

Welcome to Workflow!

Workflow is our web based, work and data warehouse security request entry/tracking system.

About Workflow

Work Requests

You can submit a new work request OR you can re-visit a request you have already submitted.

All new work requests generate a unique request number and an immediate screen confirmation of your request. Both you and the ACS line of business manager will receive an e-mail notification summarizing the request. Any supporting documents you upload as attachments become part of your request record. All uploaded attachments can be viewed when you review your request record.

All existing work requests (if not closed) can be re-visited and updated. If you update an existing request you will receive an immediate screen confirmation and e-mail summary again.

You can only review and/or update your requests.

Once in the Workflow system, all work requests are assigned a “type of service” and “status code”.

Type of service can be “sla” – service level agreement (if you entered an sla number) or “wkreq” – work request.

The “status code” will change in order to reflect current work request activity. All new requests are initially assigned a “received” status code.

Data Warehouse Security Requests

You can only submit new Data Warehouse Access (security) requests.

If you have changes to an existing request you need to initiate a new request.

All new Data Warehouse Access security requests will generate a unique request number and an immediate screen confirmation of your request. You, your manager and the designated data custodian will receive an e-mail notification summarizing the request. Any supporting documents you upload as attachments will become part of your request record.

You will be notified if your security has been rejected and/or when your security has been implemented.

Using Workflow

You must have a University NetID and password (this is the same entry pair that you use with PeopleSoft).

Your first entry into the Workflow system will require your NetID and password. If you have started a Workflow session and continue to navigate within Workflow and use other processes, you will not have to enter your NetID and password combination again.

Remember to logout when you are done.



[LOGOUT](#)

To initiate a new work request ...

Select **ACS Work Request** from the ACS Services page: http://www.rochester.edu/its/acs/acs_ourservices.html and you will be presented with the following prompts.

NetID:

Password:

After your "Log In" ... you are presented with the following options:

Select **Submit New Request** and you will be presented with the Work Request form with six (6) pre-populated fields with data related to your netid. You cannot alter these fields.

Administrative Computing Services



Work Request

[LOGOUT](#)

Requester Name:

Ann Olsen

Department Name:

ITS/ACS

Phone:

585-275-0569

Date:

04/12/2006

E-Mail:

ANNO@acs.rochester.edu

Business Location:

727 ELMWOOD AVE RM 2

but you need to fill in the rest as defined on the next page!

		Manager Approval E-Mail: <input type="text"/>	
Request Name: <input type="text"/>	Business Area: <input type="text" value="Select from list!"/>	Business Justification: <input type="text" value="Select from list!"/>	Priority: <input type="text" value="Select from list!"/>
Requested Completion Date: <input type="text"/>	SLA # (if applicable): <input type="text"/>	SL Account #: <input type="text"/> <input type="text"/> <input type="text"/>	% <input type="text"/> <input type="text"/> <input type="text"/>

Description of Work:
(text beyond 240 characters will not be recorded!)
Create an attachment if you want to provide a detailed explanation

Add an attachment: Browse ...

<input type="button" value="Submit"/>	<input type="button" value="Reset"/>
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Work Request Screen fields

Bold = required field

- Manager Approval E-Mail:** This email address will be used to communicate back estimates and to accept or reject this request.
- Request Name:** This is the title of the project that this work request applies to. This can be left blank.
- Business Area:** These are the valid lines of business supported by ACS. Only one lob can be selected.
- Advancement
 - Data Warehouse
 - FRS, AP, Parking, United Way, Secure Pay, Budget, Miser
 - Human Resources
 - Student
 - Other
- Business Justification:** Select only one. Select the category that most closely matches your needs.
- Enhancement
 - Error Correction
 - Cost Reduction
 - Compliance
 - Improve Customer Service
- Priority:** Select only one. Select the category that most closely matches your needs.
- Critical
 - High
 - Medium
 - Low
- Requested Completion Date:** This is the date you would like the work done by.
Format: mm/dd/ccyy
- SLA#** If the work request has an established SLA in place it should be entered here.
- SI Account#** Enter the 10 digit account (including subcode) this work should be charged to. You can enter up to 3 accounts.
Format: xxxxxxxxxx
- %** This field needs to be filled in ONLY if there are multiple accounts funding a request. If you have more than one account listed, the percentages must add up to 100%.
- Description of Work:** This is a free form text box where you can indicate additional details.
- Add an attachment:** You can submit (upload) additional documentation regarding your request. All uploaded documents supporting your request will be associated with your request number. Click on the browse button to select where you will look for the attachment to upload from (desktop, server drive, etc.). You must have the fully qualified address of the document displayed in the upload box.
- Submit:** Sends the work request and initiates an immediate screen confirmation. Your request details will be summarized in an e-mail including the unique request number that has been assigned.

