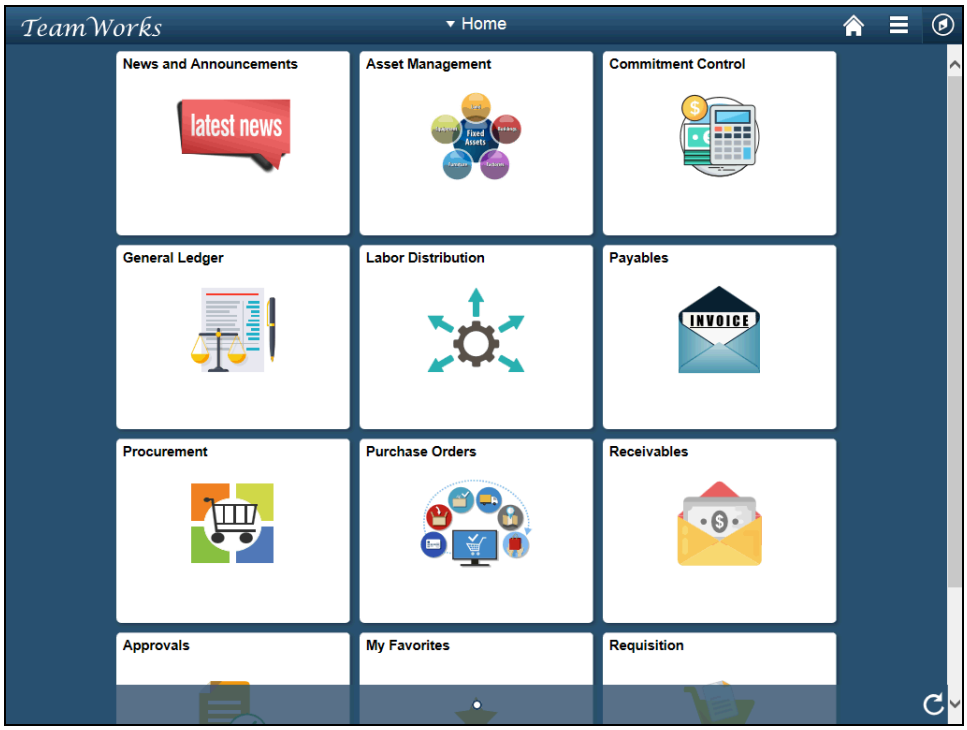
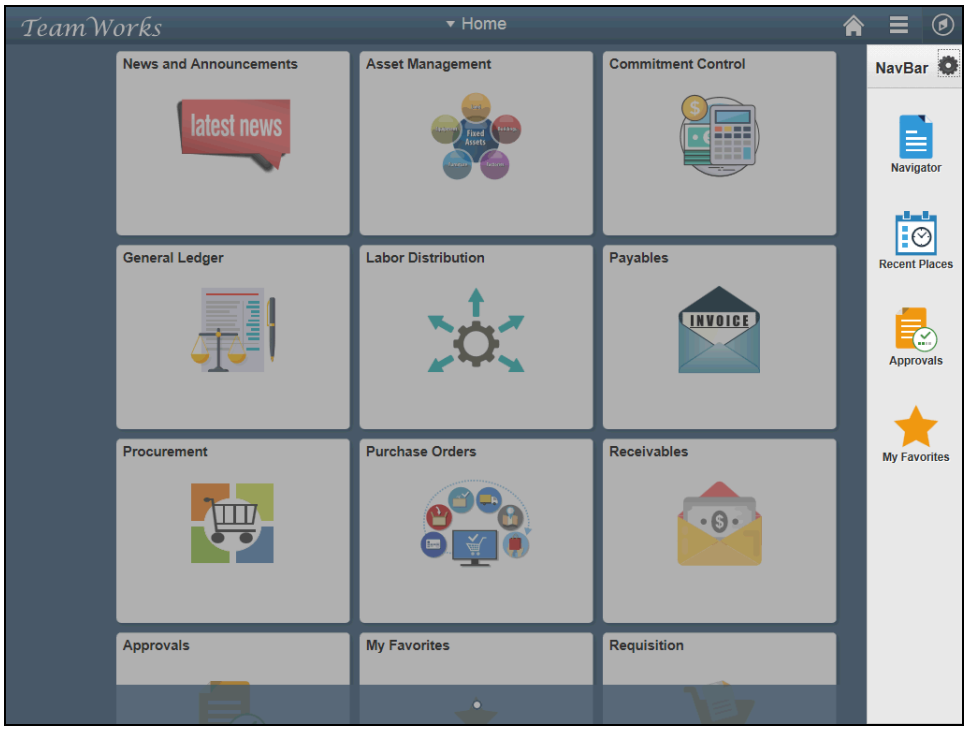
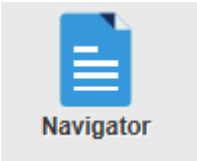
Requesting a New Security Request

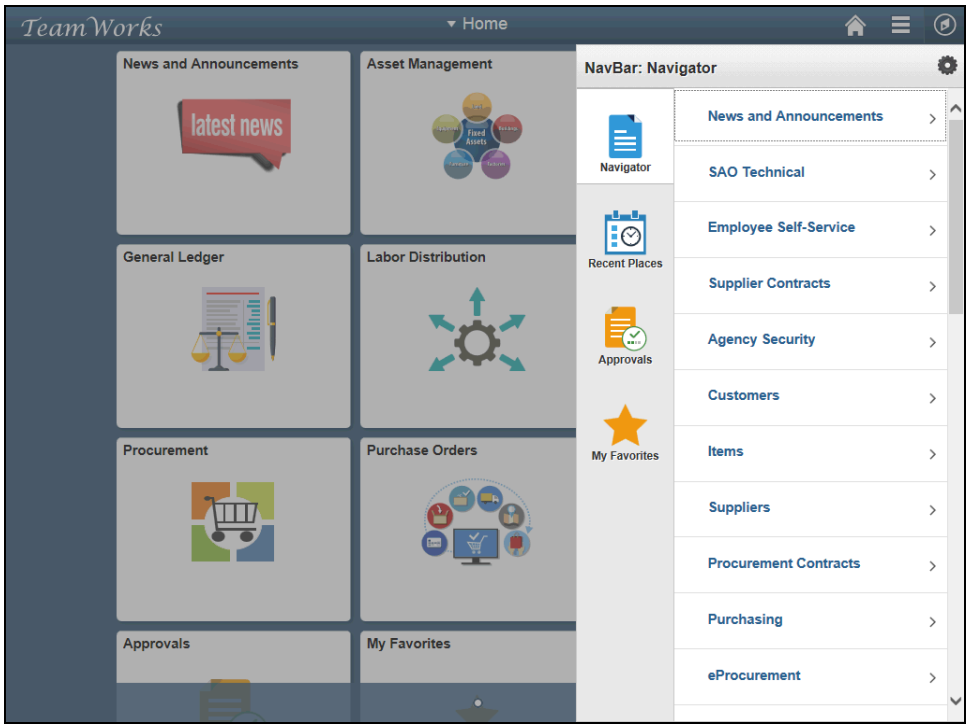
Below are the process steps to Requesting a New Security Request. As you are performing the task, use this document to be a Step-by-Step guide for completing this process. At the end, please click the link to complete a quick survey as to the usefulness of this document.



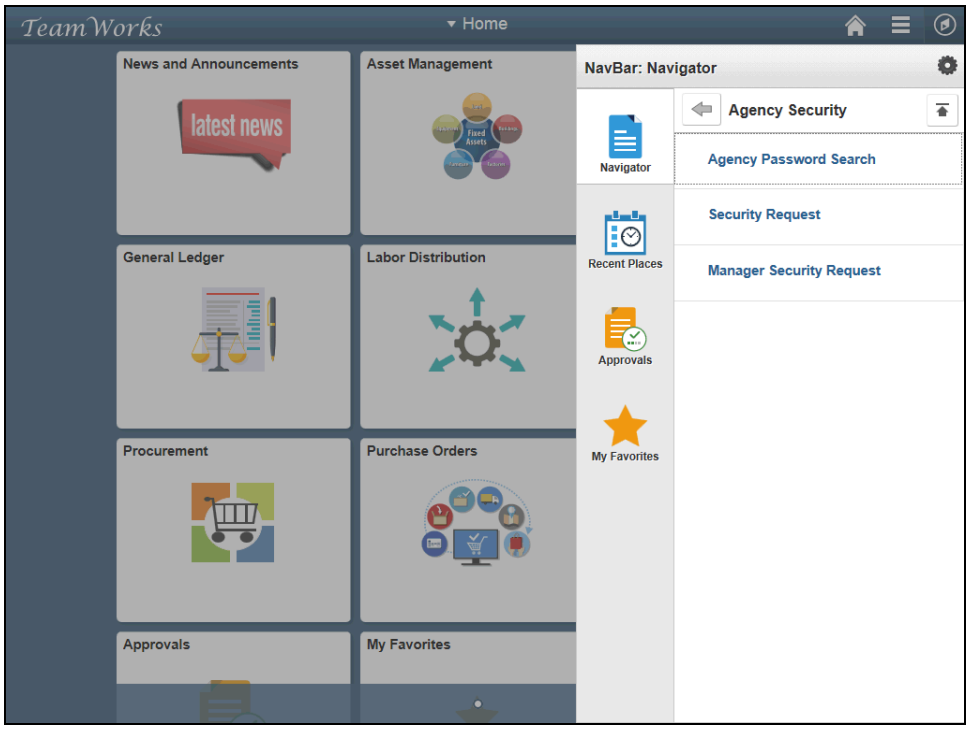
Step	Action
1.	Begin by navigating to the **Manager Security Request** page. **Note:** This simulation is an example of a transaction. When entering a transaction in the live TeamWorks Financials system, please select all values and options based on agency policy, the paperwork on hand and the current situation. Click the **NavBar** icon.



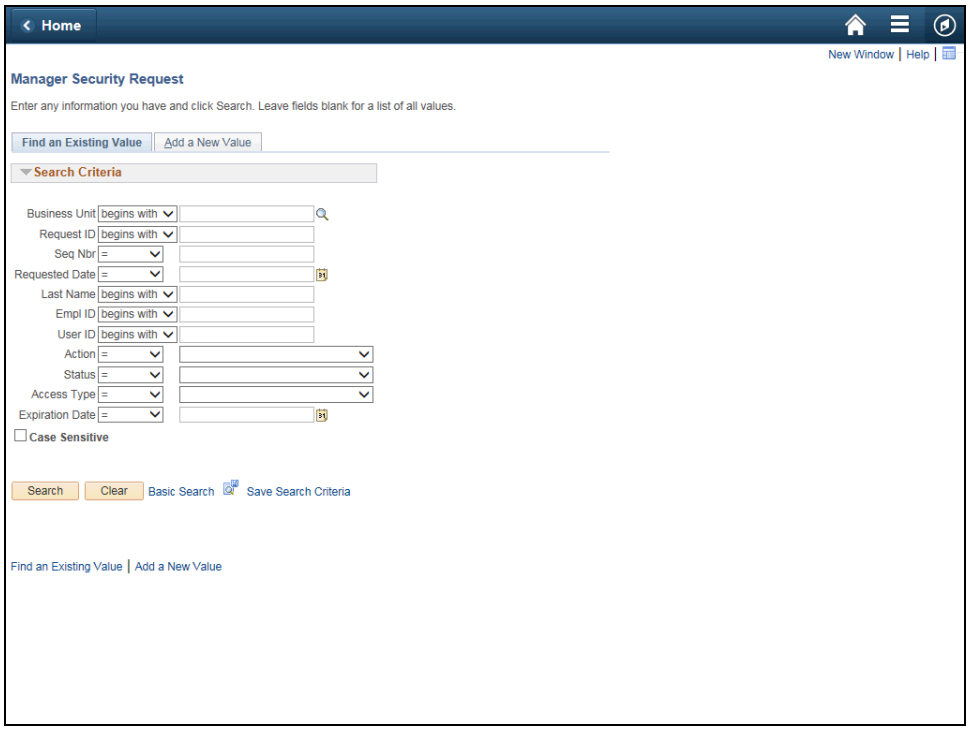
Step	Action
2.	Click the **Navigator** icon. 



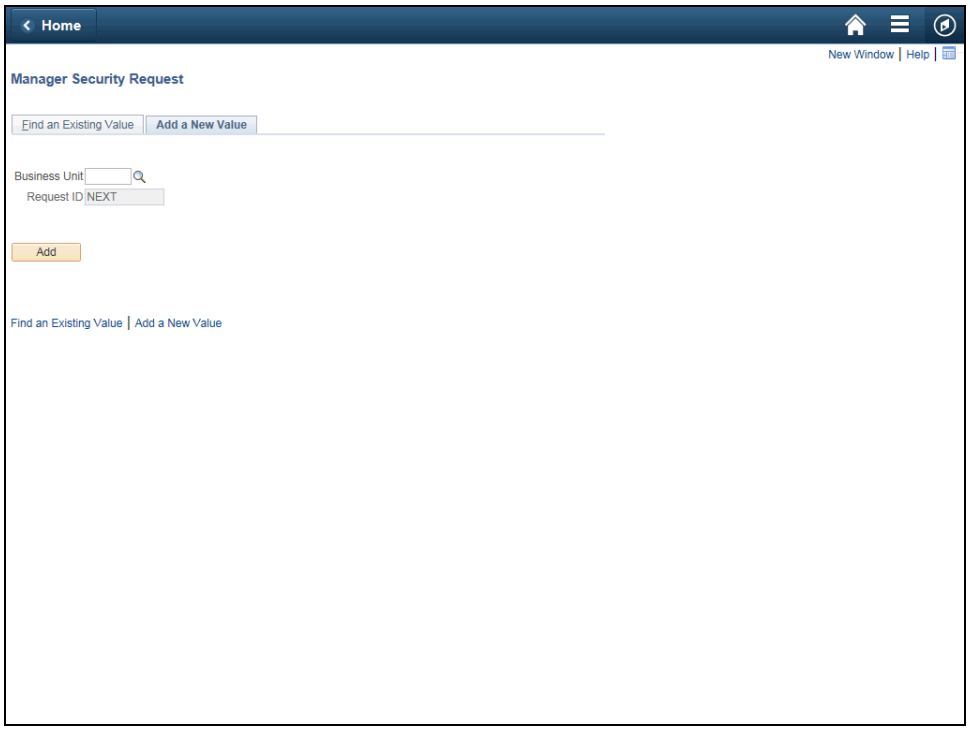
Step	Action
3.	Click the **Agency Security** link. Agency Security



