

 Information and Communications Technology Division	Procedure	
	Effective Date	Date of Last Revision
	August 1, 2003	August 9, 2006

Chapter Name	
4.0 Information Management	
Chapter Number	Title
4.5 P1	QUAL Access Procedure

1.0 Purpose

To ensure a stable and effective environment for the Banner QUAL instance. By limiting access in QUAL to specific requests tied to projects or production problems, the environment can be maintained in a controlled manner for testing and staging of elements for migration to the production (BERP) instance.

2.0 Governing Policy	
<u>Number/Document Name</u>	<u>Effective Date</u>
4.3 Change Management	(pending)

3.0 Procedure

This procedure applies to any staff member, functional and/or technical, who may need access for testing in QUAL.

Project Lead (project) or designee - ICT Staff Member (Magic tickets):

1. Fills out form "[Request for Testing/QUAL Access](#)". The required fields are:
 - a. Section I. Project:
 - i. **Requestor Name:** Required. As the "requestor," your name goes here. All usernames and passwords listed in Section III will be sent to this person.
 - ii. **Project Manager:** Optional. This information can be found on the Project spreadsheet (<https://ict.emich.edu/internal/projects.cfm>)
 - iii. **Project/Magic Number:** Required. This information can be found on the Project spreadsheet (<https://ict.emich.edu/internal/projects.cfm>) or the Incident Number if a Magic ticket was created.
 - iv. **Date:** Required. The current date.
 - b. Section II.
 - i. **Environment: Begin and End Dates.** Required. The dates you want the access to be available and valid to the tester.
 - ii. **Comments:** If any of the team member(s) need their password reset, please state this here along with their name(s).
 - c. Section III. Team Members: A list of testers and desired access levels.
 - i. **Name:** Required. The tester's name.
 - ii. **E-ID/my.emich.id:** Required only if requesting access to mytest. The tester's E-ID and my.emich username.

- iii. **Security Type:** Required. Check all that apply.
- **myTest:** Test instance of Luminis, linked to Test instances on Self-service and QUAL. (Logging in requires tester to enter my.emich username and supplied password).
 - **WebXtender:** Test instance of WebXtender, linked to QUAL. (Logging in requires INB QUAL username and password).
 - **INB: QUAL Instance.** (Logging in requires production/BERP username and previous QUAL password/supplied password).
 - **INB Security Type:** Required if INB is checked. This helps the Banner security team determine the level of access to apply to the user's INB QUAL username and password. Enter one of the following choices:
 - **Same as BERP** – Same a user's production security access
 - **Other** – If requesting access other than "Same as BERP", please state the requested security access
 - **Approve Requisitions** – Test Requisition Approval forms.

2. Sends completed request to Production Control. <mailto:Production.Control@emich.edu>

Production Control:

1. Verifies completeness of form.
2. Coordinates access for multiple projects.
3. Identifies scheduling conflict(s); if one exists, the request for access is sent to the Associate Director, Enterprise Operations for resolution.
4. Creates a Magic ticket (with the requestor as the client), attaches the QUAL request form* and assigns to the designated staff group based on what was indicated:
 - a. **myTest:** Web team
 - b. **WebXtender:** Xtender
 - c. **INB:** Banner Security Team

Security Team:

1. Updates access for Banner accounts on the form.
2. Unlocks accounts on the starting date and locks the accounts on the ending date.
3. Closes Magic ticket. Magic will automatically send an e-mail to the requestor/client.
4. Sends separate e-mail containing a generic password, if applicable. Requestor will be responsible for adhering to password standards.

Web team/Xtender Assigned Staff:

1. Updates access for accounts on the form.
2. Closes Magic ticket. Magic will automatically send an email to the requestor/client

Requestor:

1. Notifies "Team Members" that access has been granted, and if necessary, helps them get logged in for testing.

***Note** – Production Control will send QUAL access form as attachment to a separate e-mail for the Banner Security Team only.

4.0 Responsibility for Implementation

ICT Operations is responsible for overall implementation, administration and interpretation of this procedure.

Production Control is responsible for the implementation and maintenance of access scheduling.

The ICT Security Team/Web Team/Xtender Team is responsible for granting access for the scheduled time period.

5.0 Definitions	
<u>Term</u>	<u>Definition</u>
BERP	Production Enterprise Resource Planning (ERP) System instance.
E-ID	Individual identifier assigned to any person entered into the ERP system. This identifier is associated and is unique per person. Example: E00000552
Instance	A comprehensive database environment: software, table structure, stored procedures and other functionality. Organizations can have multiple instances, such as development and testing, quality assurance testing, and production.
Internet Native Banner (INB)	Web access to EMU's ERP system
Lock	Status of Banner account that will not allow access into the system.
Luminis	Name of EMU's portal product used within the EMU web site to allow personalization of web pages. This product/vendor may change as a result of mergers or acquisitions.
Magic	Name of Product used by EMU's Help Desk to track work orders and call tickets. This product/vendor may change as a result of mergers or acquisitions.
My.Emich Username	Id used to log into the My.Emich tab on the EMU web site. Format is First initial followed by first characters of the last name followed by sequential number for uniqueness. Maximum of eight characters in length. Example: JSMITH03
MyTest	Quality assurance test environment for the self service ERP application.
Portal	Web site that serves as a starting point to other destinations or activities on the Web.
QUAL	Enterprise Resource Planning (ERP) System instance used for quality control testing. This is the last area to test changes in before they become production.
Self -Service	Application that allows EMU employees/students/donors etc to serve themselves using the Web.
Unlock	Status of Banner account that will allow access into the system.
WebXtender	Name of product used by EMU departments to produce electronic images of official documents. This product/vendor may change as a result of mergers or acquisitions.

6.0 Revision History			
<u>Creator</u>	<u>Description</u>	<u>Submission Date</u>	<u>Approval Date</u>
L. Rose	Redrafted from grandfathered document	January 13, 2006	
B. Laundra	Revised to procedure format	January 28, 2006	
L. Dorendorf	Reorganized for procedure style	February 10, 2006	
B. Laundra	Copyedited/proofed for upload	February 14, 2006	
L. Dorendorf	Revisions to form, new functionality, definitions	June 14, 20, 2006	
PRC	Committee revisions: definitions	July 19, 2006	
L. Rose	Minor edits	August 9, 2006	