

iStrategy Security Administration

Version 1.4
03/27/2012



BOARD OF REGENTS UNIVERSITY SYSTEM OF GEORGIA

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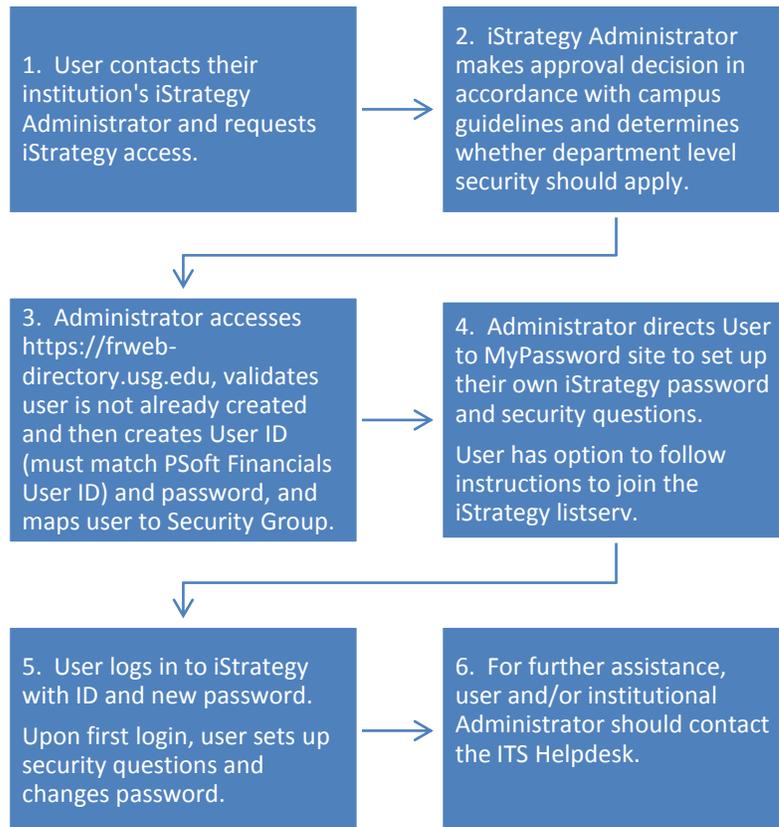
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iStrategy Security Administration

This document provides the new business process flow along with step-by-step instructions for performing iStrategy Security Administration.

iStrategy User Account Setup – Process Flow

As a prerequisite, iStrategy Administrators must verify that all iStrategy users have an active PeopleSoft User ID before moving forward with any iStrategy setup.