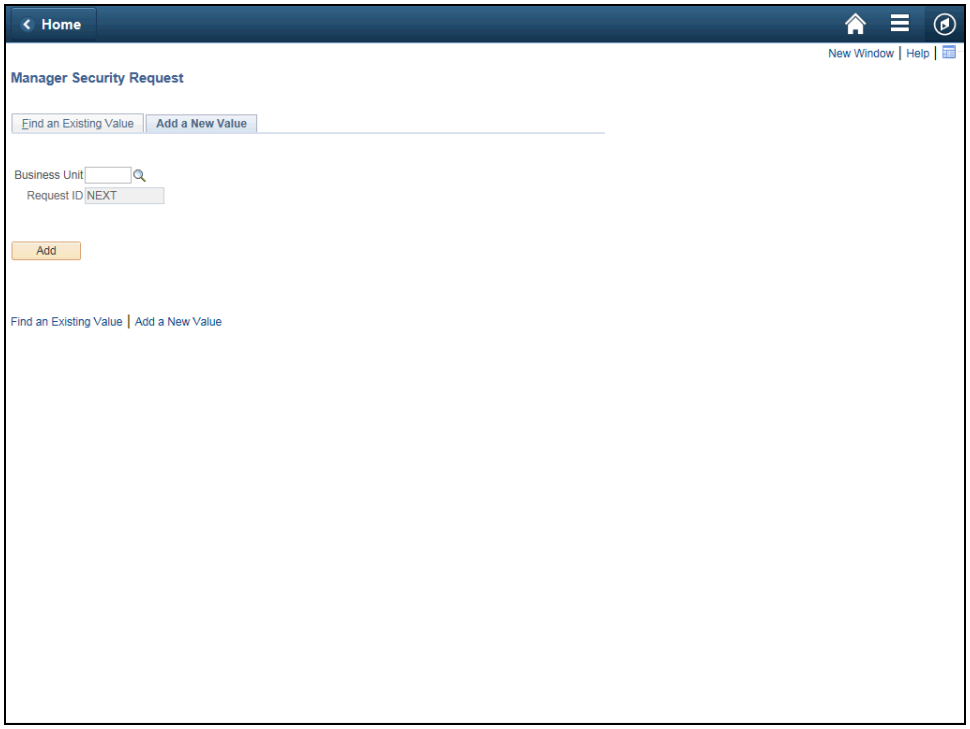
Step	Action
4.	Click the **Manager Security Request** link. Manager Security Request



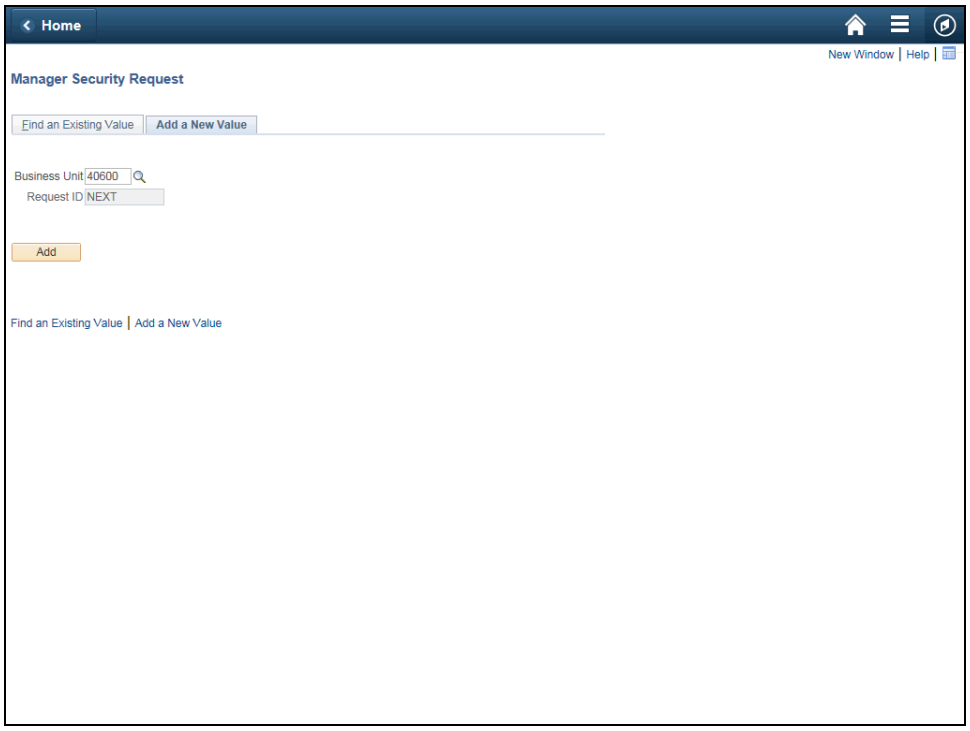
Step	Action
5.	To make addition to security access, a new security request will need to be created. Click the **Add a New Value** tab. Add a New Value



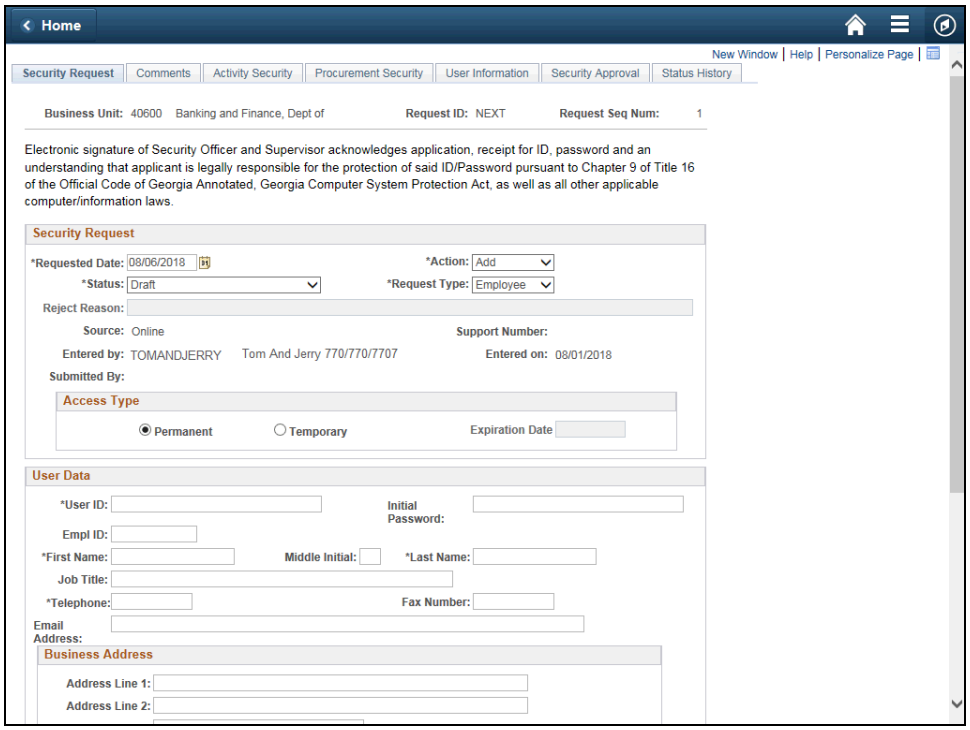
Step	Action
6.	Click in the **Business Unit** field.



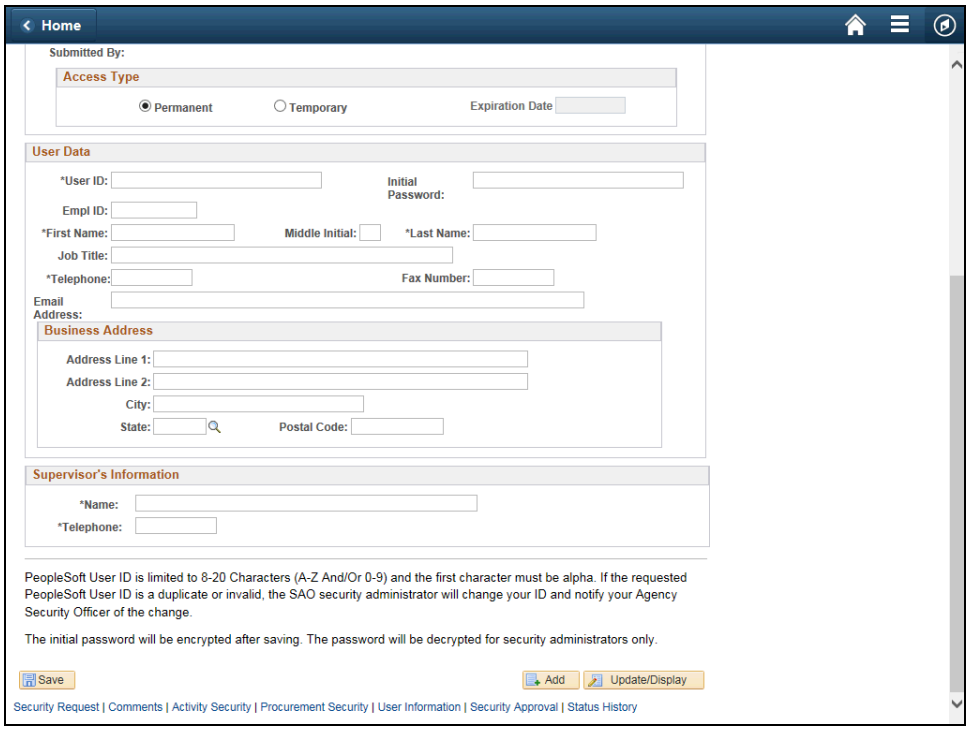
Step	Action
7.	This is an example. Be sure to input the Business Unit specific to your Agency. For this example Business Unit 40600 will be used. Enter the appropriate information into the **Business Unit** field. For this example, type **40600**.



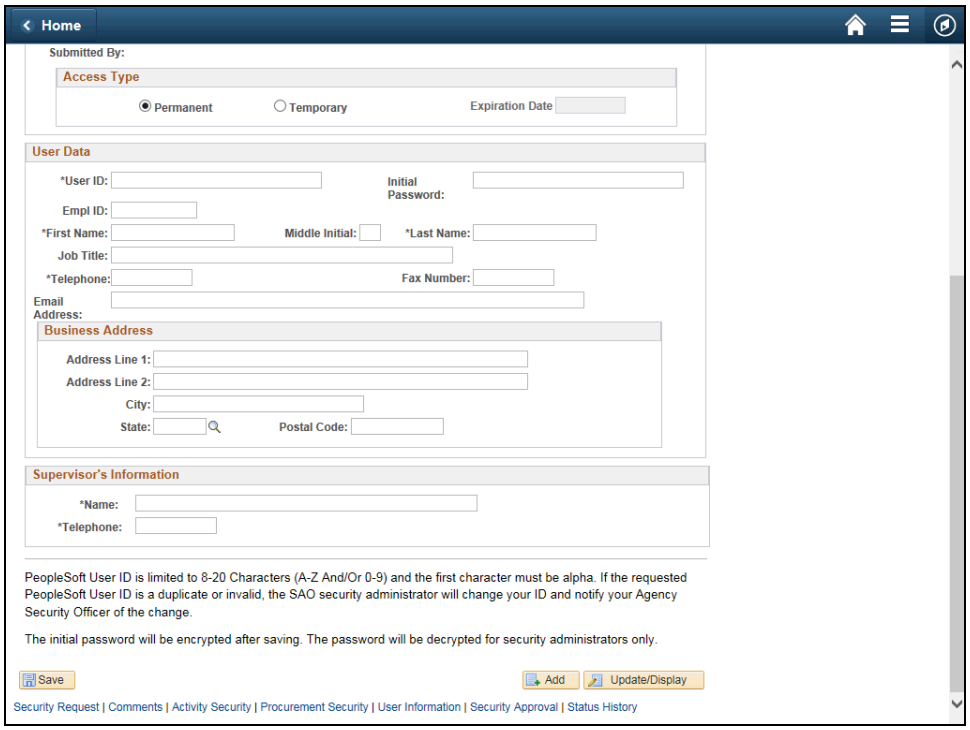
Step	Action
8.	Click the **Add** button.



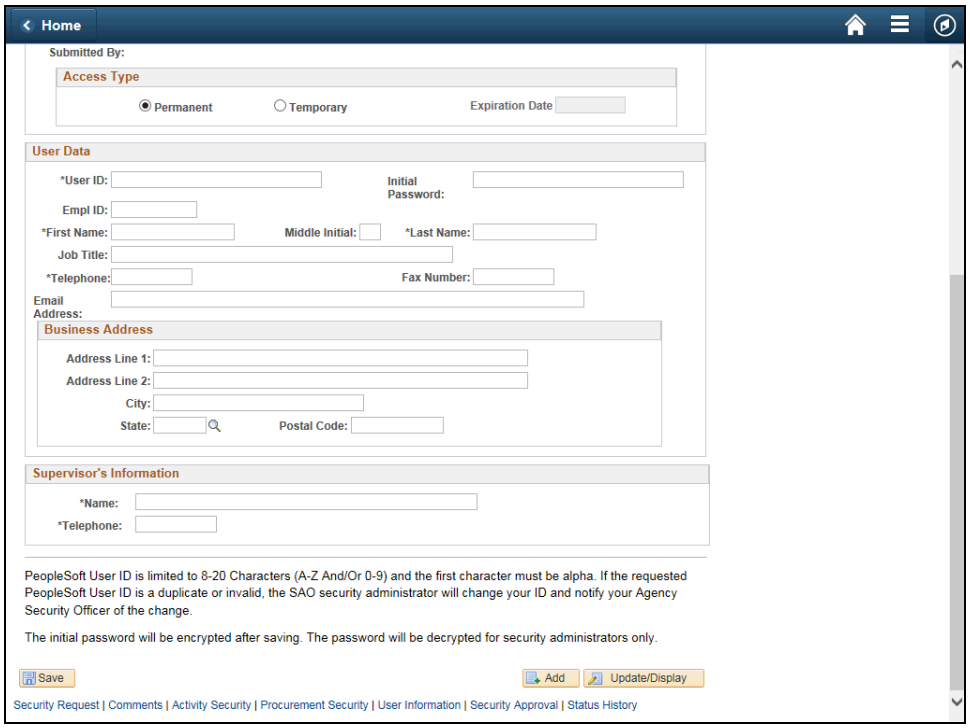
Step	Action
9.	The **Security Request** page is the page where the Manager will input all relative information for the security addition. Those items with a ***** are required. The first section includes items such as the **Request Date,** which is automatically 3 days later as that SAO requires 3 days to process a request. **Action, Status,** and **Request Type** are also items that can be changed by the user. The **Source, Entered by** and **Support Number** are automatically updated by the system. Click the **Vertical** scrollbar.



