Department Technology Security Reviewer Guide

Business Process Overview

This provides guidance to the Department Technology Security Reviewer on:

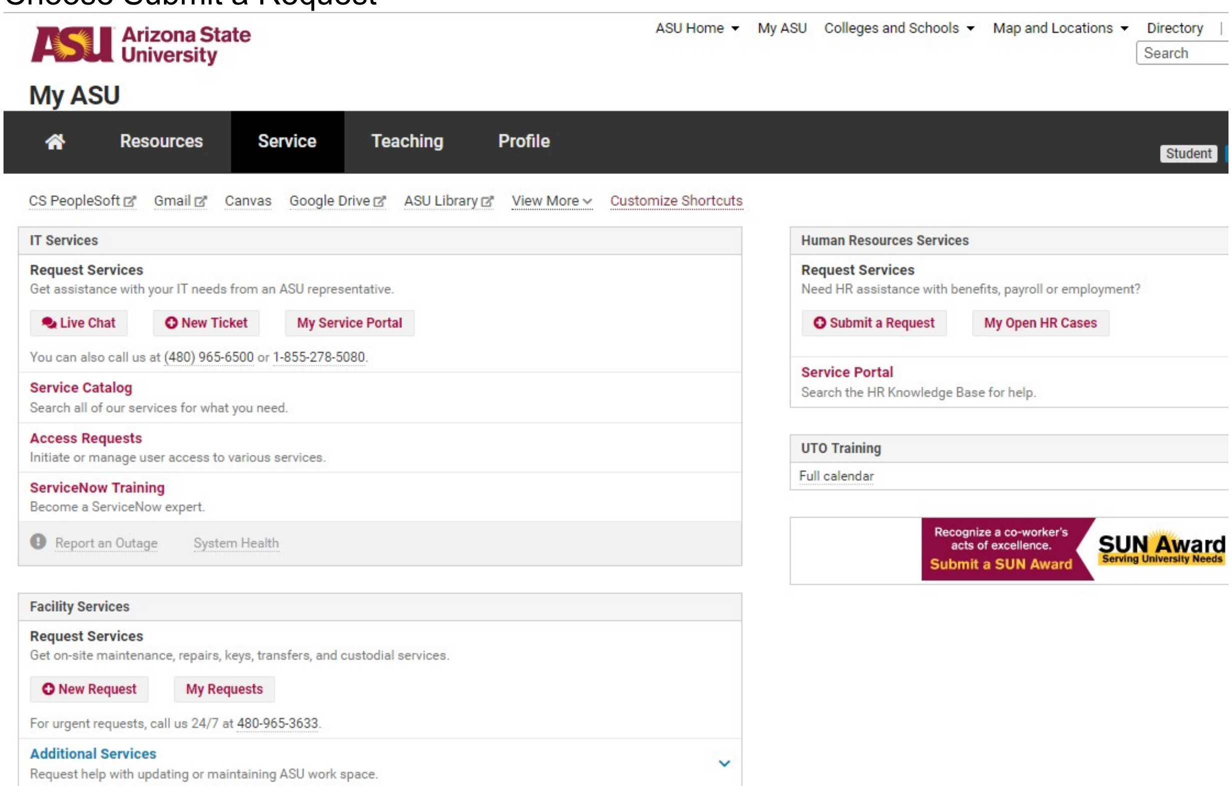
- How to request the required role
- How to change their FMS profile preferences related to notifications
- How to review and approve requisitions

