

Department Technology Security Reviewer Guide

Business Process Overview

This provides guidance to the Department Technology Security Reviewer on:

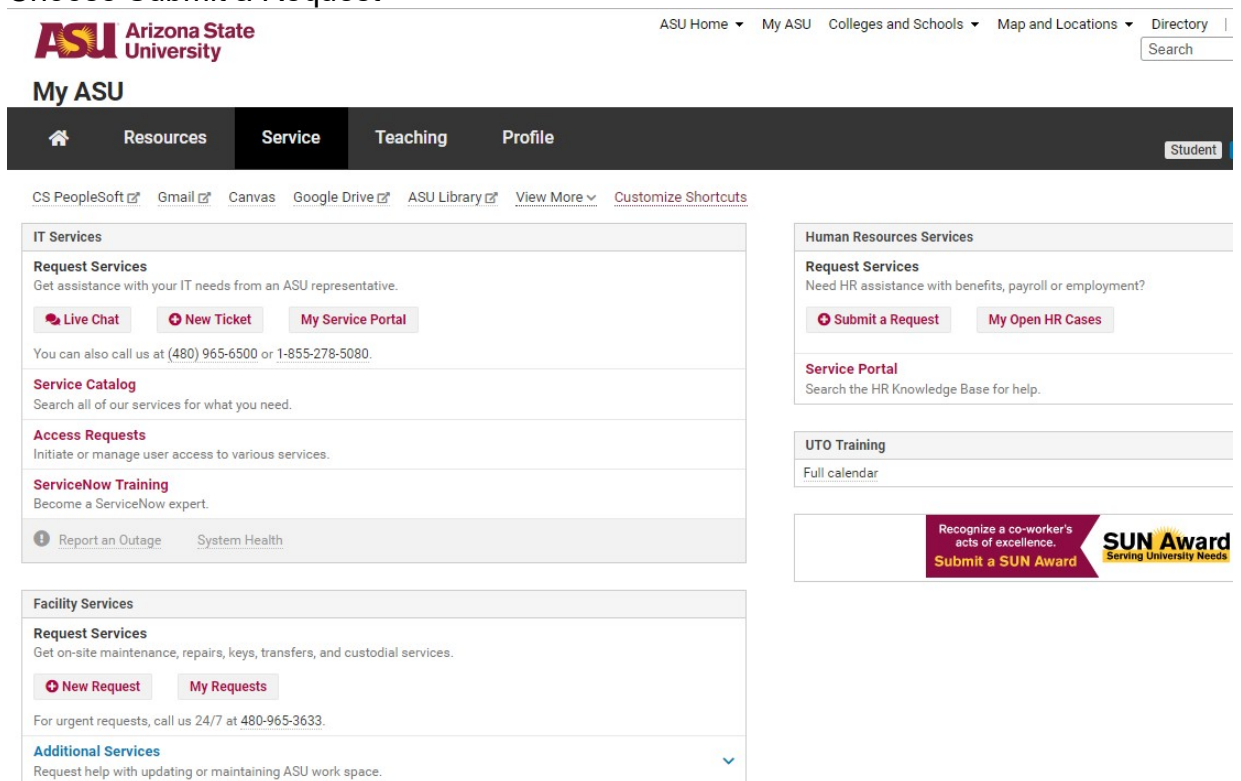
- How to request the required role
- How to change their FMS profile preferences related to notifications
- How to review and approve requisitions

Business Process Pre-requisites

- Complete the TAG Certification training
- Submit request for the Department Technology Security Review role