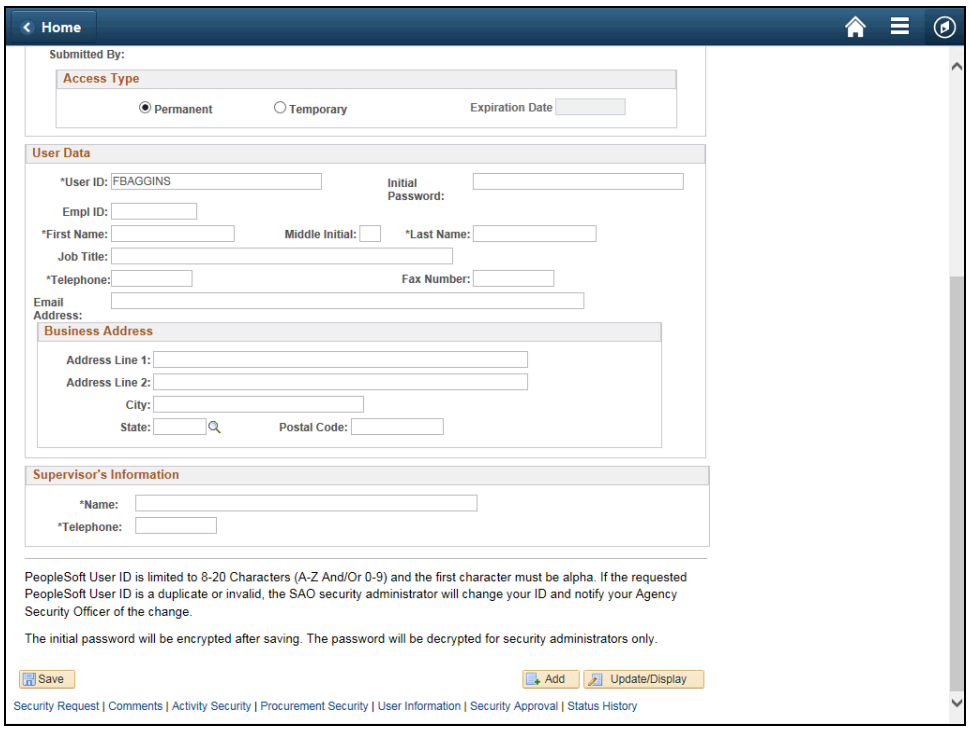
Step	Action
10.	The next section consists of user data that will need to be entered. Again, items with a ***** are required. Notice there is also a section for the **Supervisor's Information**. Click the **Vertical** scrollbar.



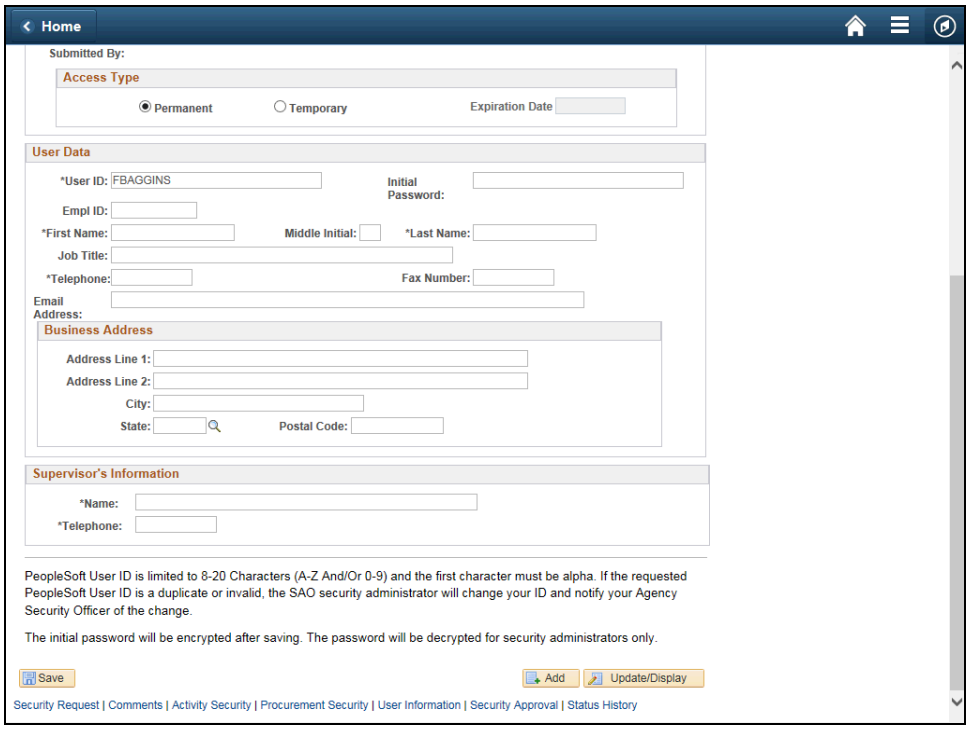
Step	Action
11.	First, enter the User ID. **User ID:** This is the Employee ID. For a contractor, the User ID is limited to 8-20 characters and the first character must be alpha. Click in the **User ID** field. *User ID:



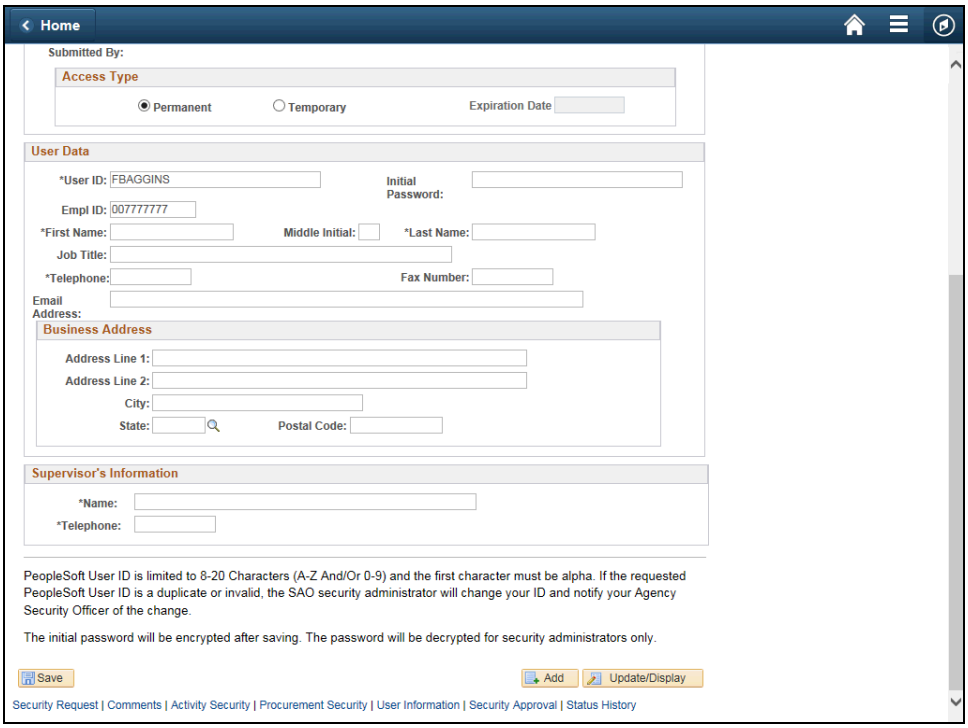
Step	Action
12.	Enter the appropriate information into the **User ID** field. For this example, type **FBAGGINS**.



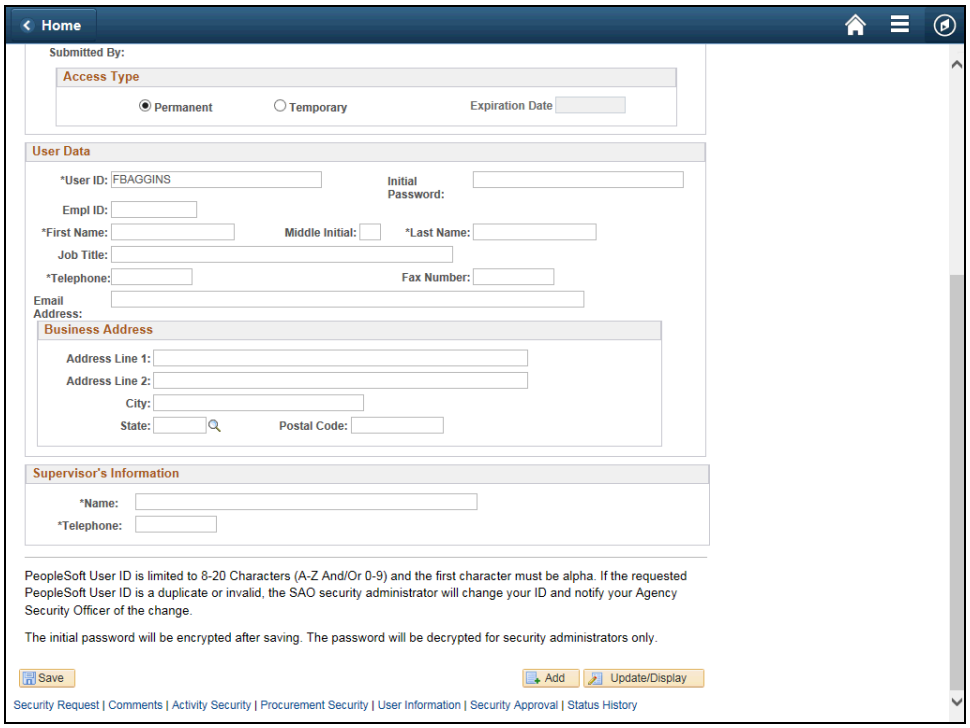
Step	Action
13.	Click in the **Empl ID** field. Empl ID:



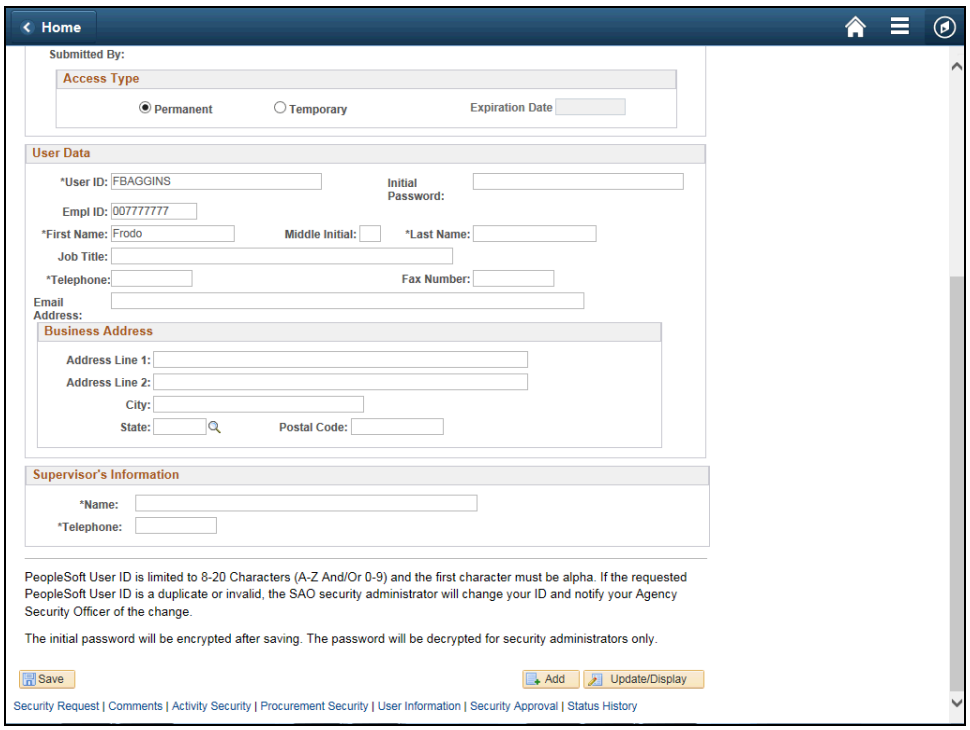
Step	Action
14.	The **Employee ID** consists of eight numeric values proceeded by 00 or 01. A contractor would not have an Employee ID. Enter the appropriate information into the **Empl ID** field. For this example, type **007777777**.



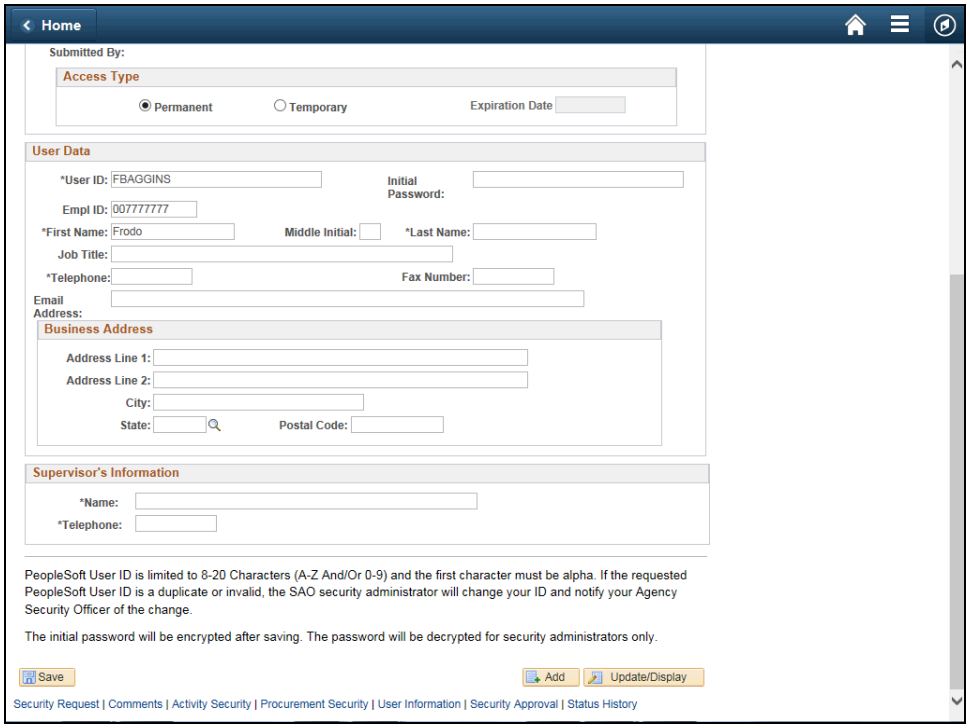
Step	Action
15.	The First Name of the user needs to be entered. Click in the **First Name** field. *First Name:



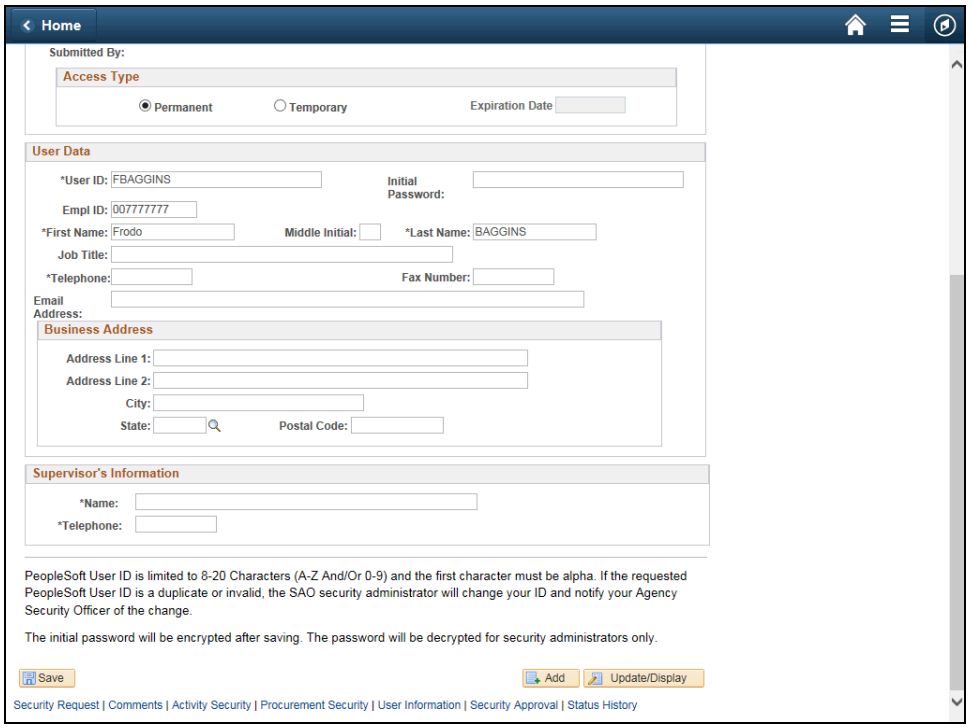
Step	Action
16.	Enter the appropriate information into the **First Name** field. For this example, type **Frodo**.