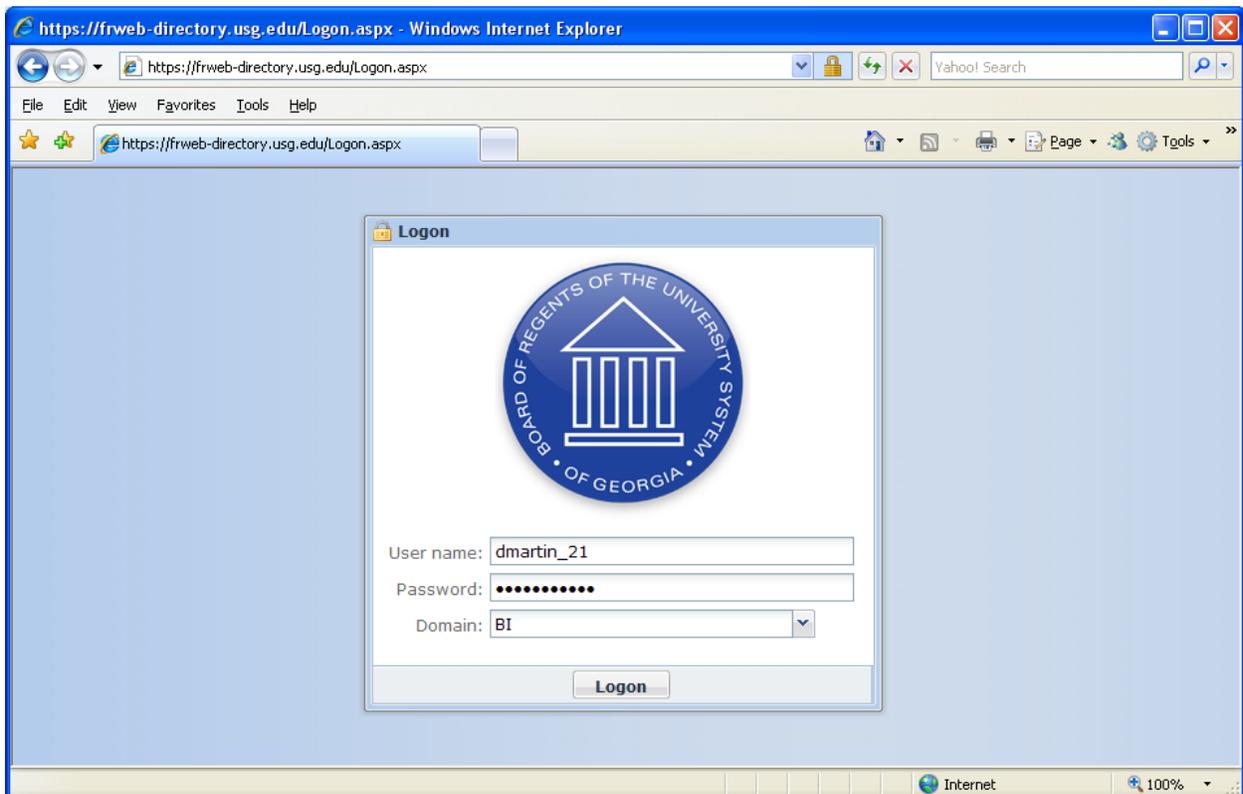
Key Points

1. Each institution has an iStrategy Administrator. The Administrator is responsible for setting up and maintaining iStrategy access for users at his or her institution. The iStrategy Administrator list is located at <http://www.usg.edu/gafirst-fin/istrategy>. Changes to this list must be communicated to ITS via the ITS Helpdesk (Helpdesk@usg.edu, 706-583-2001).
2. All user guides, training sessions, and iStrategy communications will instruct users to contact the iStrategy Administrator at their institution to request access to iStrategy.
3. iStrategy User IDs must match PeopleSoft Financials User IDs. iStrategy security includes department level security which can be used to restrict users to a specific department. PeopleSoft Financials is the source for department and user information in iStrategy. User ID mismatches will result in the inability to utilize department level security in iStrategy.
4. New iStrategy users will need to change their iStrategy Passwords using the MyPassword tool the first time that they login to iStrategy (<https://frweb.usg.edu>). Instructions for using MyPassword are located in the iStrategy User Guide (http://www.usg.edu/gafirst-fin/documents/MyPassword_training_guide.pdf). These instructions also assist users in setting up their user profile security questions should they need to unlock their iStrategy user account or change their password in the future.
5. In accordance with USG Information Security best practice, passwords will expire every 180 days.
6. iStrategy Institution Administrators are now the first point of contact for iStrategy user maintenance.
7. Administrators are encouraged to maintain user accounts with regard to job status changes in accordance with institutional processes. Administrators receiving notice that a user is no longer employed should remove the user from iStrategy.
8. ITS will continue to validate employee termination and transfers monthly and will continue to contact the Institution Administrator to confirm iStrategy deletion requests.
9. iStrategy has a listserv which is used to distribute information to all users regarding the USG implementation of iStrategy including enhancements and downtime. Users are encouraged to join the listserv in order to stay informed about iStrategy. Instructions for how to join the listserv are located in the [iStrategy Self Service section](#) of this document, as well as in the iStrategy User Guide.

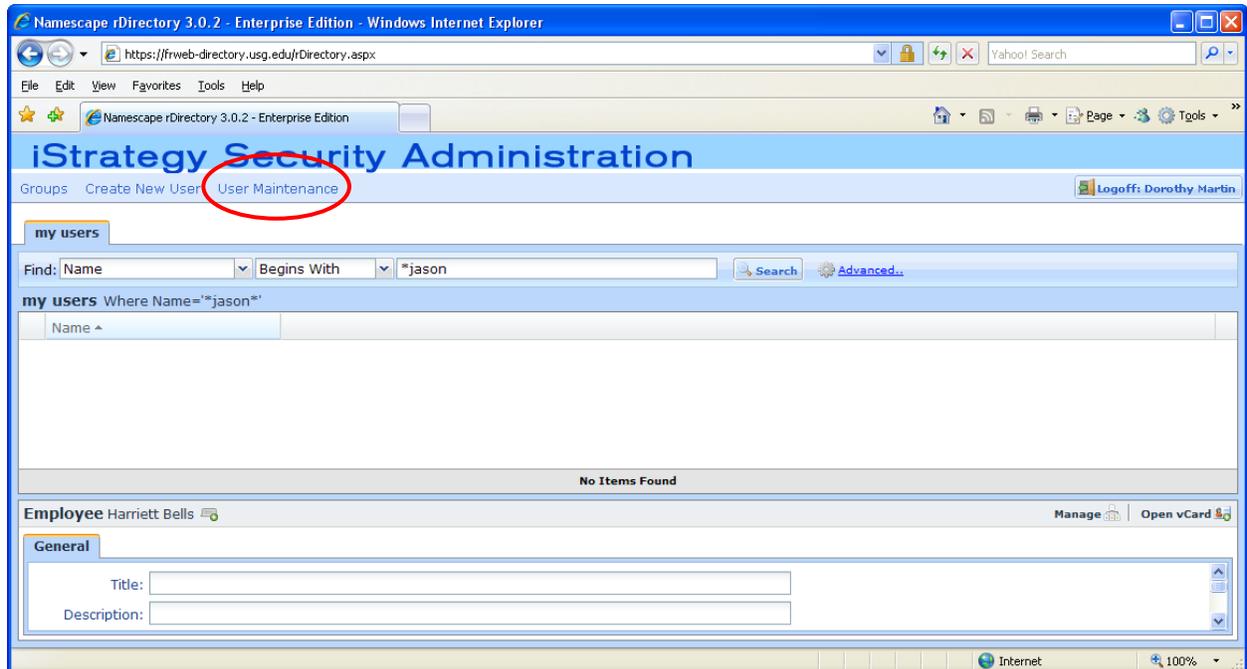
Creating a New iStrategy User

In this guide, we will create a new user named Jason Beitzel Tester at Albany State University. Jason Beitzel Tester's PeopleSoft Financials User ID is jbite_tester.

Step 1: Access iStrategy Security Administration using the following URL <https://frweb-directory.usg.edu>. Enter User Name and Password, then click the **Logon** button.



Step 2: Select the **User Maintenance** tab. Enter the user's name or id to confirm the user is not currently active in iStrategy. This can also be used to validate if a user is set up multiple times in iStrategy.



Step 3: Select the **Create New User** tab.

The screenshot shows the iStrategy Security Administration web interface. The browser title is "Namescape rDirectory 3.0.2 - Enterprise Edition - Windows Internet Explorer". The address bar shows "https://frweb-directory.usg.edu/rDirectory.aspx". The page title is "iStrategy Security Administration". The navigation menu includes "Groups" and "Create New User", with "Create New User" circled in red. The "Security Groups" section is active, showing a search for "Name" with "Begins With" set to "*". The search results show two items: "210_ASU_GENERAL" and "210_ASU_Restricted". The "210_ASU_GENERAL" group is selected, and its members are listed in a scrollable area: "Adrey Lane , Ashley Freeman , Dorothy Martin , Emma Wingfield , Harriett Bells , Heidi Cox , Katherine Laster , Kenneth Abiddie , Larry Wakefield , Marion Ryant , Support 21000".

Step 4: Enter the user's information and create a password for him or her as shown in the screenshot below.