Business Process Pre-requisites

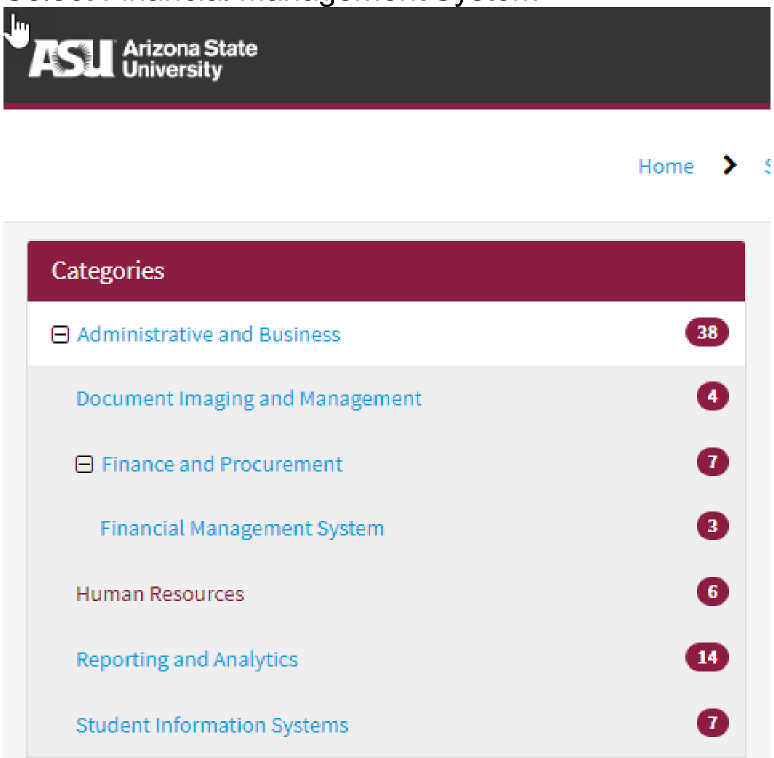
- Complete the TAG Certification training
- Submit request for the Department Technology Security Review role

Obtaining the required Role in FMS

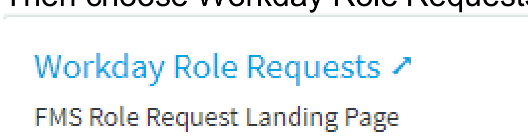
1. Access My ASU
2. Select the Service tab at the top of the page
3. Choose Submit a Request