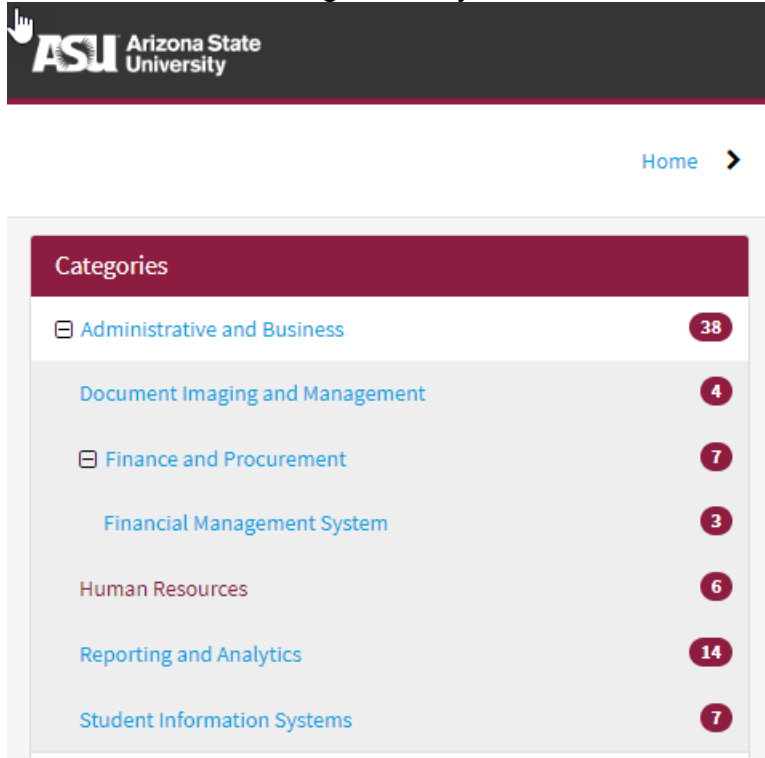
Obtaining the required Role in FMS

1. Access My ASU
2. Select the Service tab at the top of the page
3. Choose Submit a Request



The screenshot shows the 'My ASU' portal with the 'Service' tab selected. The main navigation bar includes 'Resources', 'Service', 'Teaching', and 'Profile'. Below the navigation bar, there are links for 'CS PeopleSoft', 'Gmail', 'Canvas', 'Google Drive', 'ASU Library', 'View More', and 'Customize Shortcuts'. The main content area is divided into two columns. The left column contains sections for 'IT Services' (with 'Request Services', 'Service Catalog', 'Access Requests', and 'ServiceNow Training'), 'Facility Services' (with 'Request Services' and 'Additional Services'), and 'Report an Outage' / 'System Health'. The right column contains 'Human Resources Services' (with 'Request Services' and 'Service Portal'), 'UTO Training' (with 'Full calendar'), and a 'SUN Award' banner.

4. Select Financial Management System

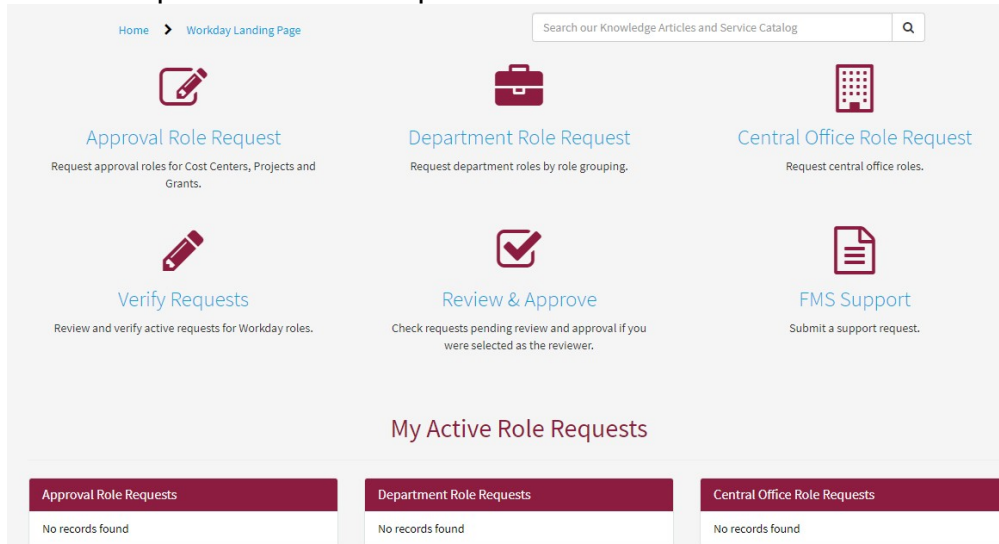


5. Then choose Workday Role Requests

[Workday Role Requests](#) ↗

FMS Role Request Landing Page

6. Select “Department Role Request”



7. Once selected, certain fields will autofill. Only fill out those highlighted with a red star. Choose the Department Technology Security Review role.
8. The requester will receive notification once approved.

