-
2	CT AGY HR POSITIONS VIEWER	Add	This is a Valid Role.	+	-

Submit

12. The following rules apply for Security Roles:

- a. If Roles are being **Added** and
 - i. If the User Profile does not have a Security Role assigned that is being selected, the Description will be: "This is a Valid Role."
 - ii. If the User Profiles already has a Security Role being selected, the Description will be: "The User Profile already has this Security Role."
 - iii. If the User Profile already has a Security Role such as CT AGY HR SPECIALIST, and a Security Role being added conflicts with the existing role because of segregation of duties, the Description will be: "This role conflicts with existing role: CT AGY HR SPECIALIST."
 - iv. If one or more Security Roles being added conflict with Segregation of Duties, the Description will be: "Segregation of Duties exception."
- b. If Roles are being **Deleted** and
 - i. If the User Profile has the role being deleted, the Description will be blank.
 - ii. If the User Profile does not have the role being deleted, the Description will be blank.

13. When the roles have been added to the Security Roles (Add/Delete) grid you can Save the form and the following will happen:

- a. The transaction number will be auto-generated and saved for the transaction you have created. Use this transaction number to track the request. You can always come back to it and make changes if the Request has not been submitted for approval. Once the CO-1092 Security Request has been submitted for approval, you can no longer make changes.

14. When the form is ready to be submitted for approval. Save the form and then click the **Submit** button.