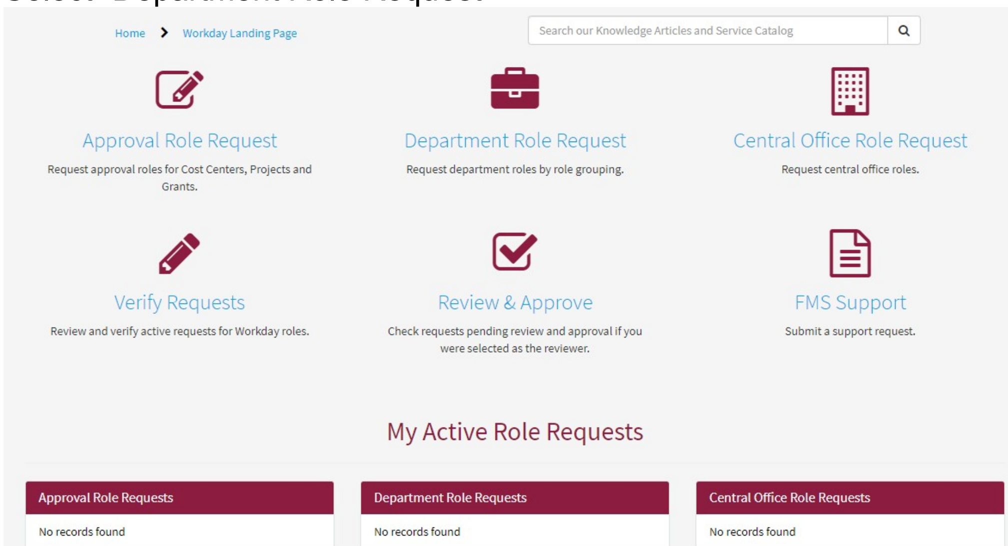
4. Select Financial Management System



5. Then choose Workday Role Requests



6. Select “Department Role Request”

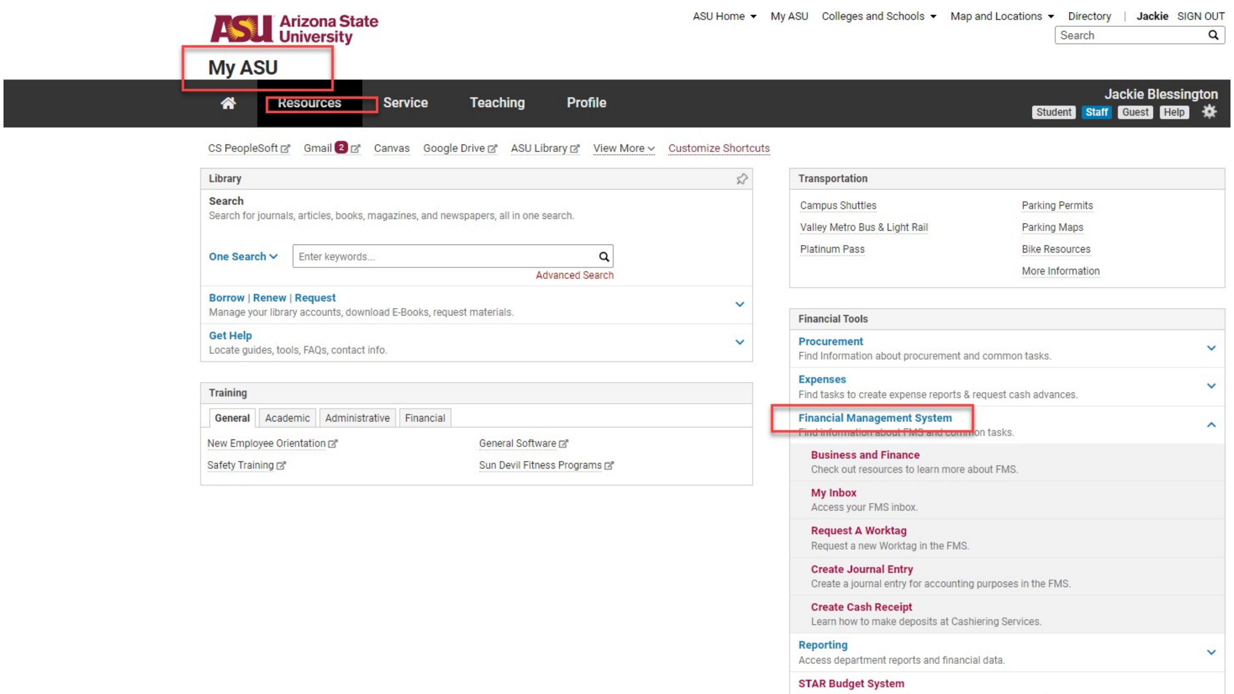


7. Once selected, certain fields will autofill. Only fill out those highlighted with a red star. Choose the Department Technology Security Review role.

8. The requester will receive notification once approved.

Signing in to Workday/FMS

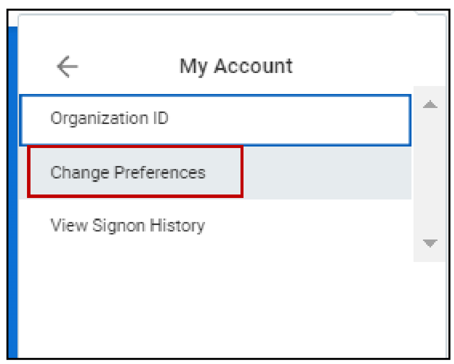
1. Access My ASU
2. Select the Resources tab at the top of the page
3. Select Financial Management System



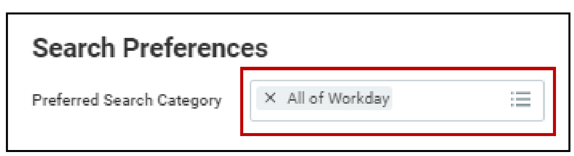
Setting Up Preferences Steps

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**.