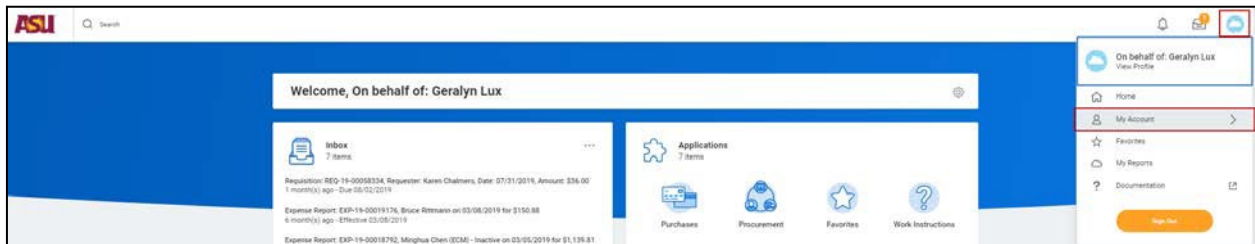
Signing in to Workday/FMS

1. Access My ASU
2. Select the Resources tab at the top of the page
3. Select Financial Management System

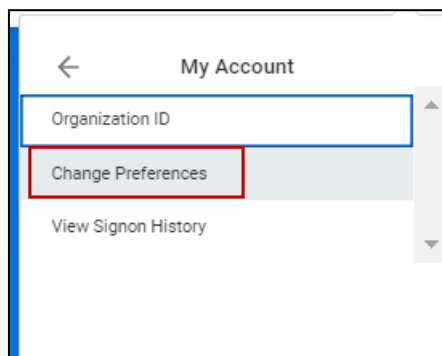
The screenshot shows the My ASU website interface. At the top, the ASU logo and navigation links are visible. The 'My ASU' header is highlighted with a red box. Below it, the 'Resources' tab is selected and highlighted with a red box. The main content area is divided into several sections: Library, Search, Training, Transportation, Financial Tools, Business and Finance, My Inbox, Request A Worktag, Create Journal Entry, Create Cash Receipt, Reporting, and STAR Budget System. The 'Financial Management System' link under the 'Financial Tools' section is highlighted with a red box.

Setting Up Preferences Steps

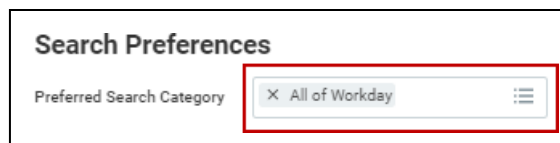
1. Once you have signed into the FMS system, click on the **Cloud** in the upper right-hand corner of the screen and select **My Account**.



2. Select **Change Preferences**.



3. Under the **Search Preferences** header, select **All of Workday** as your **Preferred Search Category**.



4. Under the **Channel** section, select **Email** and set the below **Parent Notification Type: Business Processes** notifications to **Immediately**. Click **OK**.

By doing this, you will receive an email when a requisition has been routed to you for review.

- Notification Type: Approvals

- Notification Type: Tasks
- Notification Type: To-Do's

The screenshot shows a configuration window titled "Channel" with a "Parent Notification Type" of "Alerts". On the left, a sidebar lists notification channels: "Email" (highlighted with a red box), "Mobile Push Notification", and "Pop-up notification". The main area is divided into two sections: "Alerts" and "Business Processes".

Alerts Section:

- Notification Type: Anniversaries, Frequency: Daily
- Notification Type: Birthdays, Frequency: Daily
- Notification Type: General Notifications, Frequency: Immediately
- Notification Type: Time Off, Frequency: Daily

Business Processes Section:

- Notification Type: Approvals, Frequency: Immediately (highlighted with a red box)
- Notification Type: Custom Business Process Notifications, Frequency: Immediately
- Notification Type: Delegation Notifications, Frequency: Daily
- Notification Type: Reassign Notifications, Frequency: Immediately
- Notification Type: Tasks, Frequency: Immediately (highlighted with a red box)
- Notification Type: To-Dos, Frequency: Immediately (highlighted with a red box)

At the bottom, there are "OK" and "Cancel" buttons, with "OK" highlighted by a red box.

5. Click **Done** on the **Change Preferences** review screen.

The screenshot shows the ASU Change Preferences interface. At the top left is the ASU logo, and at the top right is a search bar. Below the header is a blue banner with the title "Change Preferences" and the user name "glux1 / Geralyn Lux" next to an "Actions" button. The main content area is divided into three sections: "Global Preferences", "Search Preferences", and "Account Preferences".