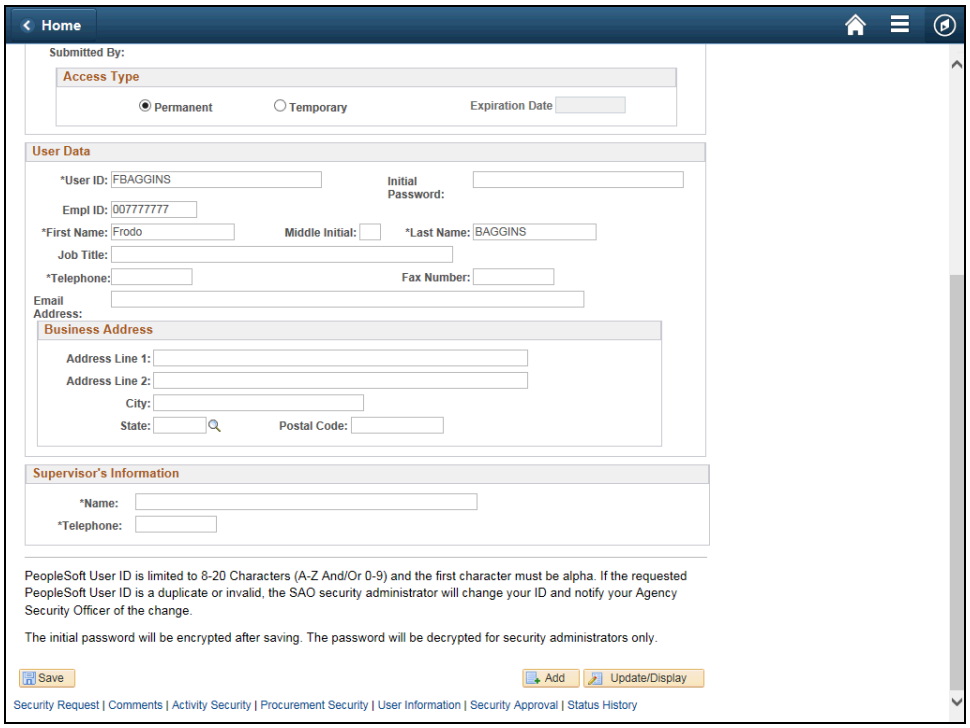
Step	Action
17.	The Last Name of the user also needs to be entered. Click in the **Last Name** field. *Last Name



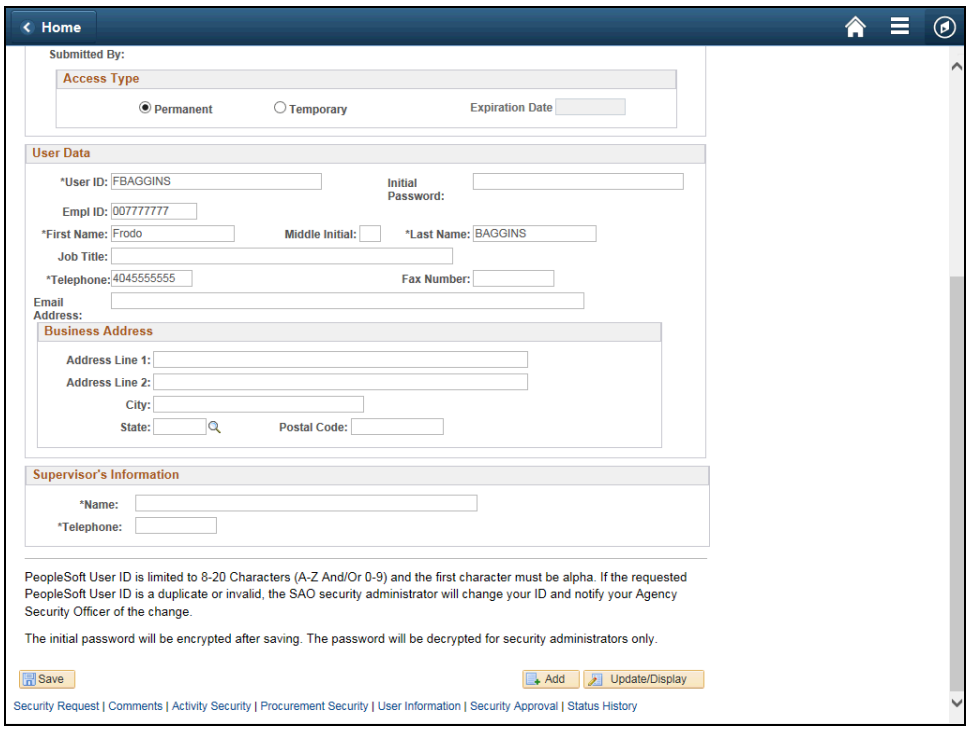
Step	Action
18.	Enter the appropriate information into the **Last Name** field. For this example, type **Baggins**.



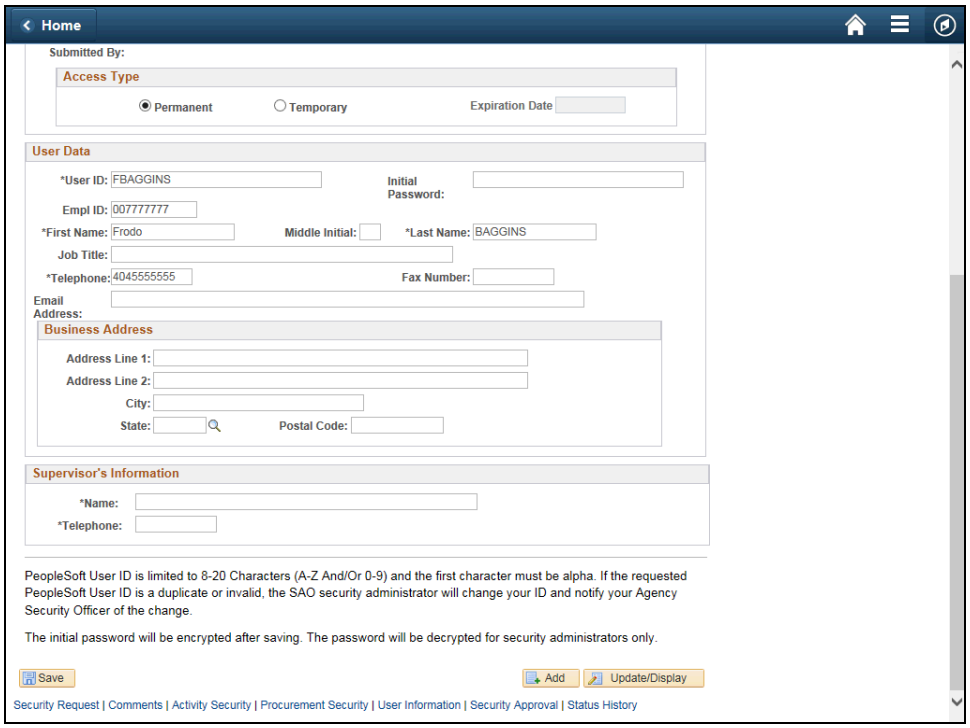
Step	Action
19.	The telephone number is a required field. If the employee or contractor does not have a telephone number, please enter the Supervisor's telephone number. Click in the **Telephone** field. *Telephone:



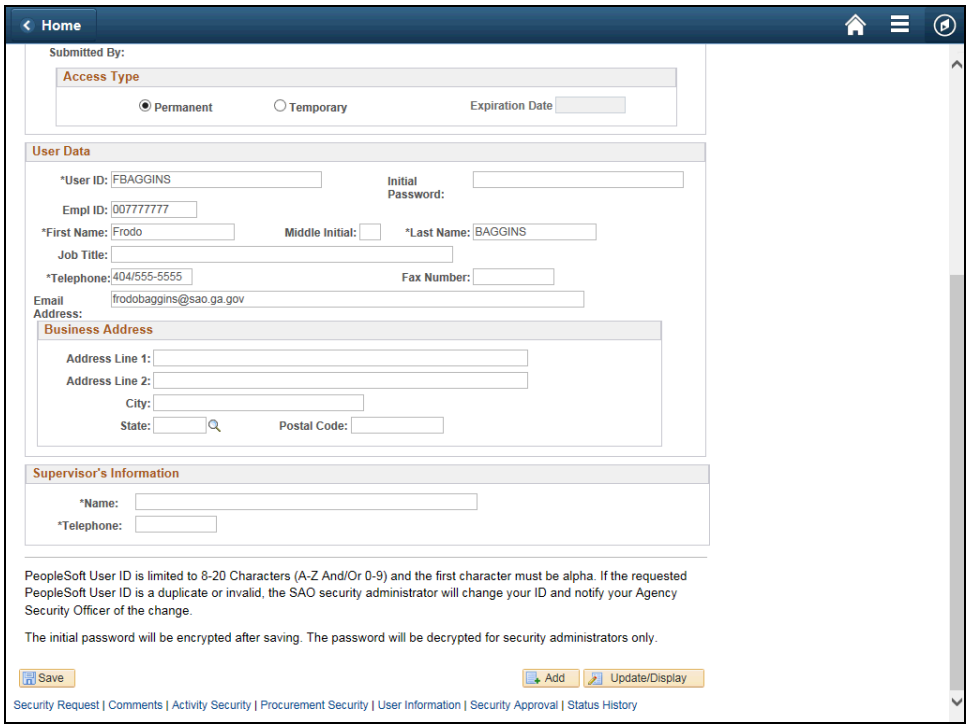
Step	Action
20.	Enter the appropriate information into the **Telephone** field. For this example, type **4045555555**.



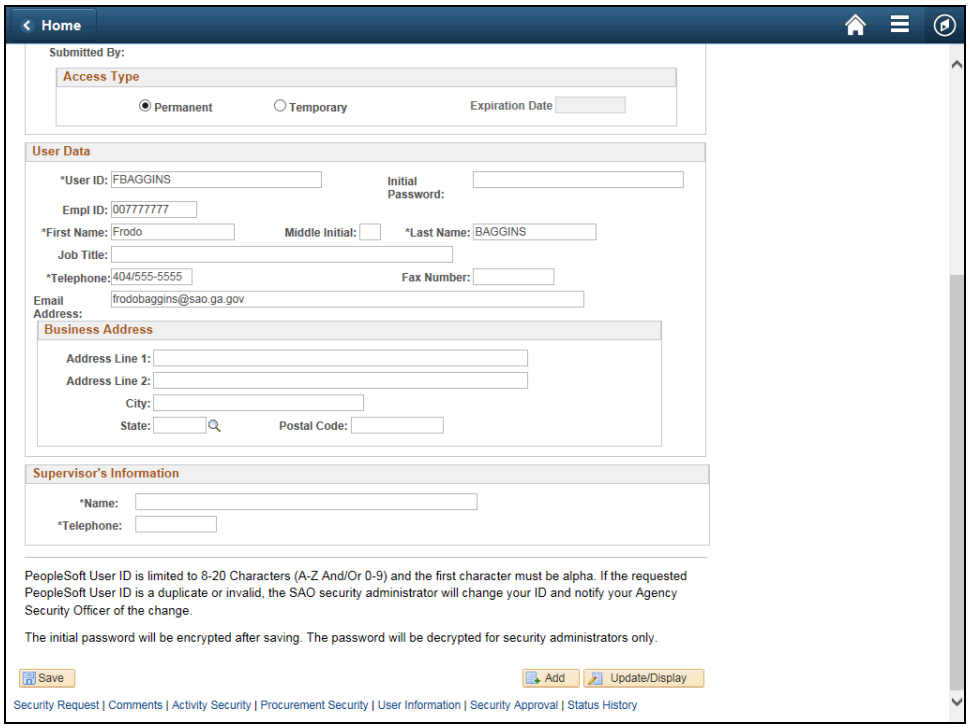
Step	Action
21.	Click in the **Email Address** field.



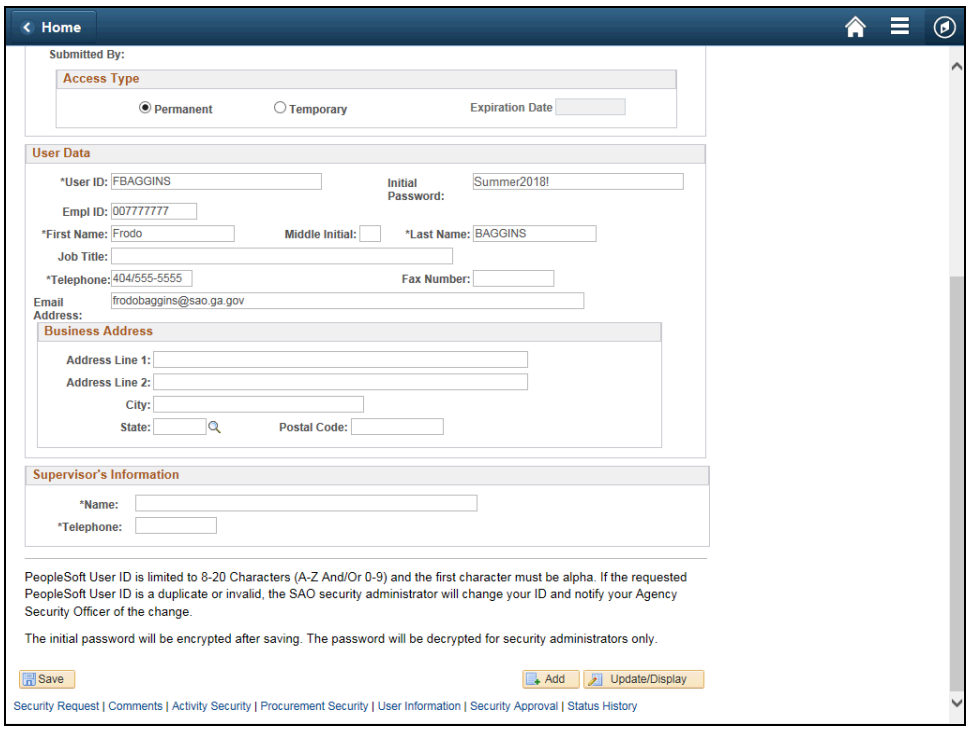
Step	Action
22.	The email address is a required field. If the employee or contractor does not have an email address, please enter the Supervisor's email address or a default email address of **dummy1@sao.ga.gov**. Enter the appropriate information into the **Email Address** field. For this example, type **frodobaggins@sao.ga.gov**.



