

HRMS (HCM, BI, Portal) Professional Access Request Process

Agency:

1. Identifies need for new or changed HRMS professional user access.

HRMS Professional Access Request form **is needed** for at least one of the following reasons:

- a. HCM position needs roles added or removed.
- b. Employee needs BI access created, updated or removed.
- c. Employee transfers to another agency or withdraws from state service and access needs to be removed **prior** to the transfer or separation date.
- d. Employee is changed to Inactive status: follow your agency policy as to whether or not to remove HCM or BI professional access.

HRMS Professional Access Request form **is not needed** when:

- a. Employee transfers from one professional HCM position to another in the same agency.
- b. Employee transfers from professional HCM position to non-professional position unless BI Access is to be maintained.
- c. New or existing non-professional user is assigned to a professional HCM position. This includes employees transferring from another agency.
- d. Employee transfers to another agency or withdraws from state service and access needs to be removed **prior** to the transfer or separation date.
- e. MSS Leave Approver role needs to be assigned or removed from the Manager position (Only for agencies that use ESS Online Leave Tool)
- f. Updates to SNC entry for Single Sign-On (SSO) agencies.
- g. Professional user needs a password.

Note: HRMS Security performs regular reviews of user accounts. Accounts found that do not meet established security standards will be corrected by HRMS Security. Reviews employee position.

2. Completes the HRMS Professional Access Request form.

- a. If the **same role change** is being made on many positions or employees, you can complete one form, include in comments "See attached for positions / employees", and send spreadsheet with list of positions or employees to be changed.

Review the HRMS Role Definition Handbook or contact the WaTech Support Center for assistance from the HRMS Security team if not sure what roles to assign.

3. Reviews HRMS Professional Access Request form for completeness, accuracy and Segregation of Duties issues.
4. Approves HRMS Professional Access Request form following agency defined approval process.
 - a. WaTech does not verify that the form was approved by the appropriate agency approver. It is assumed the agency HRMS Security Requestors have followed their agency HRMS approval process.
5. HRMS Professional Access Request form is submitted to Support@WaTech.wa.gov by an agency HRMS Security Requestor. If the request is an emergency, please refer to the Emergency Request Process for the authorized criteria for submitting as an emergency and the process to follow.
 - a. The form must be sent from a work e-mail of an agency Security Requestor who is on the HRMS Security approved contact list.
 - b. If other agency Security Requestors or Security Contact Authorizers should be included in e-mail communications, this information must be included in the email request.
 - c. The subject line in the e-mail should read – **Professional User Security Request**

WaTech Support Center:

6. Creates a ticket for HRMS Security.

WaTech HRMS Security Team:

7. Reviews the HRMS Professional Access Request form:
 - a. Received from an approved agency Security Requestor
 - b. Form completeness
 - c. Current role assignments for discrepancies
 - d. License issues when adding new Professional Users (Appendix A - License Review Process)
8. Contacts agency HRMS Security Requestor if clarification is needed or form is not complete.
 - a. If there are any changes to the original request:
 - Agency Security Requestor will send in a revised form **OR**
 - HRMS Security will document the changes in the internal comments section with the agreed upon changes.
9. Completes the request.
10. E-mails the agency Security Requestor when the request is complete.

Appendix A – License Review Process

HRMS Security Team:

1. Confirms the number of agency's professional user licenses (HCM + BI).
2. Confirms the agency's license allocation.
3. If the agency is within their license allocation the request will be completed.

Note: Every six months, HRMS Security will audit agency's professional users to identify users who have not logged in during the past 12 months. If users are identified, HRMS Security will notify the agency Security Requestor(s) that we will be removing the roles from positions or deleting the accounts.

If the request brings the agency license count above the number of allocated licenses:

4. Provides the agency Security Requestor with the following information to help identify possible ways to reduce agency license count:
 - a. Logon information for current professional users to help identify users who may not be utilizing their accounts
 - b. Double-filled positions that have professional roles assigned

If there are licenses available:

5. May approve access as long as there are excess licenses available with the understanding that these licenses could be removed if future license audits show an overage.

If there are no licenses available:

6. Will review license assignments and work with the agency to try to reduce the number of licenses assigned. If a reduction is not possible, we will attempt to identify allocated licenses that are not being used in other agencies and may ask to delay the requested license assignment.

Agency:

7. Decides to:
 - a. Continue with the understanding that these licenses could be removed if future license audits show an overage
 - b. Continue and submits an additional request for removal of professional user access
 - c. Cancel the request

Revision History:

Date	Changed by	Description of Change & Reason
09/20/2010	Julia C. Washburn	Added revision history table.
06/22/2012	Julia C. Washburn	Updated the section about when the form is needed. Replaced all instances of DOP with DES.
09/10/2015	Vivian Nelson	Updated reference from DES to WaTech, updated wording, removed Central from reference to HRMS Security.
12/05/2016	Kammy Haddon	Updated to Support Center and minor wording updates