Global Preferences	
Default Locale	English (United States) - en_US
Default Display Language	English
Preferred Display Language	English
Default Timezone	GMT-07:00 Mountain Standard Time (Phoenix)
Default Hour Clock (from Locale)	12 hour
Default Currency	USD

Search Preferences	
Preferred Search Category	(empty)

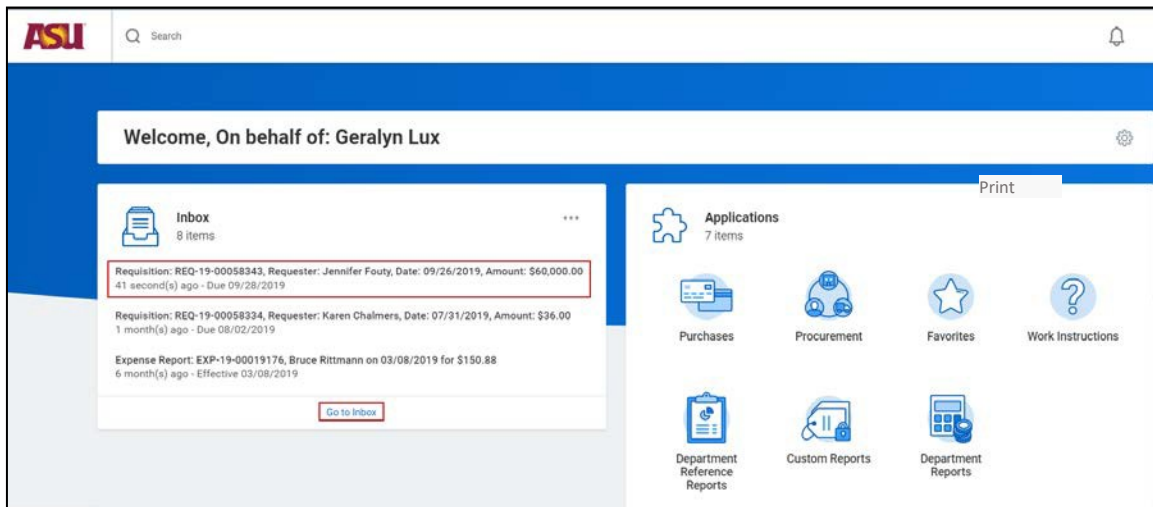
Account Preferences	
Preferred Home Page	(empty)

At the bottom left, there is a "Simplified View" link and a prominent orange "Done" button, which is highlighted with a red rectangular box. To the right of the "Done" button, there is a faint "Submit for prompts" label.

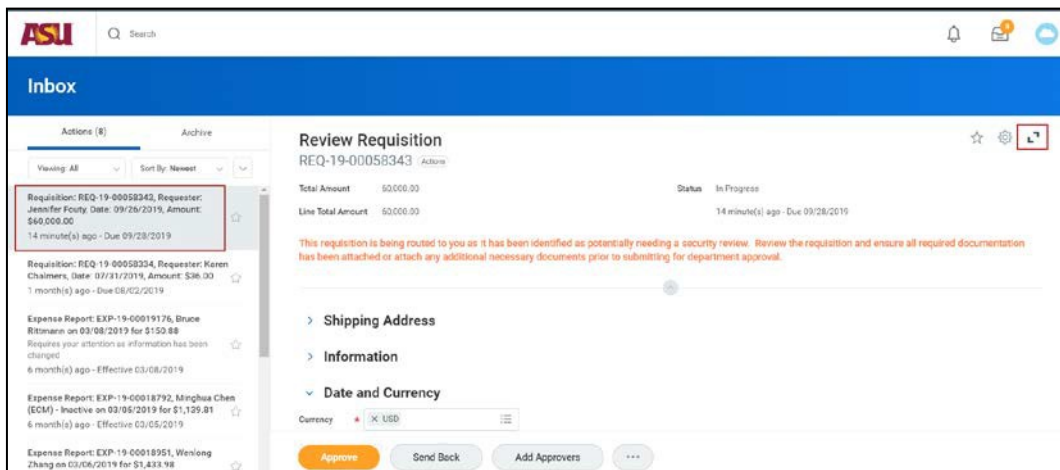
Requisition Review Steps

When a requisition has been submitted requiring your review, you may access the requisition by either clicking on the link from the email notification or from your inbox within FMS. For the purpose of this guide, we will be accessing the requisition from the inbox.