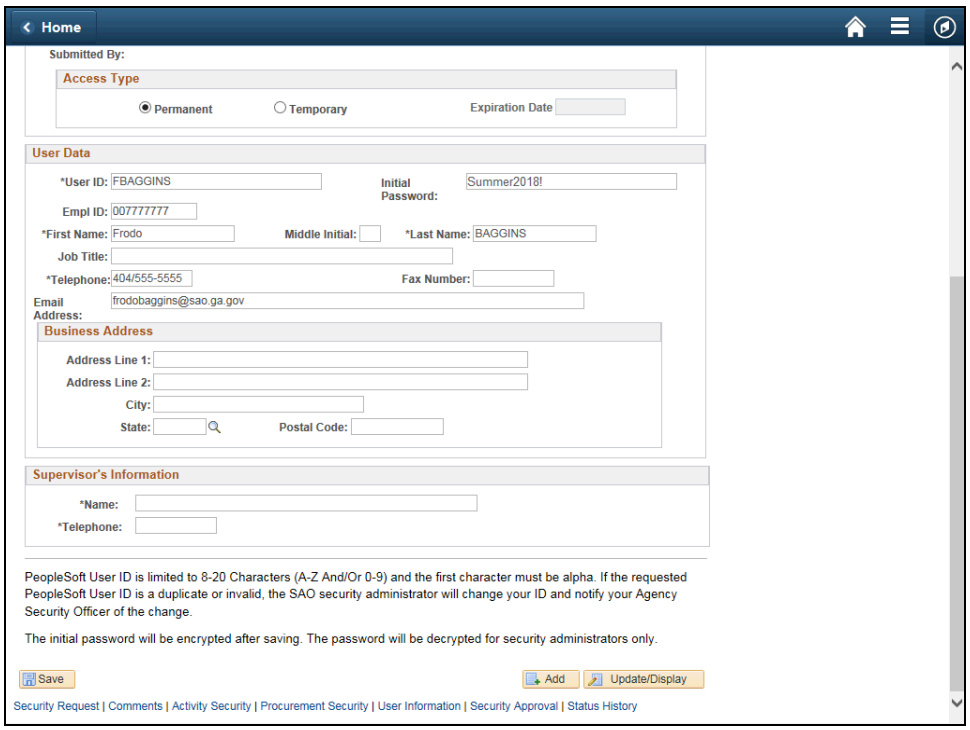
Step	Action
23.	The **Initial Password** must be at least 8 characters long including a number and at least 1 special character. Click in the **Initial Password** field. Initial Password:



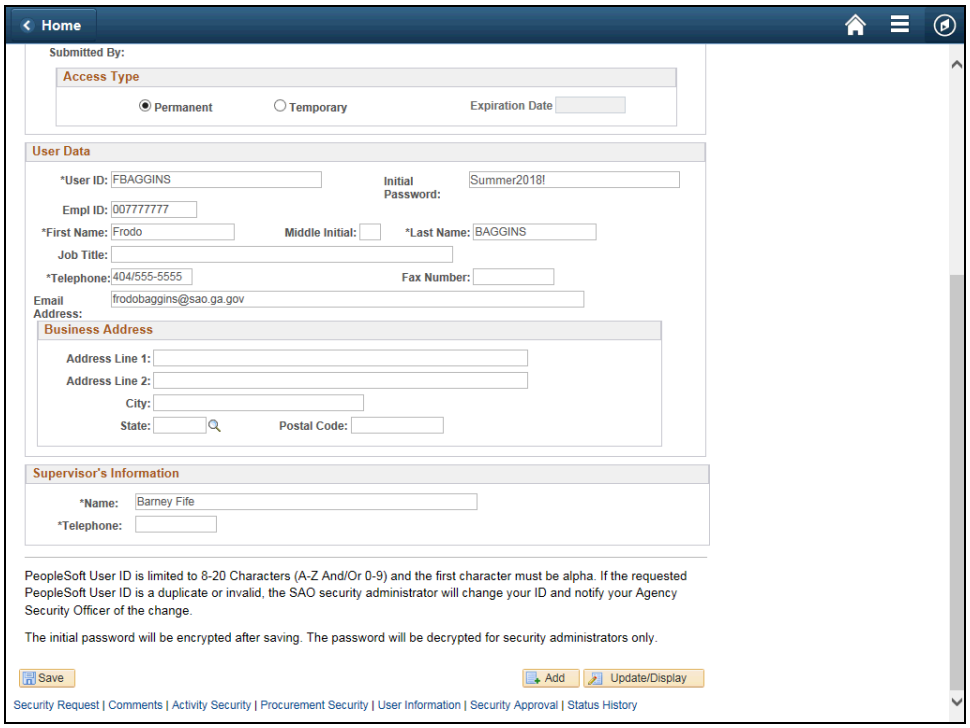
Step	Action
24.	Enter the appropriate information into the **Initial Password** field. For this example, type **Summer2018!**.



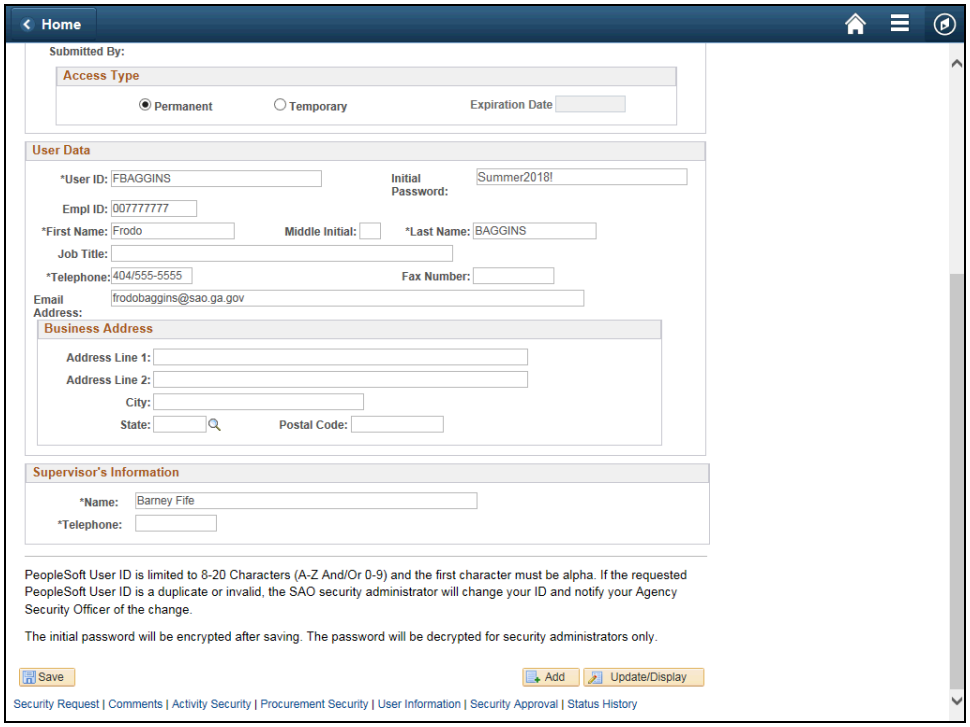
Step	Action
25.	The **Business Address** section is optional. The **Supervisor's information** is required. The name and phone number are needed. Click in the **Name** field. *Name:



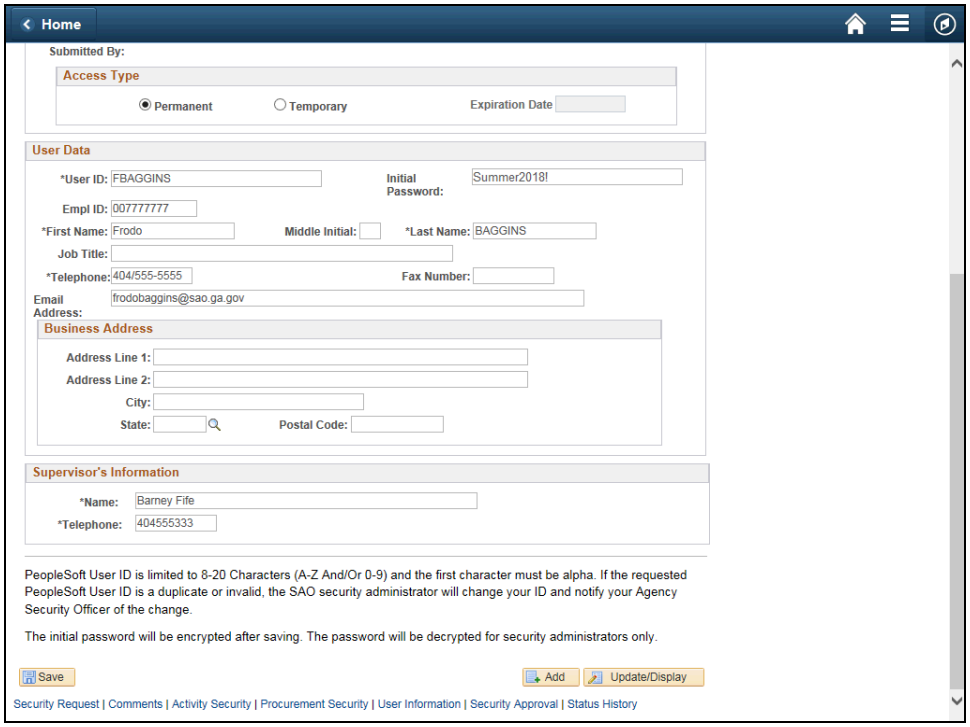
Step	Action
26.	Enter the appropriate information into the **Name** field. For this example, type **Barney Fife**.

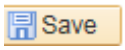


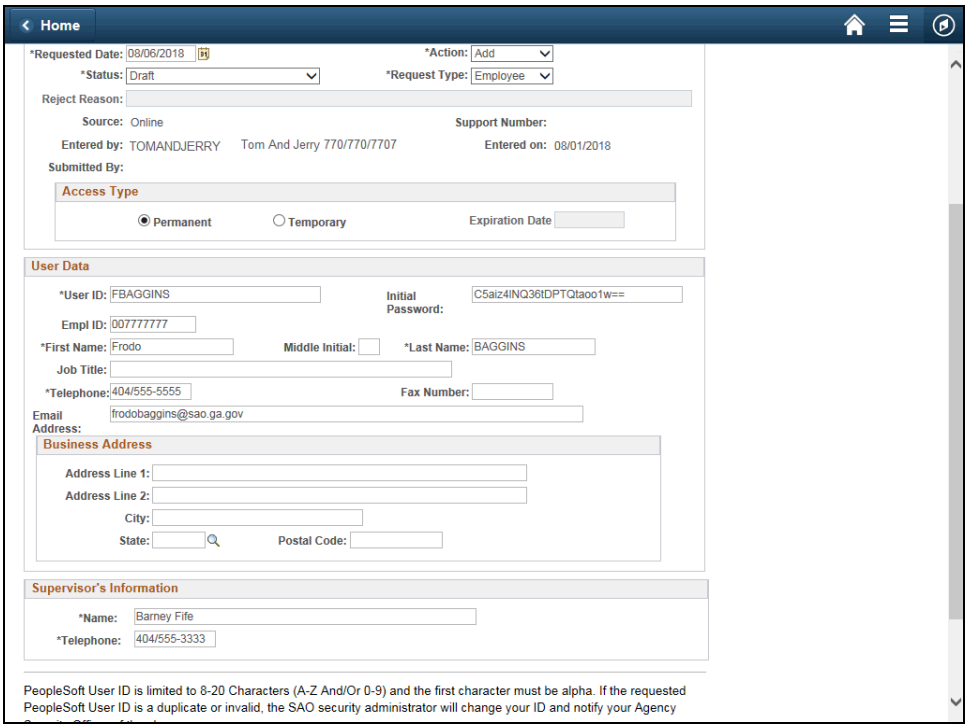
Step	Action
27.	Click in the **Telephone** field. *Telephone:



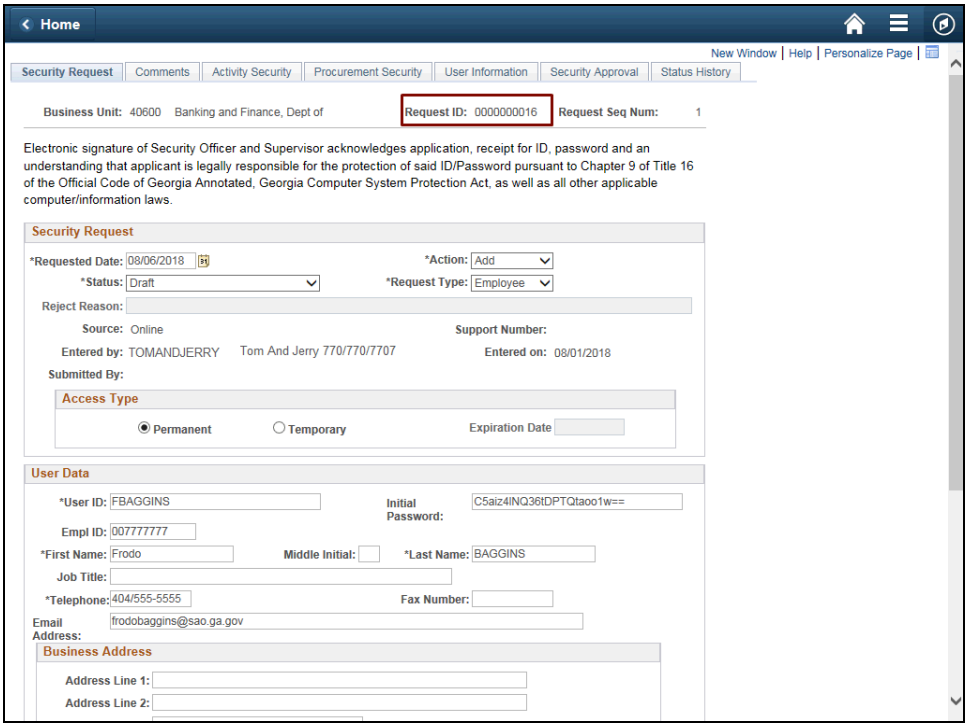
Step	Action
28.	Enter the appropriate information into the **Telephone** field. For this example, type **404/555-3333**.