Important Note: The User logon name must match the user's PeopleSoft Financials User ID. The User logon name field will populate automatically when you enter the user's first and last name. This must be edited to match the PeopleSoft User ID. Double-click at the end of the User logon name (pre-Windows 2000) to highlight the user and change the User logon name.

The password must be at least 10 characters in length and contain at least three of the following four types of characters: English upper case (A – Z); English lower case (a – z); Numbers (0 – 9); Non-alpha special characters (\$,!,%,^,&,@, etc.).

Note that the Account Options box that prompts the user to change his or her password is checked by default to ensure that user must set his or her own password when they logon for the first time.

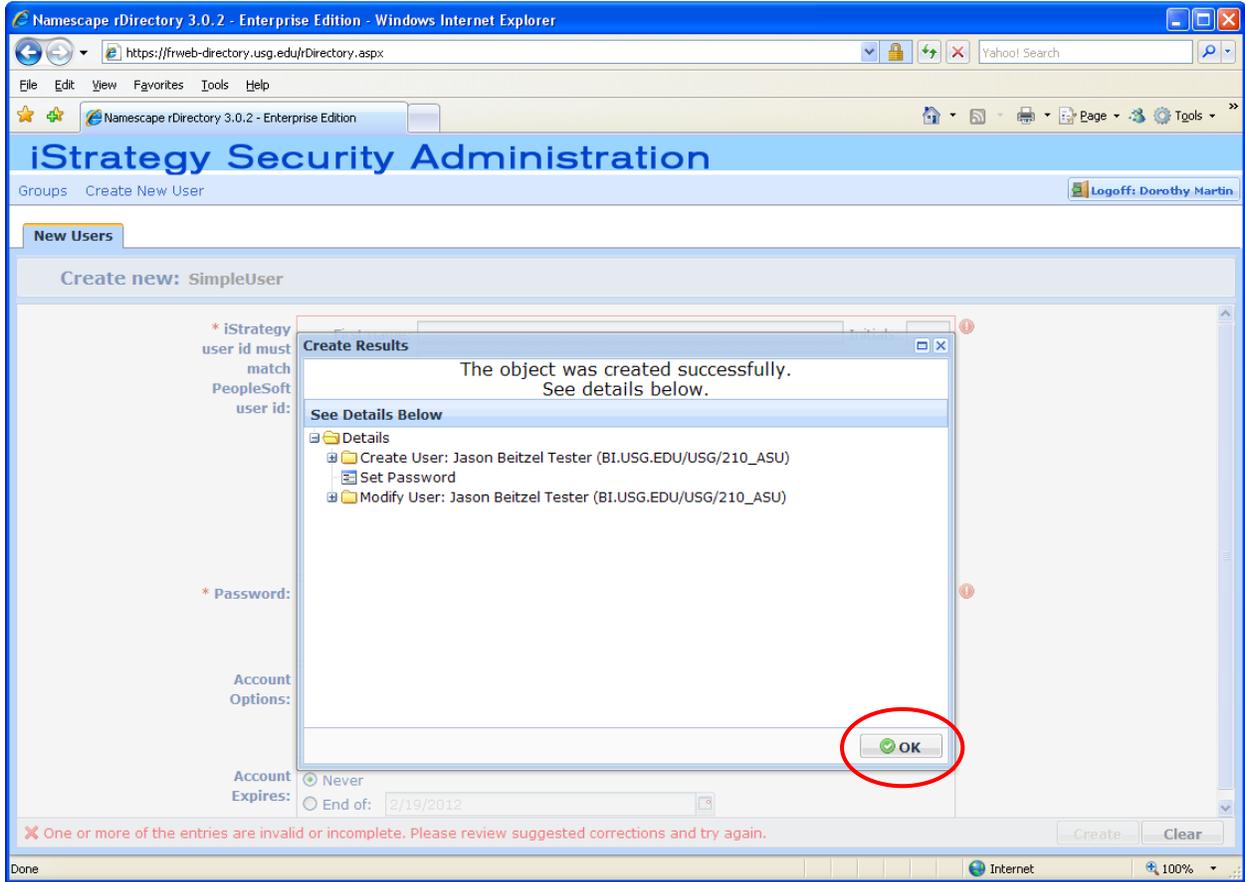
Click the **Create** button at the bottom right of the page.

The screenshot shows the 'Create new: SimpleUser' form in the iStrategy Security Administration interface. The form is titled 'New Users' and 'Create new: SimpleUser'. It contains the following fields and options:

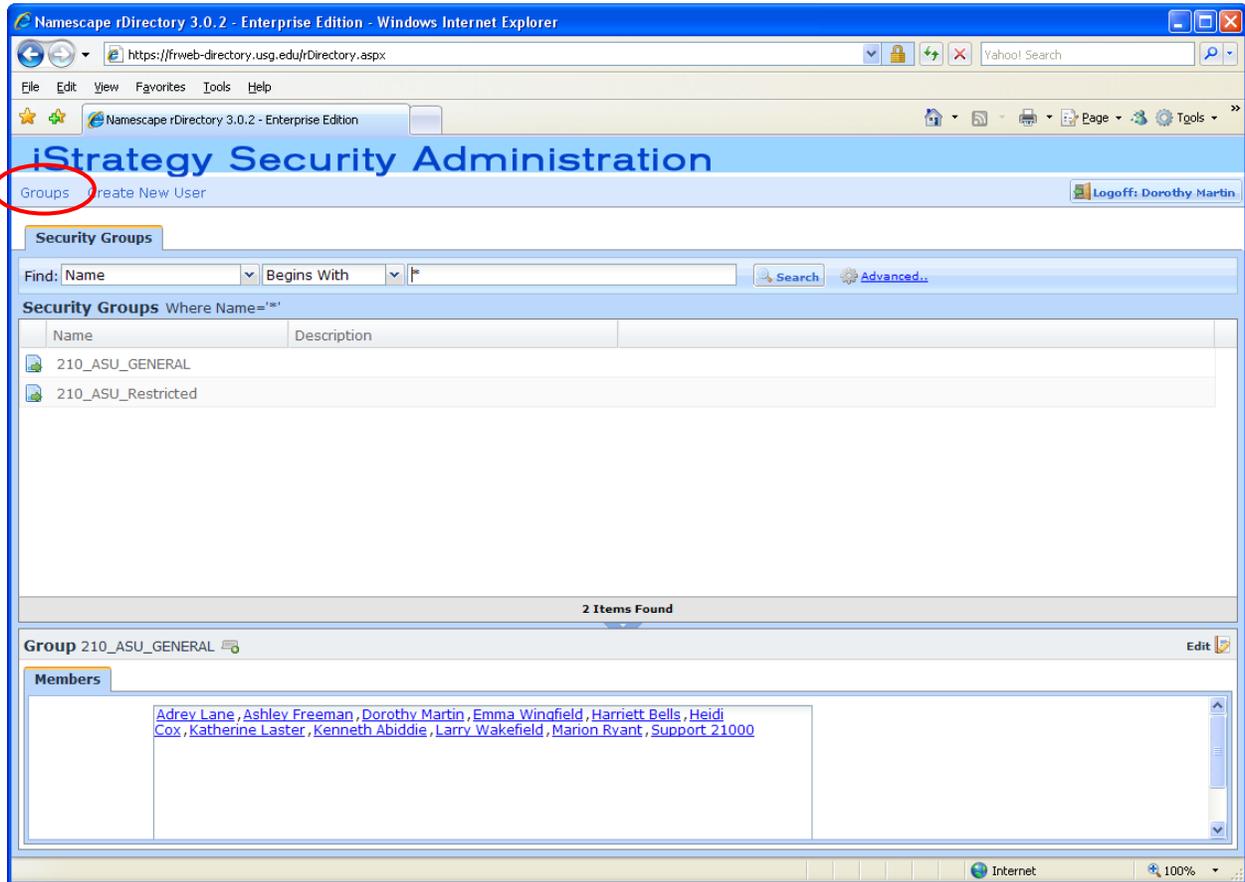
- * iStrategy user id must match PeopleSoft user id:**
 - First name: Jason
 - Last name: Beitzel Tester
 - Display name: Jason Beitzel Tester
- System Fields:**
 - User logon name: jbite_tester @BI.USG.EDU
 - User logon name (pre-Windows 2000): jbite_tester BI\
 - Object name: Jason Beitzel Tester
- * Password:**
 - Enter: [masked]
 - Re-enter: [masked]
 - Feedback: Password meets Complexity and Length requirements.
- Account Options:**
 - User must change password at next logon
 - User cannot change password
 - Password never expires
 - Account is disabled
- Account Expires:**
 - Never
 - End of: 2/19/2012

The 'Create' button is circled in red at the bottom right of the form.

Once you select the **Create** button, the Create Results dialog box should appear and confirm that the account was created successfully. When you see this screen, click the **OK** button.



Step 5: Now that the user has been created, click on the **Groups** tab.

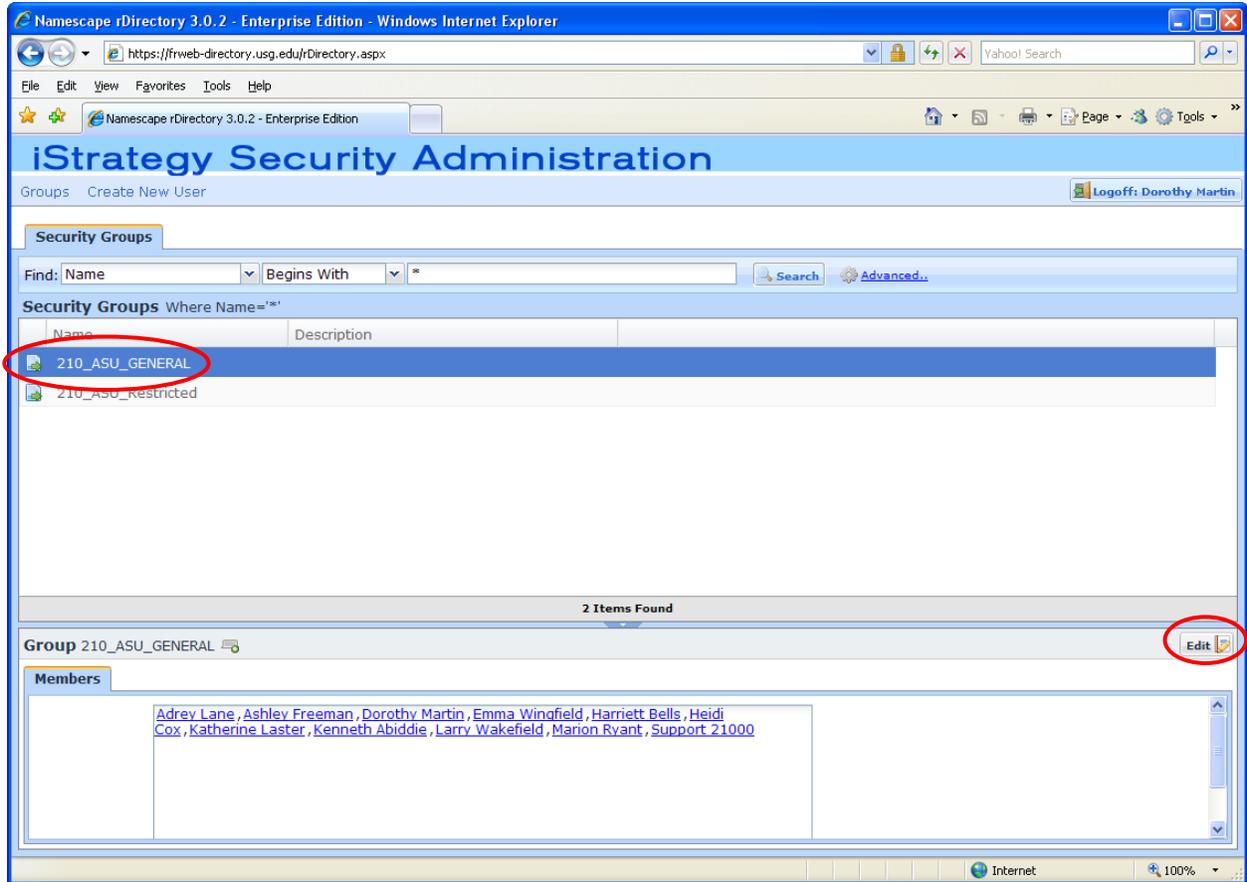


Step 6: Map the user to the correct Group. In this example, the two Groups that we can map the user to are listed below:

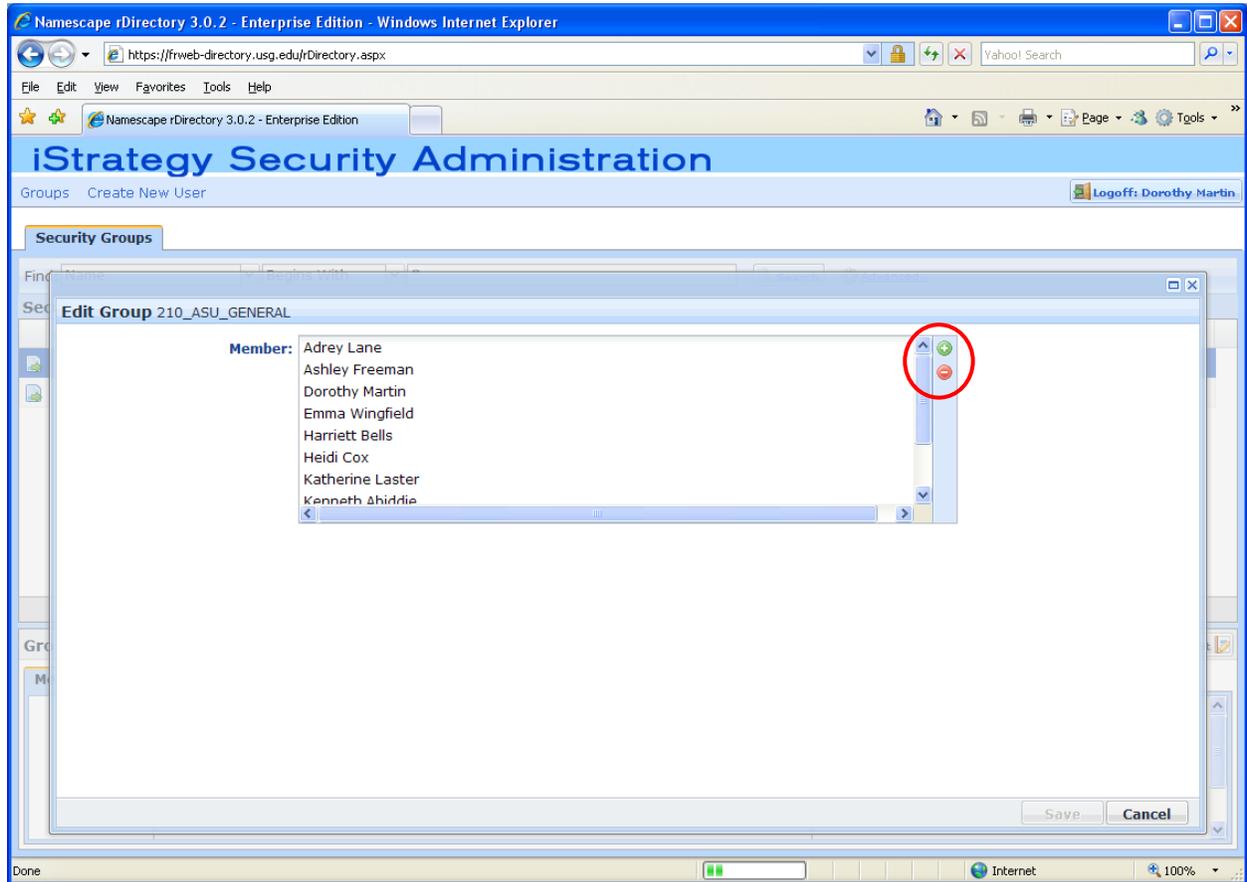
1. 210_ASU_General - *This Group allows full access to all departments for the Business Unit.*
2. 210_ASU_Restricted - *This Group will restrict the user to the departments specified for the user in the iStrategy Department Security page in PeopleSoft (More information about Department Security is located in the Department Security section of this guide on page 15).*

Note: There will be similar groups for all Institutions that are using iStrategy. For example, USO's Administrator will see two groups – one for 980_USO_General and one for 980_USO_Restricted. Users should only be granted access to one Group (xxx_xxx_General or xxx_xxx_Restricted). If a user is part of multiple groups then it will cause security issues.