1. From the FMS homepage, select the requisition from the **Inbox** summary or click on the **Go to Inbox** link.



2. Click on the requisition you want to review from the **Actions** section on the left-hand side of the screen. Additionally, you may select on the toggle in the upper right-hand side of the **Review Requisition** screen to see the requisition in full view.



- **Note:** Information text appears in orange so you are aware of the reason you are receiving the requisition for review

Review Requisition ☆ ⚙️ ↻

REQ-19-00058343 (Actions)

Total Amount	60,000.00	Status	In Progress
Line Total Amount	60,000.00		25 minute(s) ago - Due 09/28/2019


This requisition is being routed to you as it has been identified as potentially needing a security review. Review the requisition and ensure all required documentation has been attached or attach any additional necessary documents prior to submitting for department approval.

3. Expand the **Information** section to review any **Memo to Suppliers** or **Internal Memo** information.

⏷ **Information**




Company	Arizona State University
Requester	* Jennifer Fouty
Credit Card	<input style="width: 100%;" type="text"/>
Requisition Type	x Information Security
High Priority	<input type="checkbox"/>
Sourcing Buyer	<input style="width: 100%;" type="text"/>
Submitted by	Jennifer Fouty
Consolidate Requisitions on Purchase Orders	<input type="checkbox"/>
Exclude Ship-To Address when Consolidating Requisition Lines	<input type="checkbox"/>
Memo to Suppliers	Please include PO number on all invoices and forward invoice to UTOPurchasingRequest@asu.edu.
Internal Memo	Bid Waiver dated 4/29/15 This is a monthly recurring invoice for our Enterprise Service for Website and Network Security.

- Review the **Goods** or **Services** line detail to note what is being purchased and what supplier it is being purchased from.

Goods							
1 item							
+	Image	Item	Item Description	Supplier Item Identifier	Purchase Item	*Spend Category	Fulfillment Source
-		Item	Cloudflare Enterprise Service For Website and Network Security	Enterprise Service		Access management services	Purchase Order

Services							
0 items							
+	Image	Item	Description	*Spend Category	Fulfillment Source	Supplier	Tax
No Data							

- Expand the **Attachments** section and review any documentation attached.

Attachments	
	<p>Security Review Form-js_2.pdf <small>Uploaded by Jennifer Fouty</small></p> <p>External <input type="checkbox"/></p> <p>Comment <input type="text"/></p> <p style="text-align: right;"><small>49 minutes ago</small></p>
	<p>ISO Security Review Summary.pdf <small>Uploaded by Jennifer Fouty</small></p> <p>External <input type="checkbox"/></p> <p>Comment <input type="text"/></p> <p style="text-align: right;"><small>49 minutes ago</small></p>
	<p>7-23-2015 Network Comm.UTO Bid Waiver.pdf <small>Uploaded by Jennifer Fouty</small></p> <p>External <input type="checkbox"/></p> <p>Comment <input type="text"/></p> <p style="text-align: right;"><small>49 minutes ago</small></p>
<input type="button" value="Upload"/>	

6. If additional steps are needed prior to allowing the purchase to go through, make note of this in the **Comments** section at the bottom of the requisition, then select the **Related Actions** button and **Save for Later**.
 - If no additional steps are needed, and the purchase is allowed to move forward, click **Approve**.

Note: By clicking Approve, you are stating that you have done your due diligence in conducting the review to ensure the security of ASU systems and data.

The screenshot shows a requisition review interface. At the top, there is a text input field with a placeholder text "Add information related to the next steps and Save for Later", which is highlighted with a red box. Below this is a "Process History" section. The history includes several steps: "Karen Chalmers" (Requisition Event - Step Completed, Due 10/01/2019), "Approval by Central Accountant (ASU) - Not Required", "Integration: INT184_WIDs_To_MuleSoft_Studio - Not Required", and "Check Budget - Not Required". The current step is "Geraldyn Lux" (Review Requisition - Awaiting Action, Due 09/26/2019). At the bottom, there are four buttons: "Approve" (highlighted with a red box), "Send Back", "Add Approvers", and a "More" button (three dots, highlighted with a red box). A dropdown menu is open from the "More" button, showing options: "Save for Later" (highlighted with a red box), "Edit Worktag Defaults", and "Cancel".

7. Once you have clicked Approve, the **Success! Event approved** screen will appear. Click **Done**.