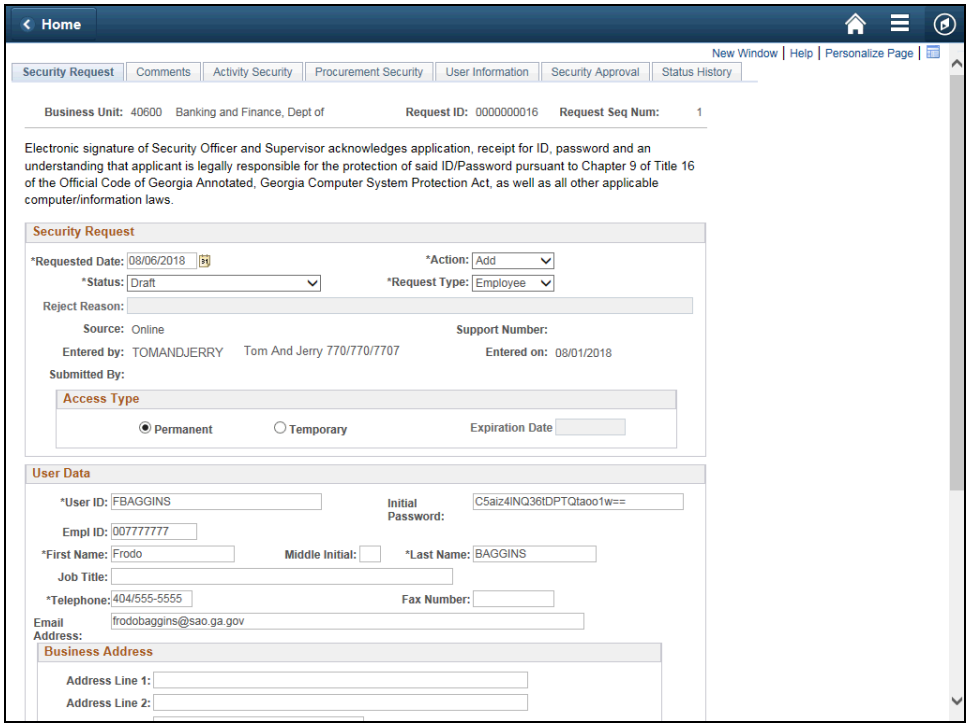
Step	Action
29.	Check that all of the inputted information is correct. Always be sure to save your work. Click the **Save** button. 

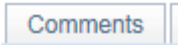


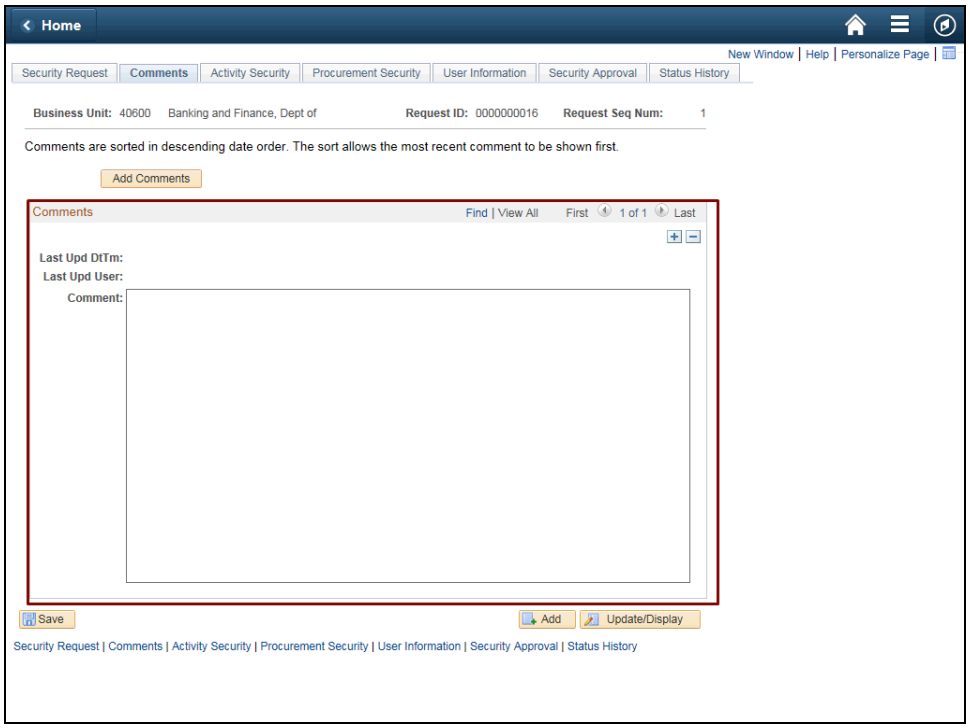
Step	Action
30.	Click the **Vertical** scrollbar to return to the top of the page.



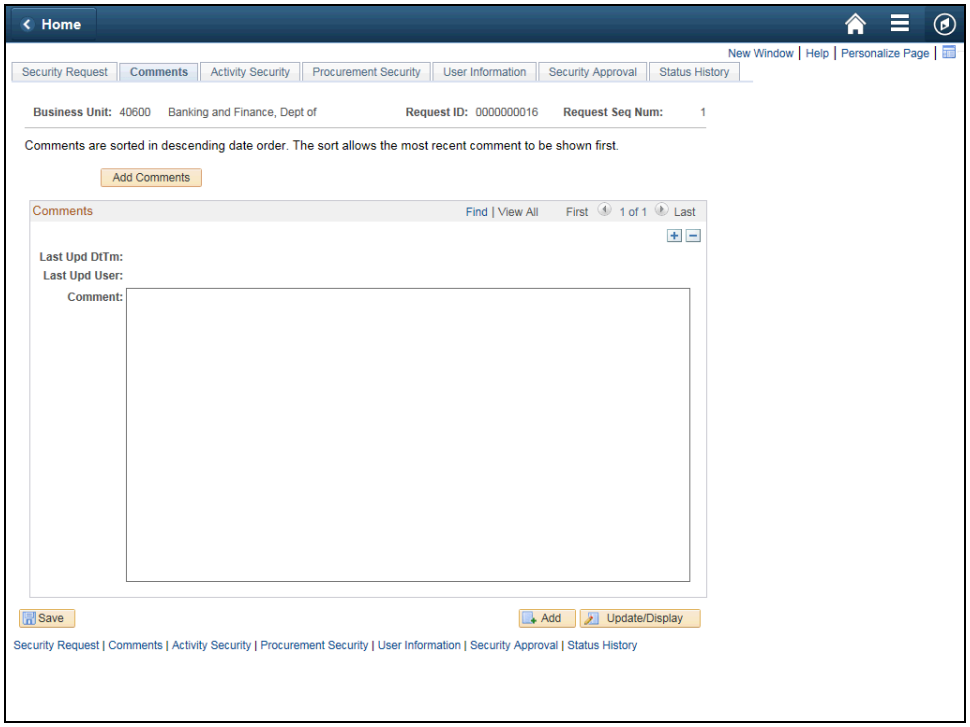
Step	Action
31.	The inputted information has now been saved. Notice there is now a **Request ID.** The **Status** field will remain in Draft Mode until the manager is ready to submit it to the Agency Security Officer. Notice that the **Initial Password** has now been encrypted.



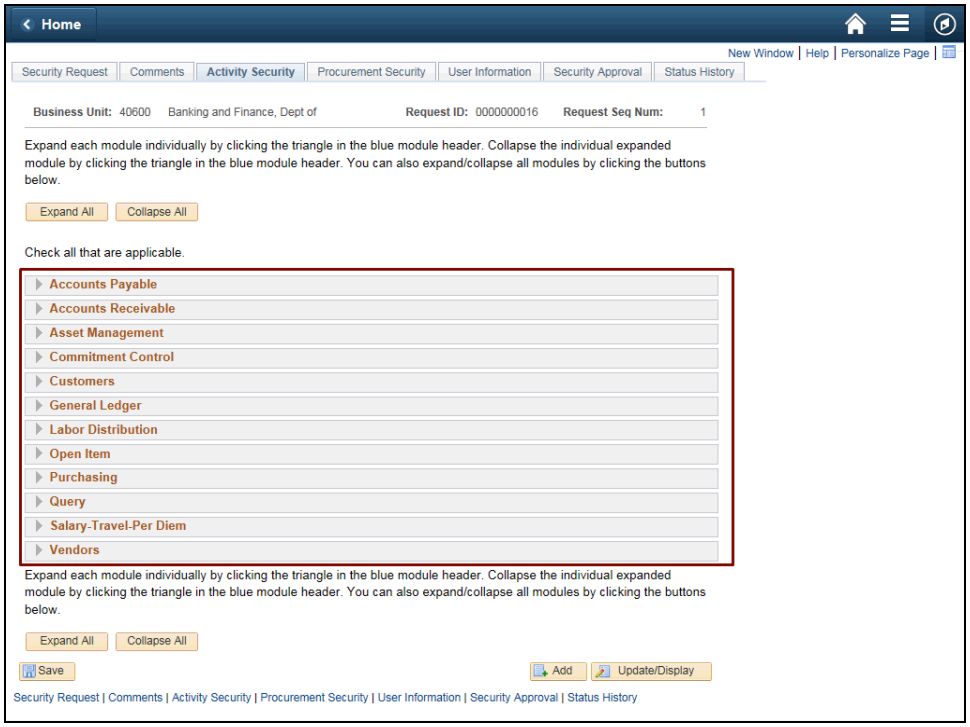
Step	Action
32.	Now let's look at the other tabs. Click the **Comments** tab. 



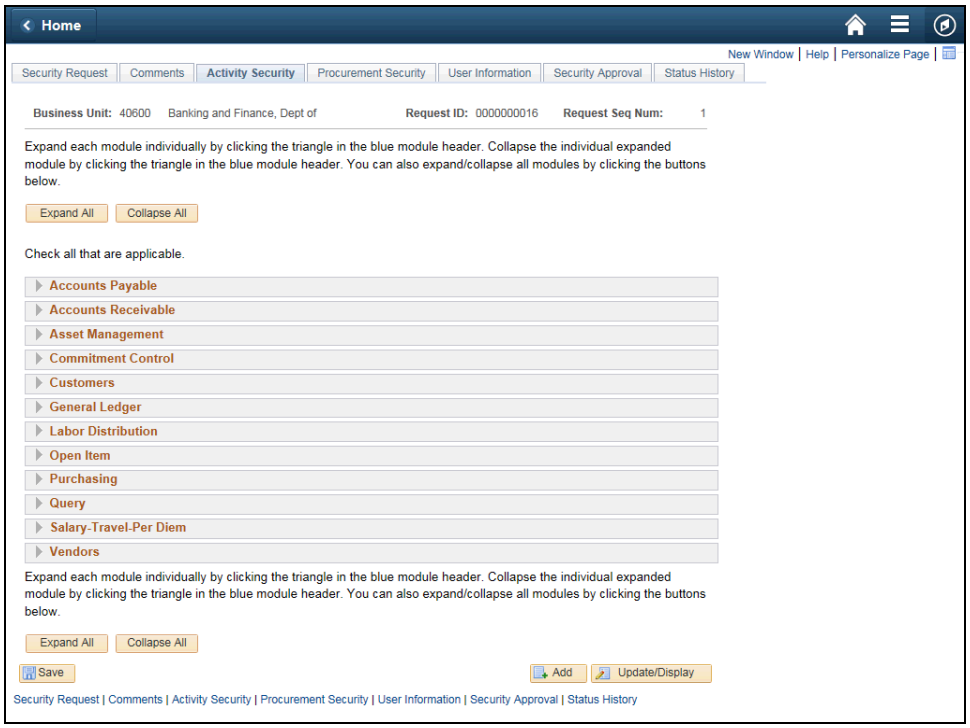
Step	Action
33.	On the **Comments** page, allows for additional information to be added to the request.



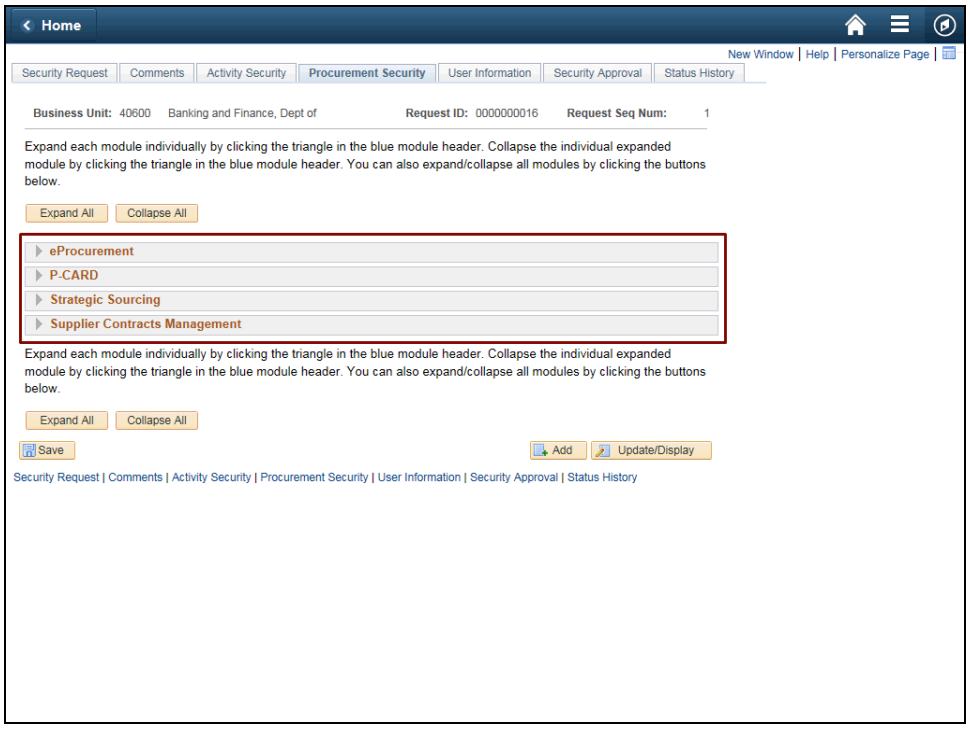
Step	Action
34.	Click the **Activity Security** tab. Activity Security



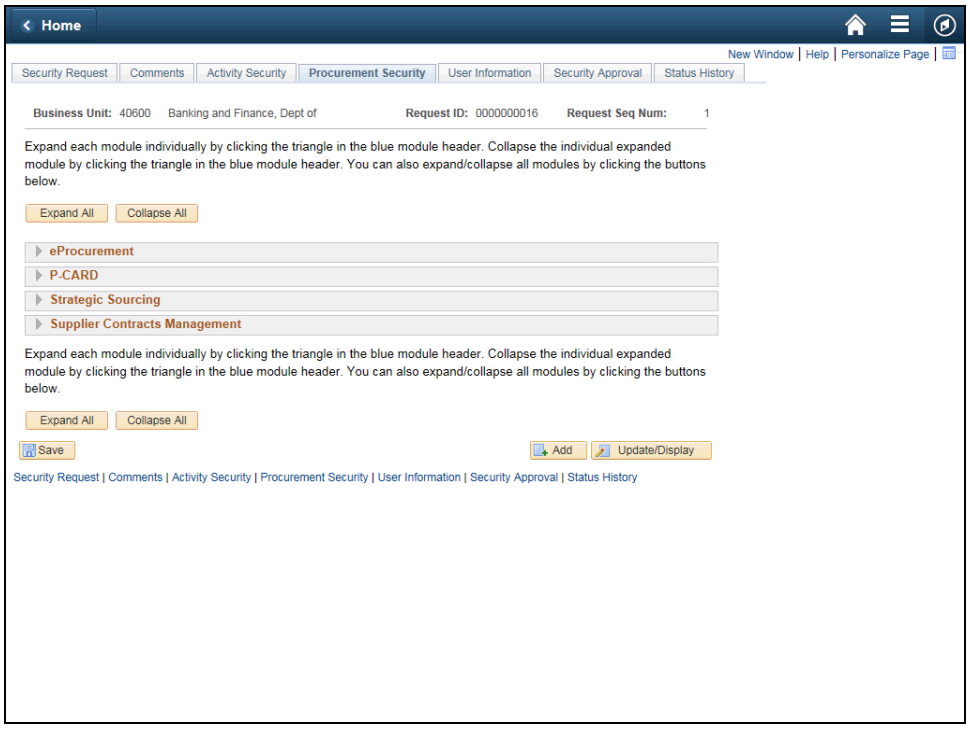
Step	Action
35.	The **Activity Security** tab gives the user the ability to have access within specific the modules.