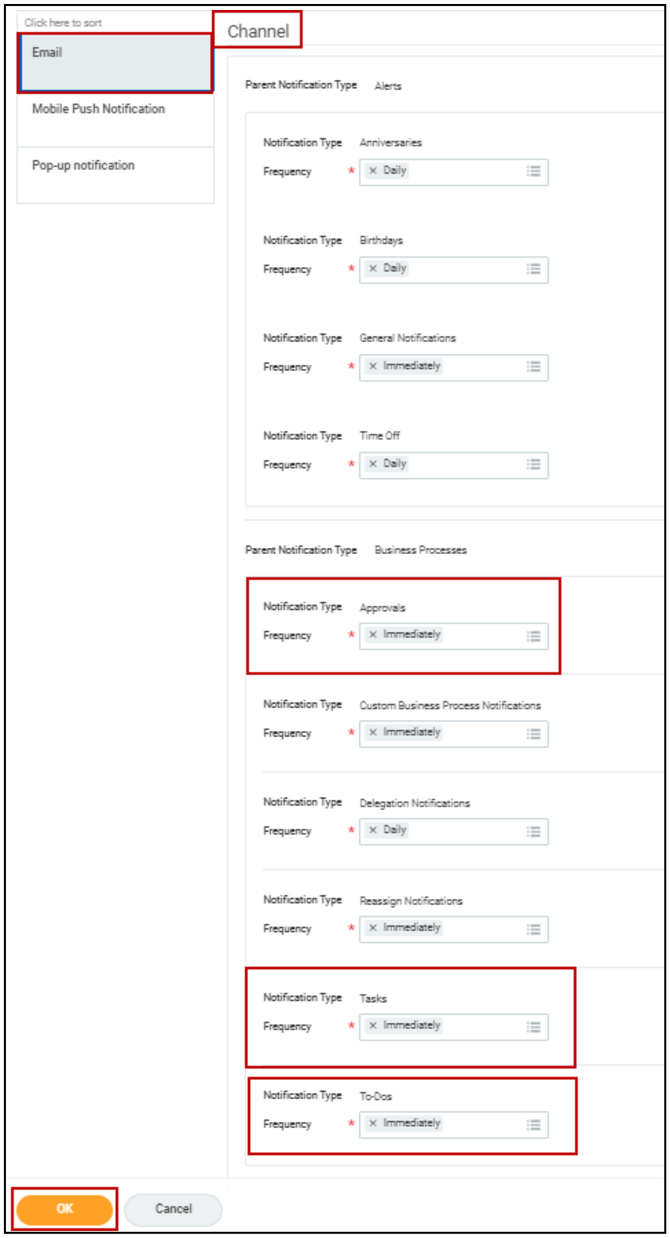


4. Under the **Channel** section, select **Email** and set the below **Parent Notification Type: Business Processes** notifications to **Immediately**. Click **OK**.

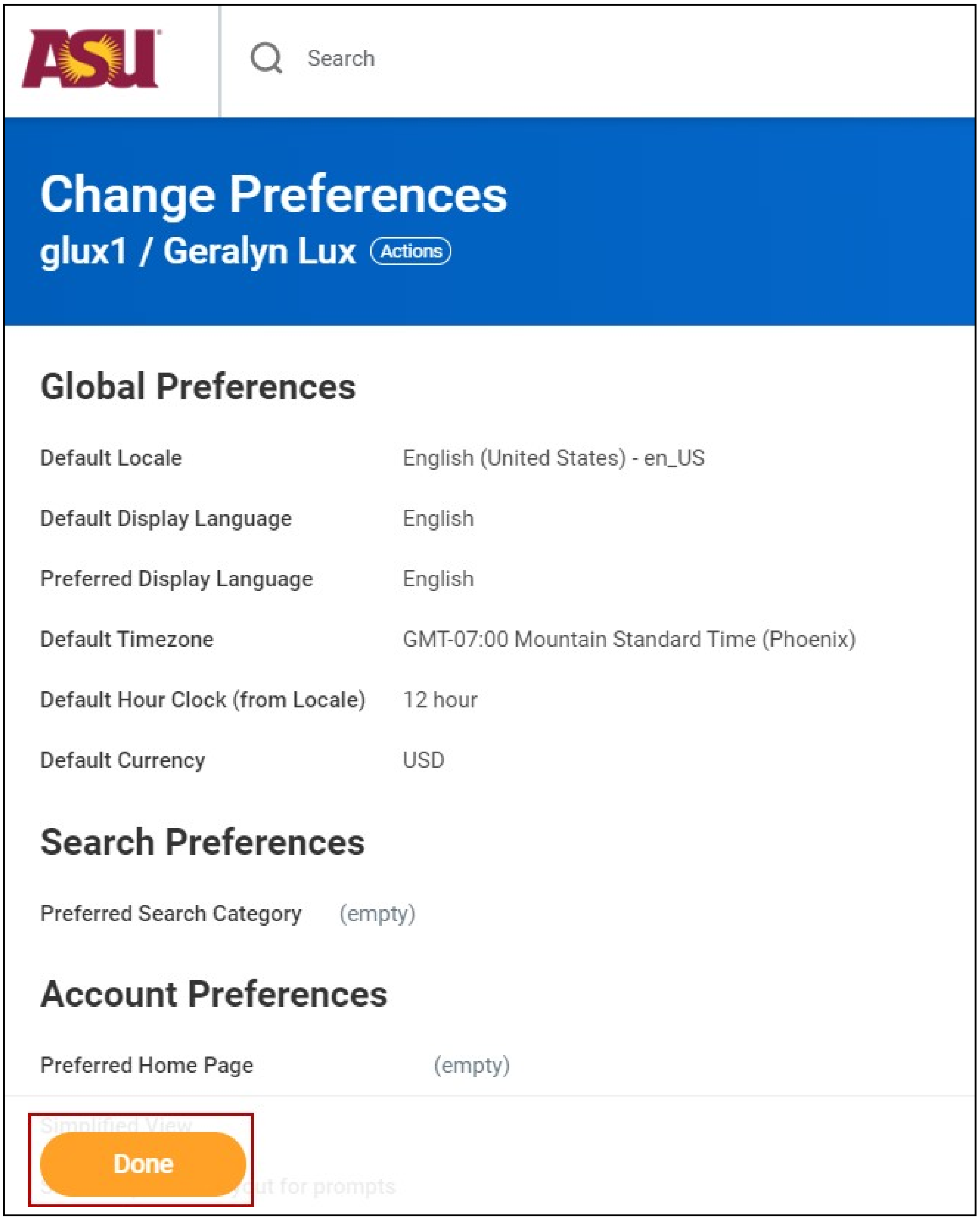
   By doing this, you will receive an email when a requisition has been routed to you for review.