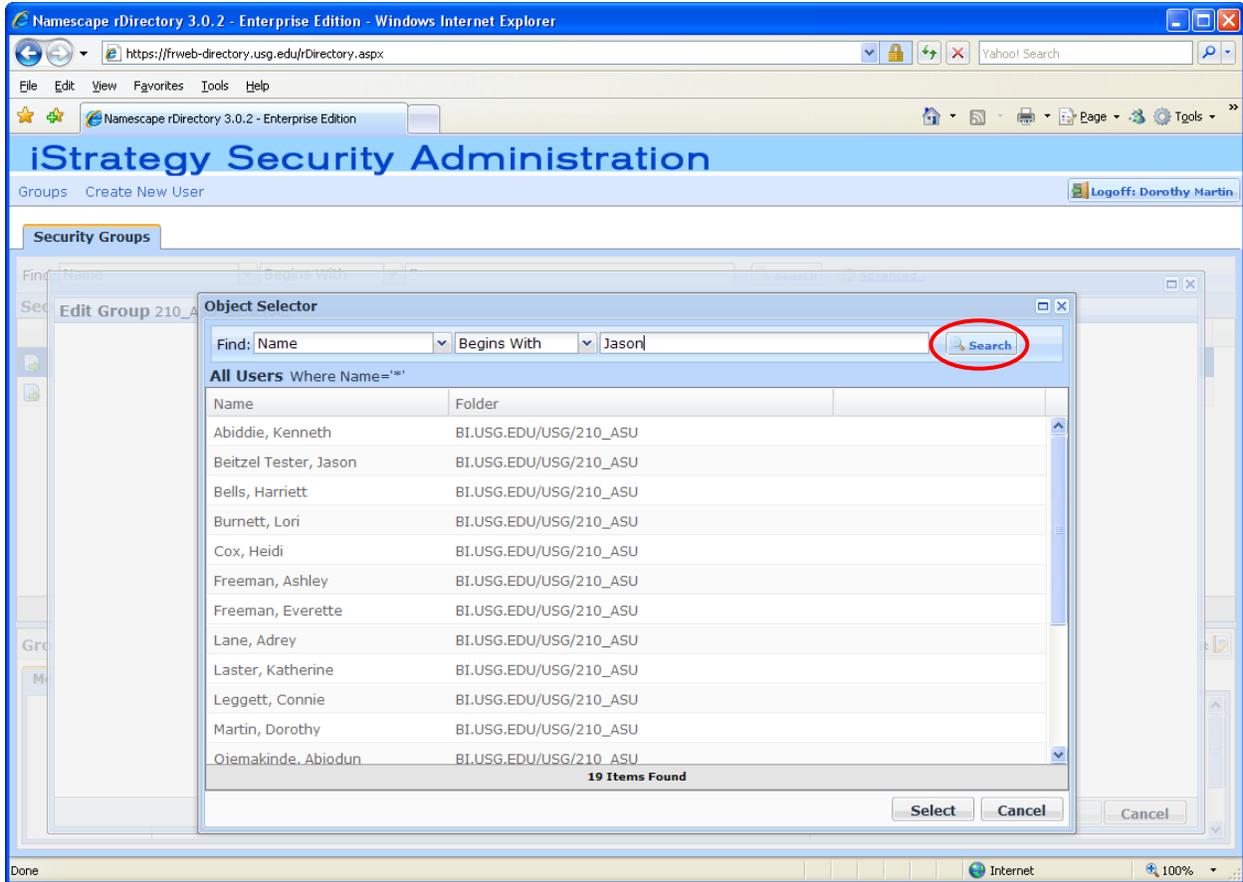
To map the test user to a group, click on the **Group Name** that you would like to add the user to and then click the **Edit** button on the bottom right of the screen.



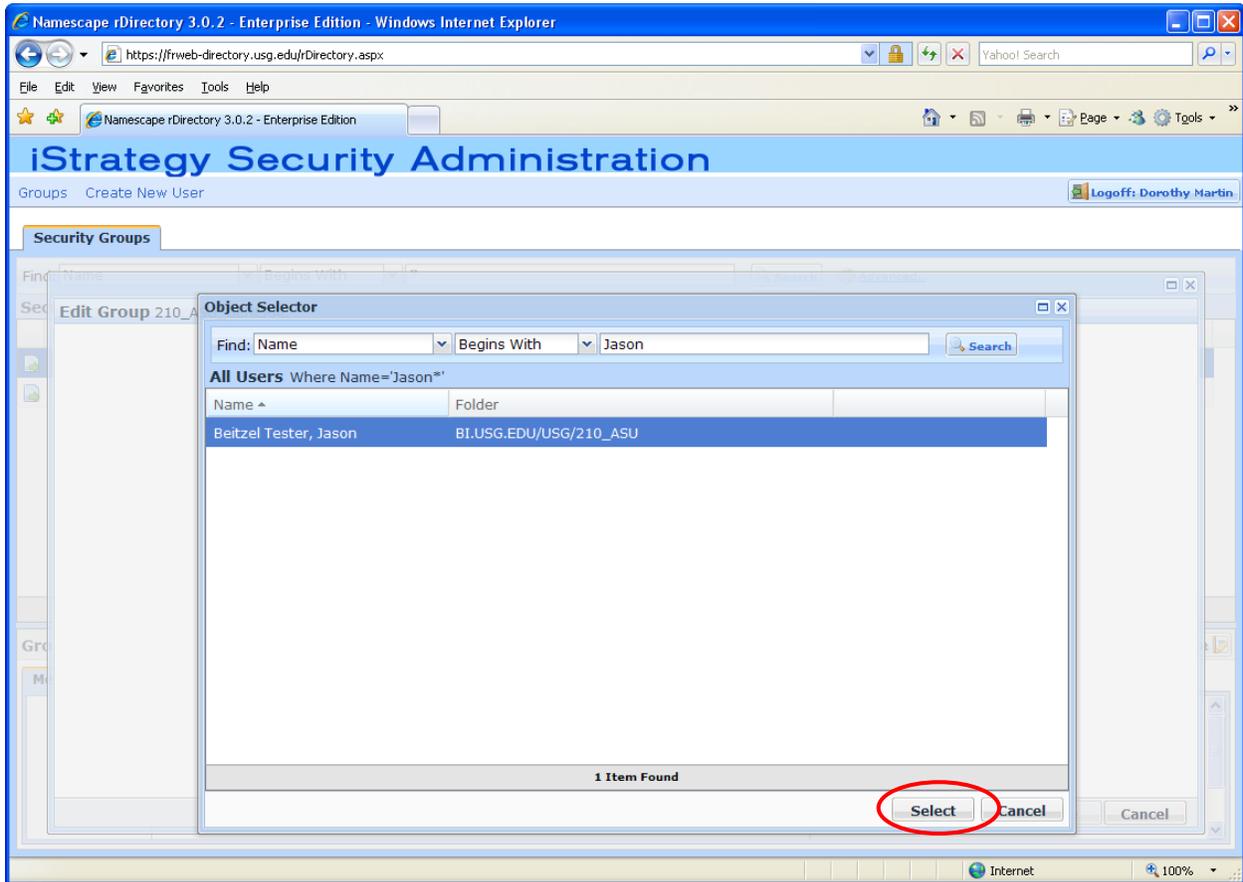
Step 7: To add a new member, click on the green plus symbol (+).