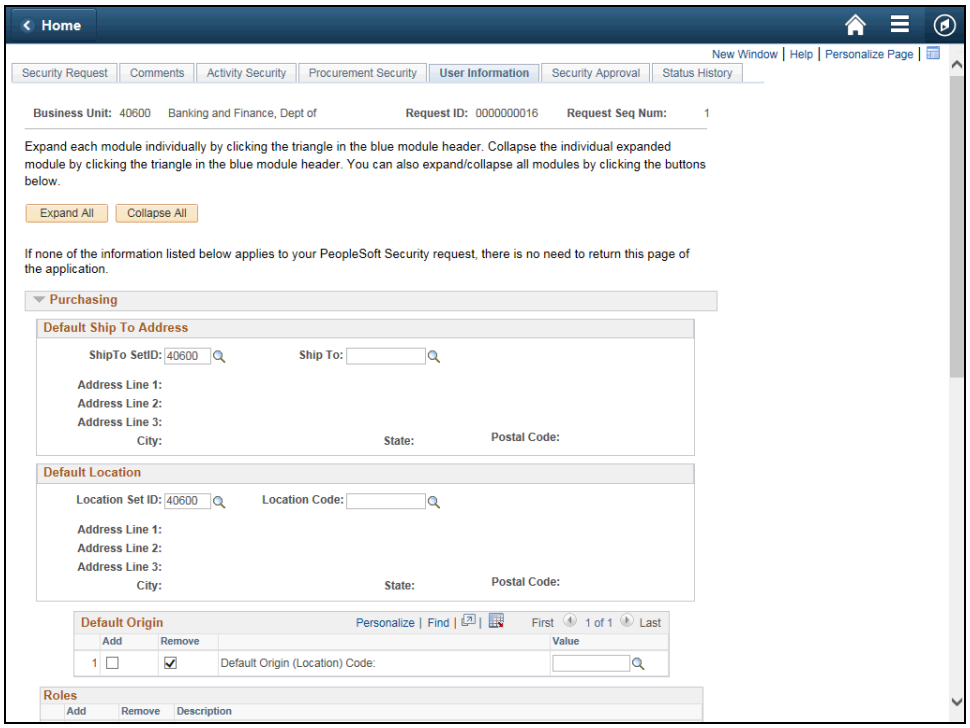
Step	Action
36.	Click the **Procurement Security** tab. Procurement Security



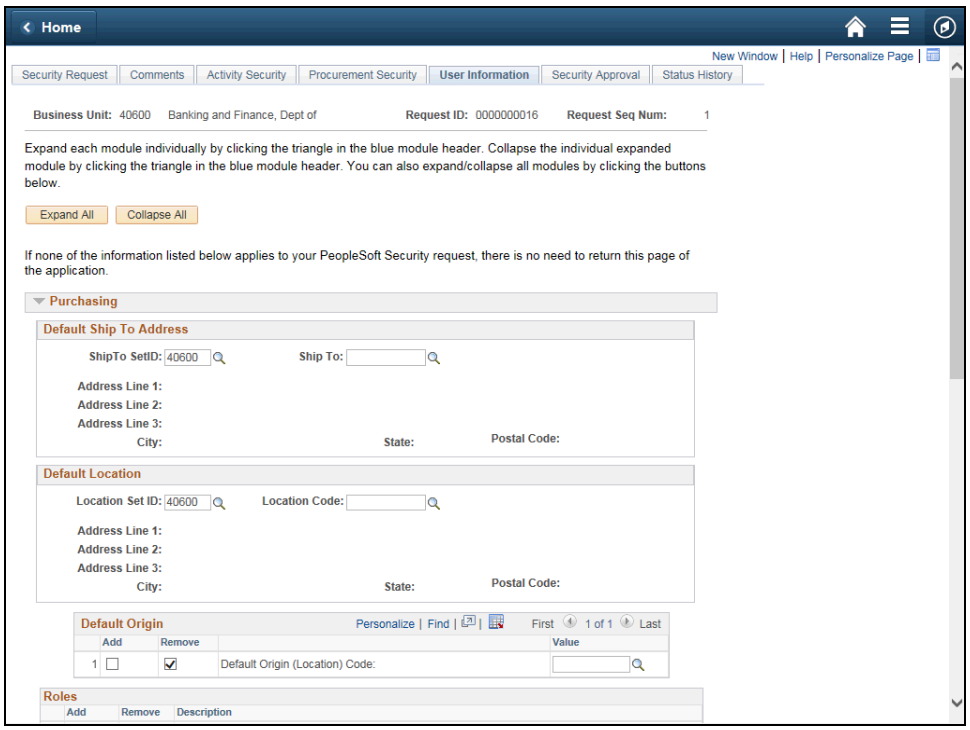
Step	Action
37.	The **Procurement Security** tab allows managers and security officers to provide additional Team Georgia Marketplace access.



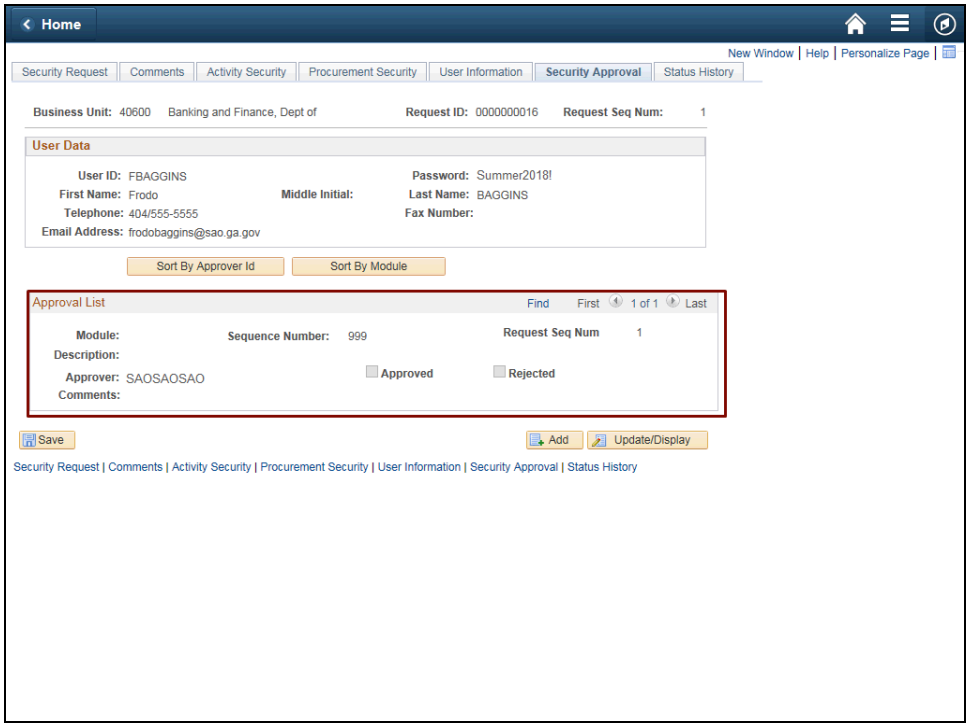
Step	Action
38.	Click the **User Information** tab. User Information



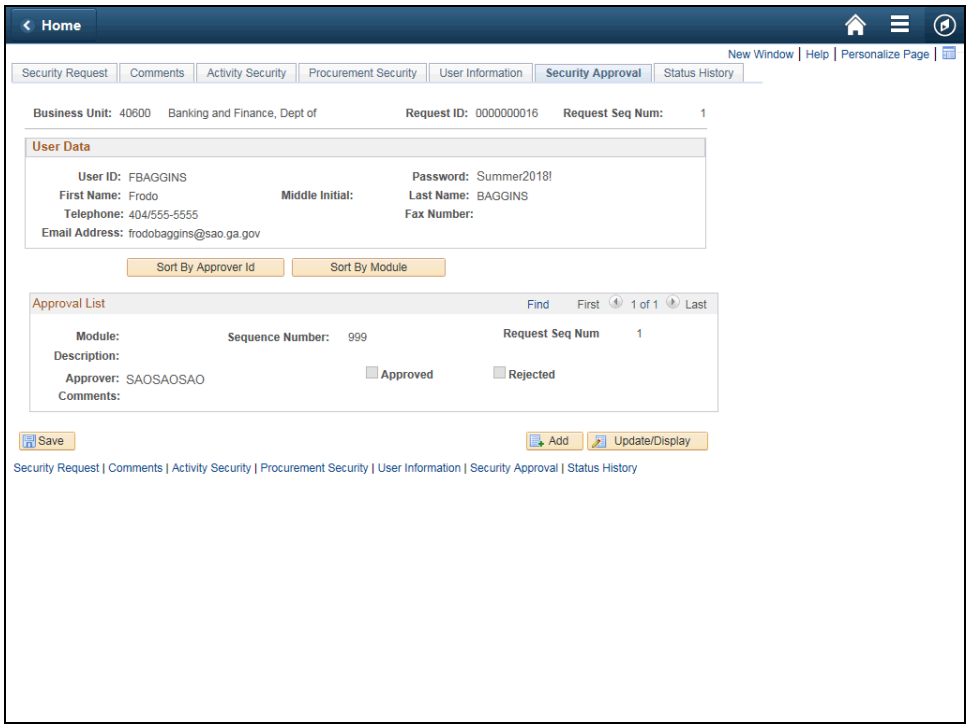
Step	Action
39.	The **User Information** tab allows managers and security officers to provide additional Purchasing and Account Payable access. Click the vertical scrollbar to view additional information on the page.



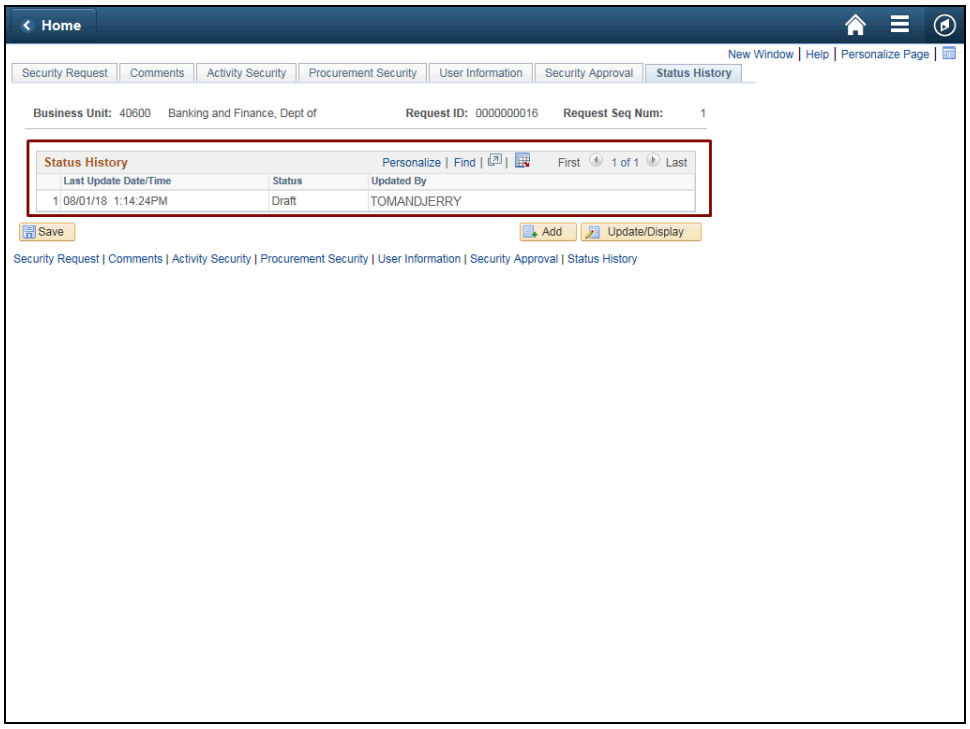
Step	Action
40.	Click the **Security Approval** tab. Security Approval



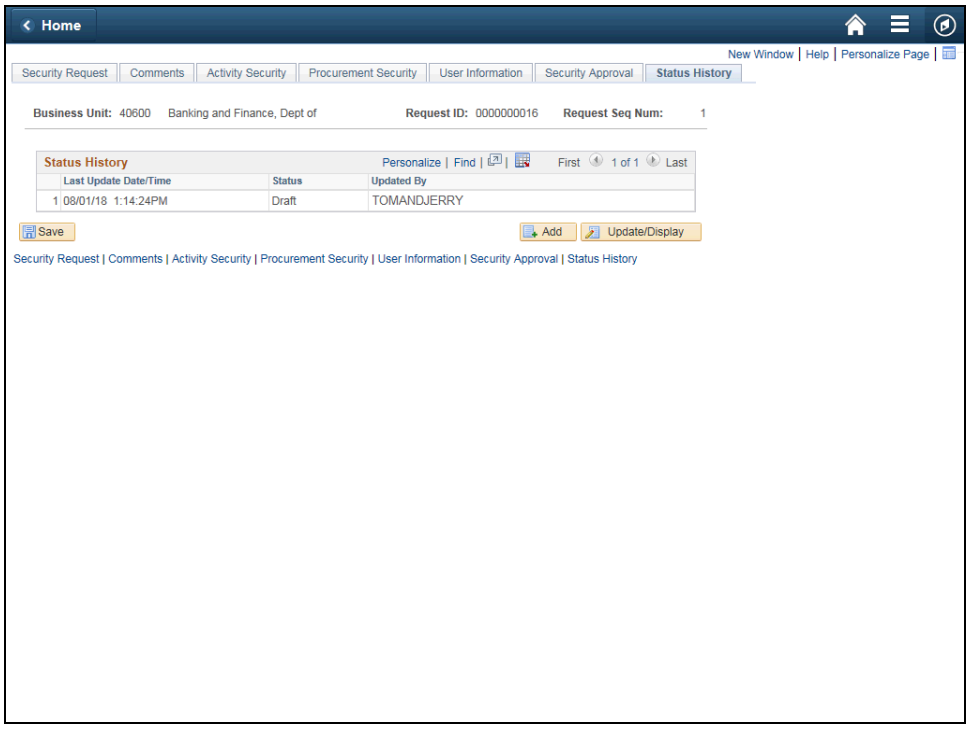
Step	Action
41.	The **Security Approval** page keeps a record of approvals with this particular request.