   - Notification Type: Approvals

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



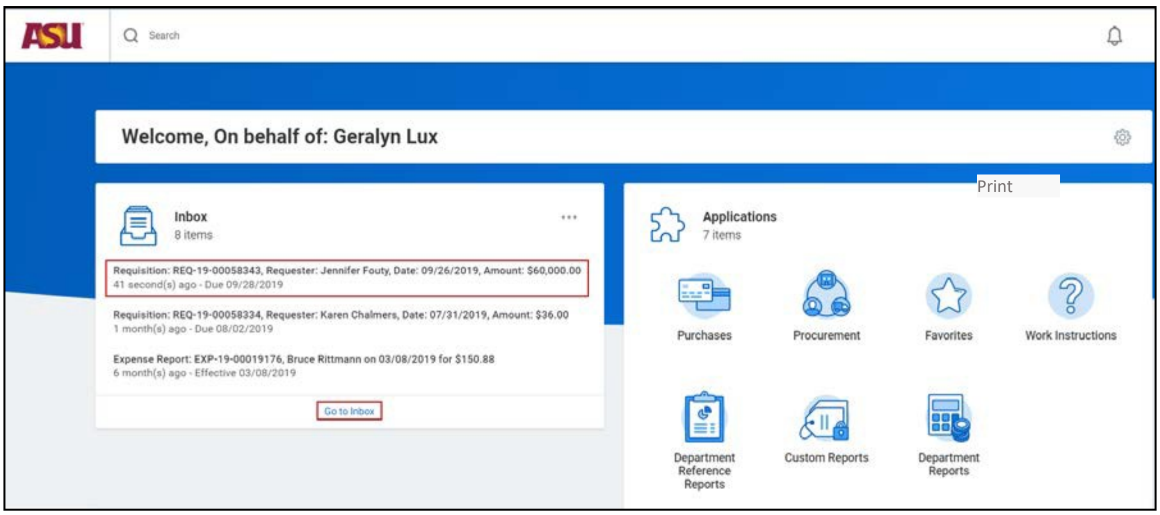
5. Click **Done** on the **Change Preferences** review screen.