To re-visit a previously submitted work request ...

Select **ACS Work Request** from the ACS Services page: http://www.rochester.edu/its/acs/acs_ourservices.html and you will be presented with the following prompts.

NetID:

Password:

After your "Log In" ... you are presented with the following options:

Select **Your Requests in Progress** and you will be presented with a list of Work Request forms you initiated. Click on the Req # to look at a specific request record.

The same fields that were pre-populated on a new request can still not be altered by you. However, other fields can be changed.

Supporting Documents

Any documentation that you uploaded is listed with this record and can be viewed.

To initiate a Data Warehouse Access request ...

Select **Access to Data** from the ACS Services page: http://www.rochester.edu/its/acs/acs_ourservices.html, then the **Data Warehouse Access Request Form**, and you will be presented with the following prompts.

NetID:

Password:

After your "Log In" ... you are presented with the following option:

Select **Submit New Request** and you will be presented with the Data Warehouse Access Request form with eight (8) pre-populated fields with data related to your netid. You cannot alter these fields.

Administrative Computing Services



Data Warehouse Access Request

[LOGOUT](#)

Requester Name:

Department Name:

Phone:

Date:

E-Mail:

Business Location:

Net ID:

Aolsen

Employee ID:

555555

but you need to fill in the rest as defined on the next page!

Manager Approval E-Mail:

Accounts Payable Advancement Gifted Memory Student United Way

FRS - select only one category! (Division, Department or Account Number)

FRS Division Code(s)	FRS Department Code(s)	Account Numbers (maximum 10)	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Cumsal - select only one category! (Division, Department or Account Number)

FRS Division Code(s)	FRS Department Code(s)	Account Numbers (maximum 10)	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Space - select only one category! (Campus or Account Number)

Campus	Account Numbers (maximum 10)	
<input type="text" value="Select from list!"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>

Add an attachment: Browse ...

I agree to the following:

The access or use of any University of Rochester data for one's own personal gain or profit, for the personal gain or profit of others, or to satisfy one's own personal curiosity or that of others is EXPRESSLY FORBIDDEN. Also forbidden is the disclosure or distribution of University of Rochester data in any medium, except as required by this employee's job responsibilities. Violations of these guidelines will be dealt with seriously, up to and possibly including employment termination.

Data Warehouse Access Request fields

Bold = required field

- Manager Approval E-Mail:** This email address will be used to alert the requester's manager that his or her approval is required for this request as well.
- Data** You must choose at least one data family! More than one data family can be selected.
- Accounts Payable
Advancement
Gifted Memory
Student
United Way
- FRS
Cumsal
- Space
- Add an attachment:
- I agree to the following:**
- Submit:
- These are data choices that if selected (and approved), give you access to all data.
- These are data choices that require you to specifically ask for access by either Division, Department or Account.
- This is a data choice that requires you to specifically ask for access by either campus or account numbers.
- You can submit (upload) additional documentation regarding your request. All uploaded documents supporting your request will be associated with your request number. Click on the browse button to select where you will look for the attachment to upload from (desktop, server drive, etc.). You must have the fully qualified address of the document displayed in the upload box.
- You must indicate your agreement with the confidentiality statement.
- Sends the Data Warehouse access request and initiates an immediate screen confirmation. Your request details will be summarized for you in an e-mail with the unique request number that has been assigned. Your manager and the appropriate data custodian will also be notified of your request. Both your manager and the data custodian need to respond to your request and indicate an approval or denial before your security request can be applied.