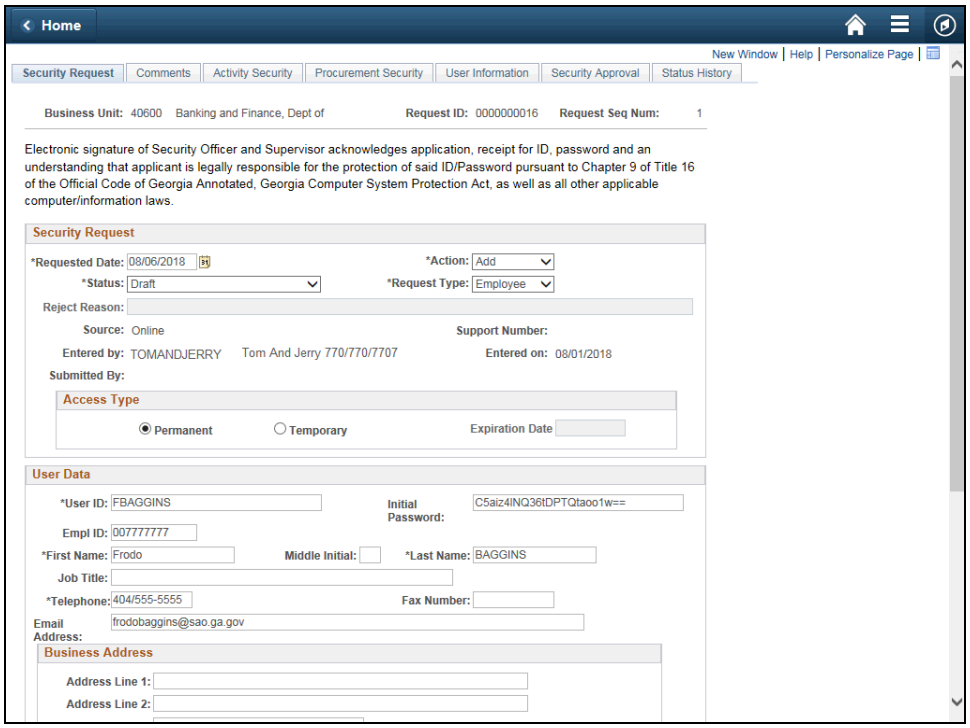
Step	Action
42.	Click the **Status History** tab. Status History

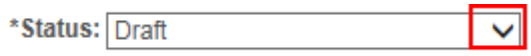


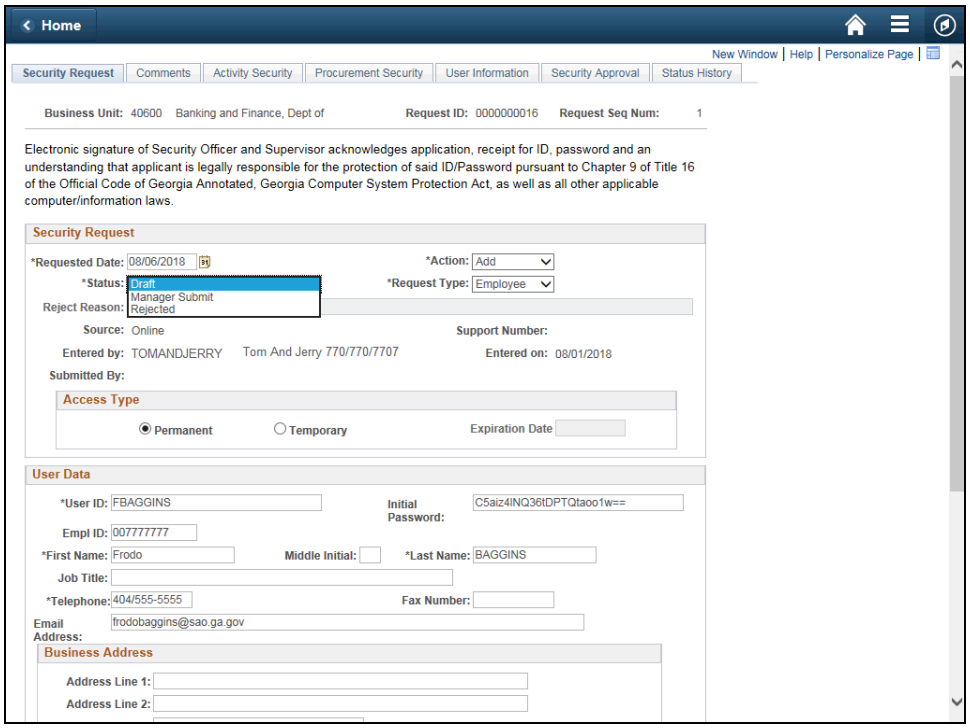
Step	Action
43.	The Status History page keeps a status history of the request.

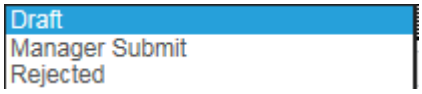


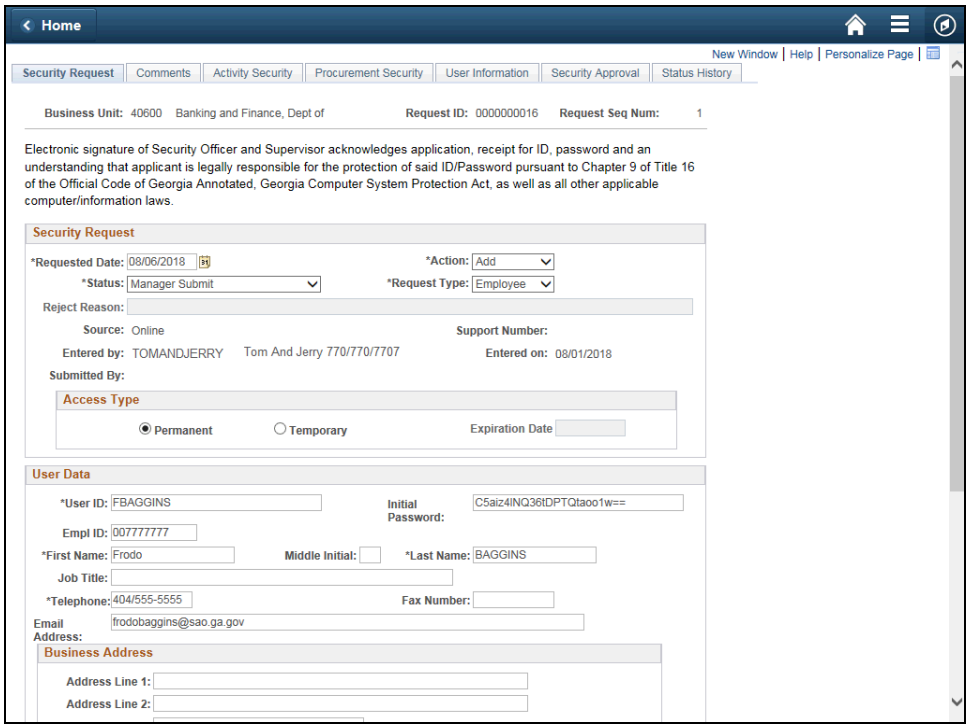
Step	Action
44.	Click the **Security Request** tab. Security Request



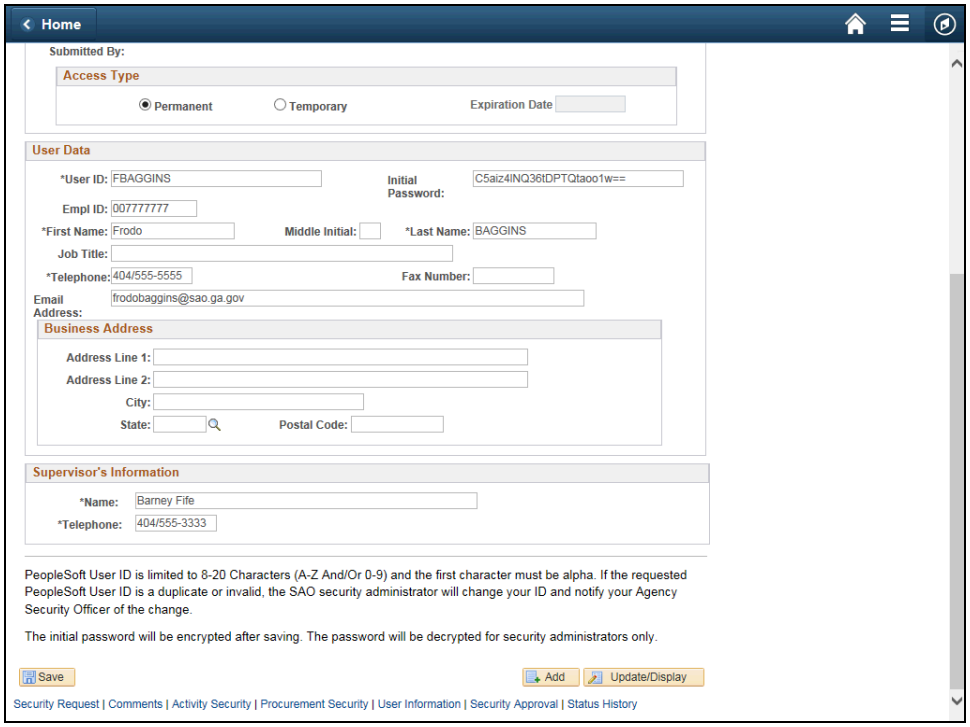
Step	Action
45.	When the new request is completed by the manager, the manager will change the **Status** field from Draft to Manager Submitted. Click the **Status** drop-down list. 

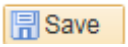


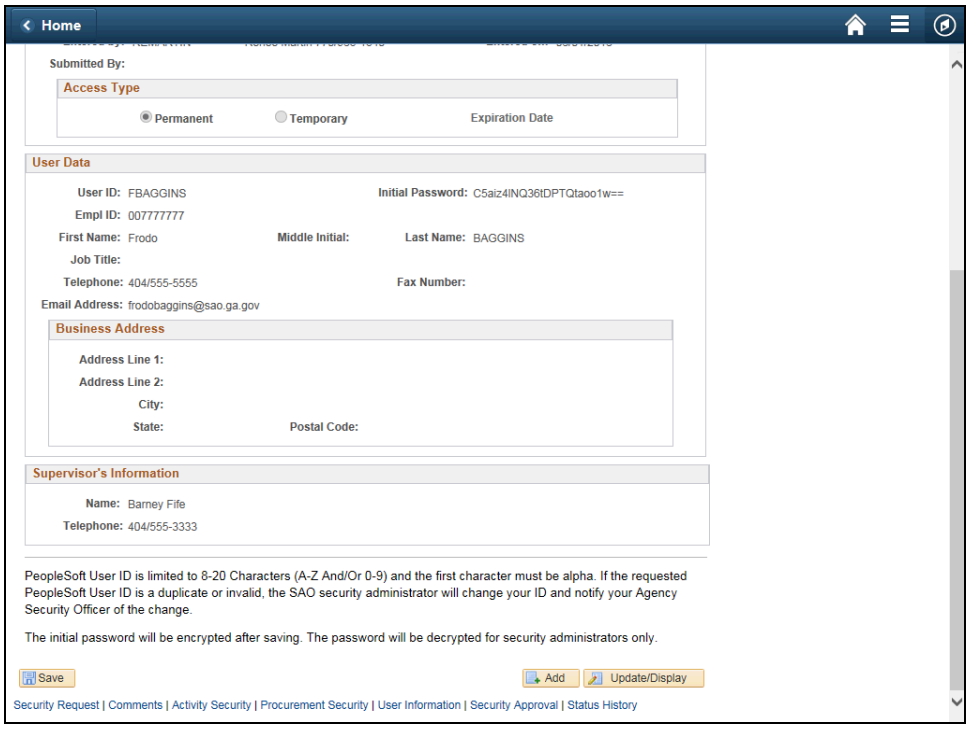
Step	Action
46.	Click the **Manager Submit** list item. 



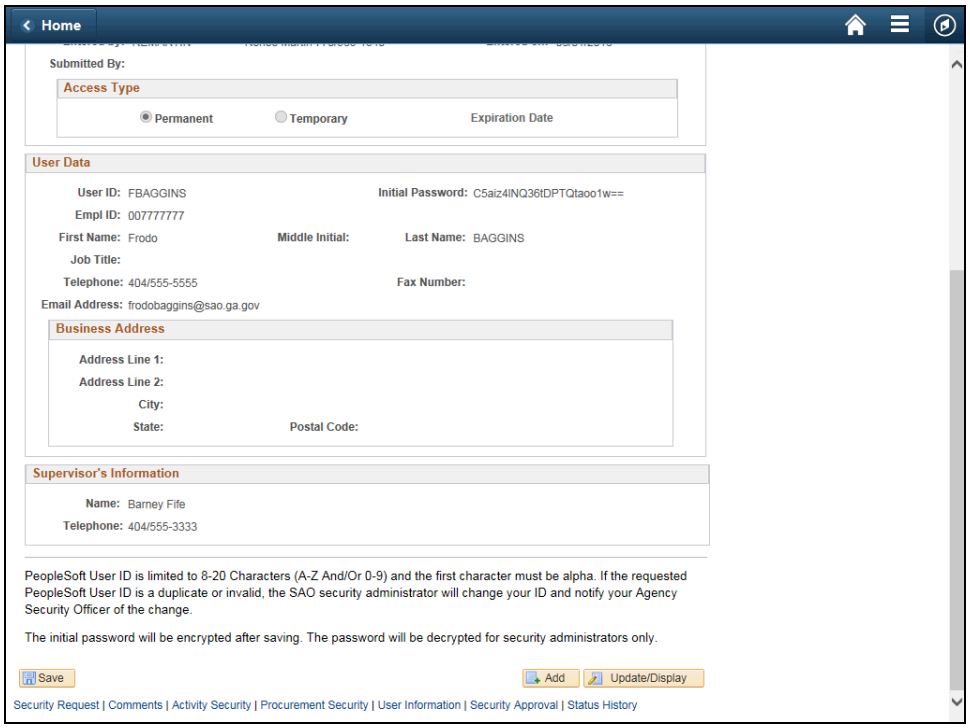
Step	Action
47.	Click the **Vertical** scrollbar to go to the bottom of the page.



Step	Action
48.	Always be sure to save your work. Click the **Save** button. 



Step	Action
49.	An email will now be sent to the Agency Security Officer to inform them that they have a Security Request. The Agency Security Officer will need to review and approve before it is sent to SAO Security to process.



Step	Action
50.	Click **here (**https://www.surveymonkey.com/r/25KG2HH**)** to take a quick survey.

Thank you!