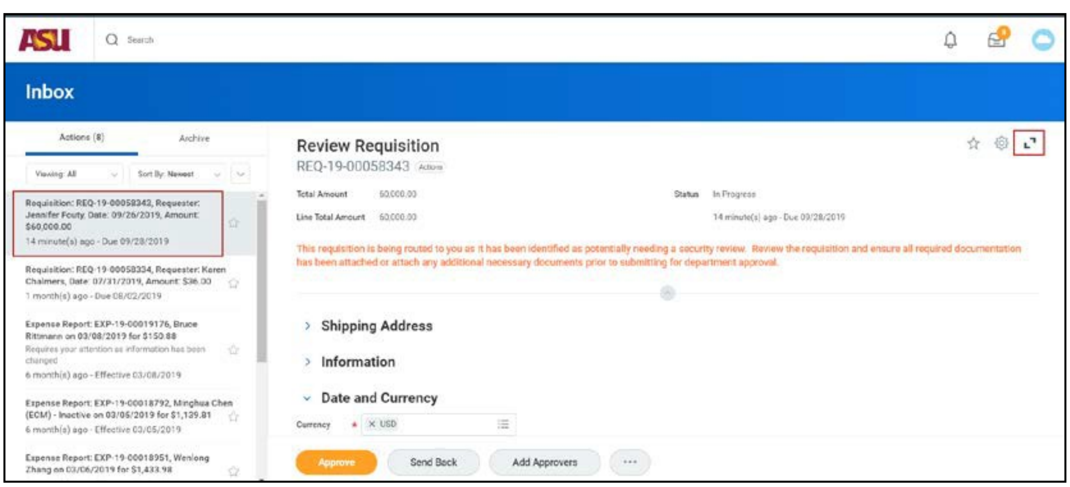
Requisition Review Steps

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.

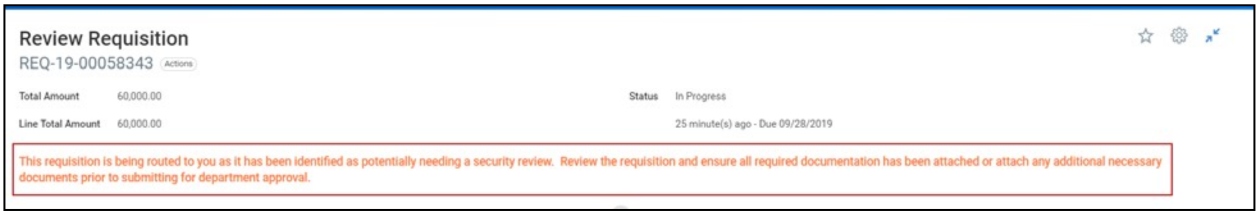
1. From the FMS homepage, select the requisition from the **Inbox** summary or click on the **Go to Inbox** link.



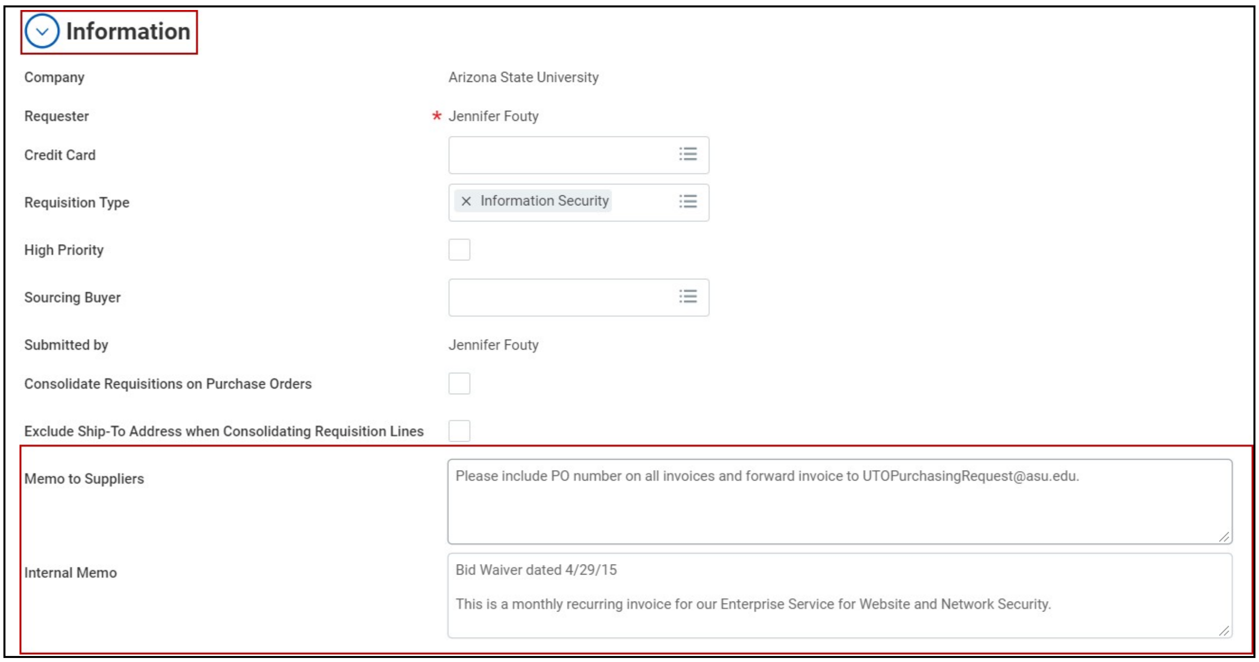
2. Click on the requisition you want to review from the **Actions** section on the left-hand side of the screen. Additionally, you may select on the toggle in the upper right-hand side of the **Review Requisition** screen to see the requisition in full view.



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



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

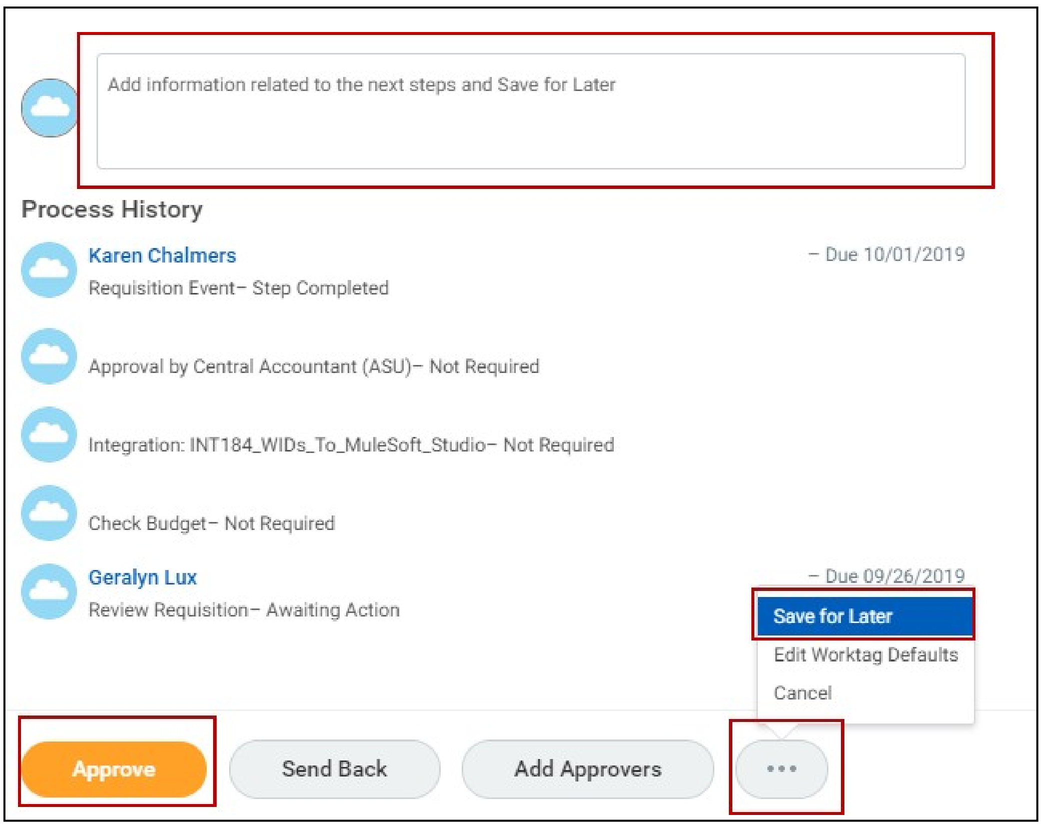


4. Review the **Goods** or **Services** line detail to note what is being purchased and what supplier it is being purchased from.

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

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.



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