Step 8: Search for the user you just created by using the search engine. Type in the name and select the **Search** button.

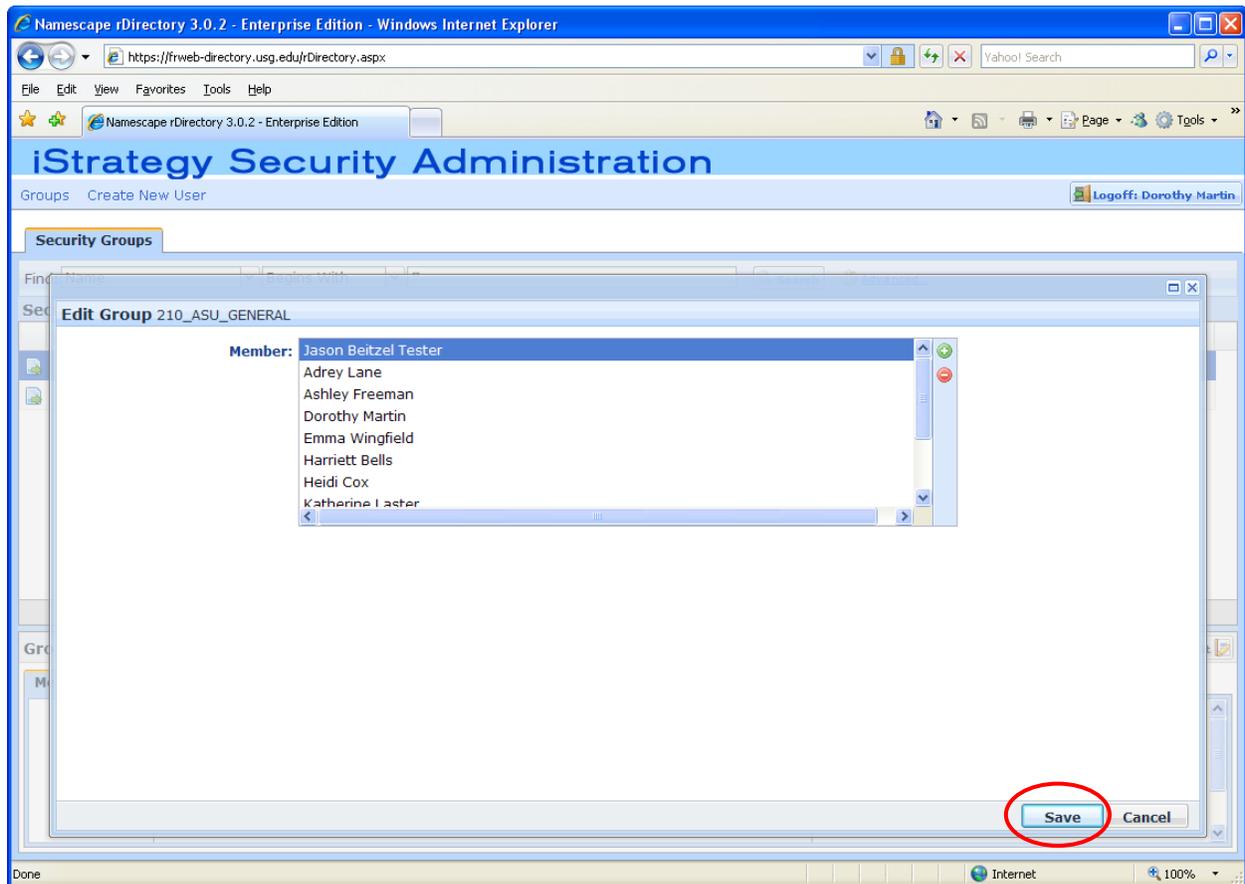


Step 9: Find the user you created and then click on the **Select** button at the bottom right of the screen.



Note that the user **Jason Beitzel Tester** has now been added to the 210_ASU_General Group.

Step 10: Click **Save** and then logout of the application.



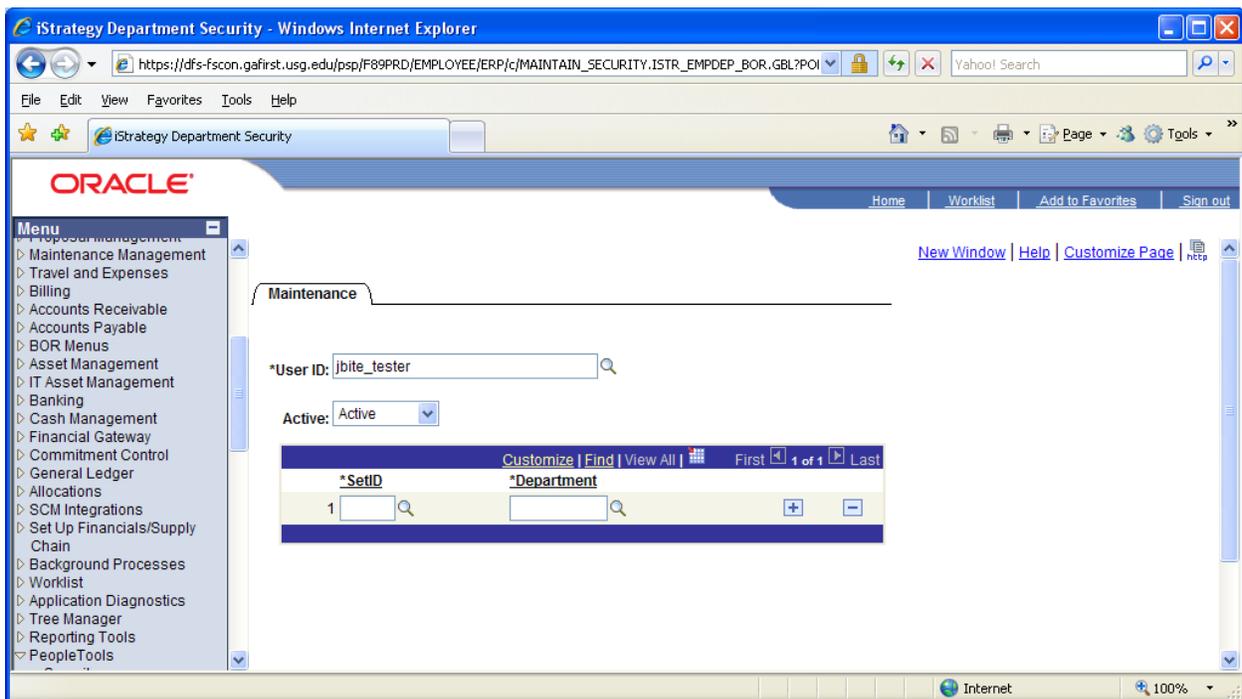
Notify the user that their account has been created. Provide the user with the following:

- (1) User logon name and password.
- (2) URL to access iStrategy and MyPassword (<https://frweb.usg.edu>).
- (3) The new user should choose the Edit my Profile option and set up security questions and answers in order to utilize iStrategy Self-Service for password maintenance.
- (4) Next, the user should select the Change my Password option in order to change their password from the one assigned by the iStrategy Administrator.
- (5) Now the user can return to the main URL and select the iStrategy button to continue to the iStrategy Login. Remind the user that when logging in, the User name to be entered is the User logon name prefixed with "bi\" . For the new user created in this guide, the user must logon using: bi\bite_tester.

Department Security – Additional Step

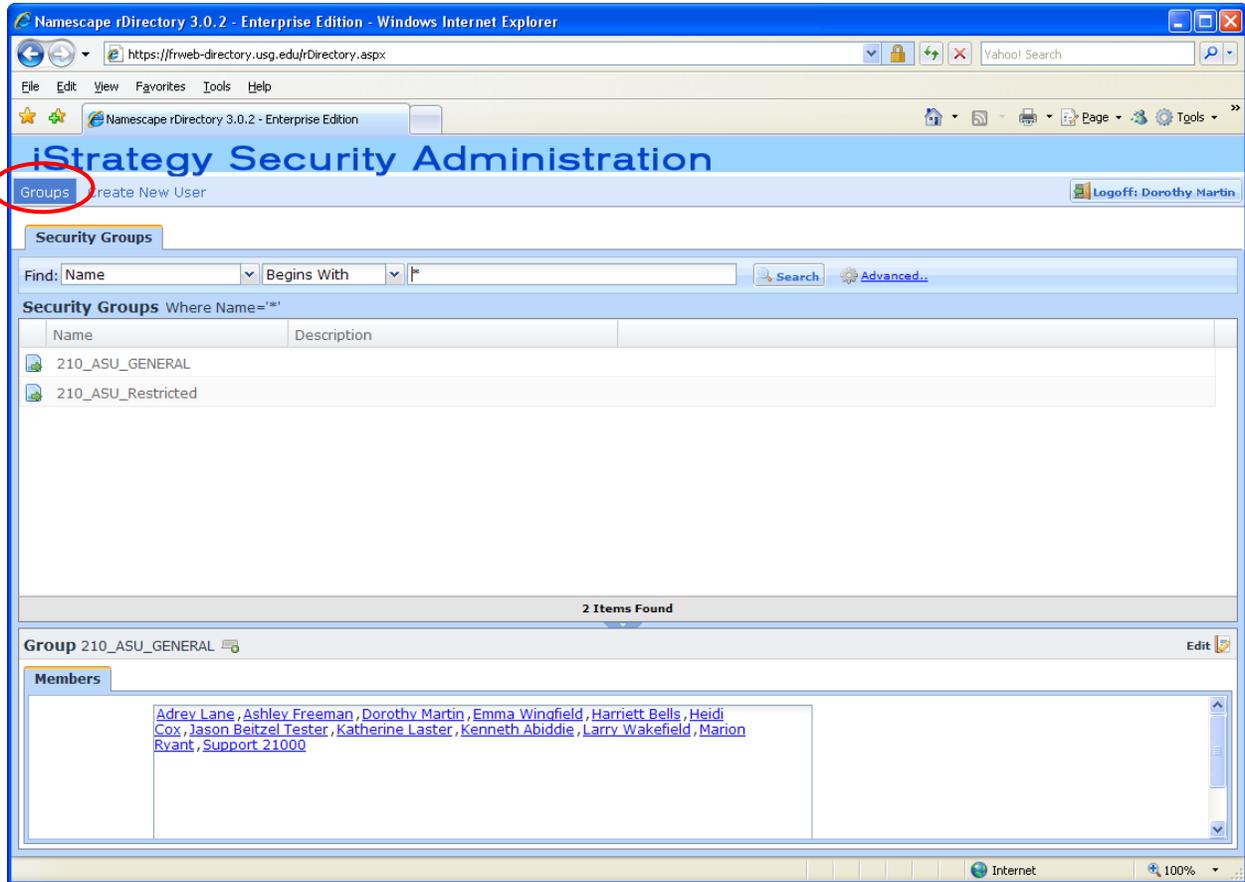
If an Administrator adds a user to a Restricted (Department Security) Group, then he or she will need to ensure that the user's department security is set up in PeopleSoft on the iStrategy Department Security page. Once the security is set up in PeopleSoft, it will feed over to iStrategy the next business day. This is one of the reasons that the iStrategy logon name (**jbite_tester**) must match the user's PeopleSoft User ID (**jbite_tester**).

Please Note: All PeopleSoft security administrators have access to the iStrategy security administration page in PeopleSoft by default. However, if your iStrategy security administrator is not also a PeopleSoft security administrator then you can grant them access to the 'BOR_PT_ISTRATEGY_DEPT' role in PeopleSoft and they will have access to the iStrategy security administration page only. This new role was added as part of the PeopleSoft 2.31 release on 3/31/2012.

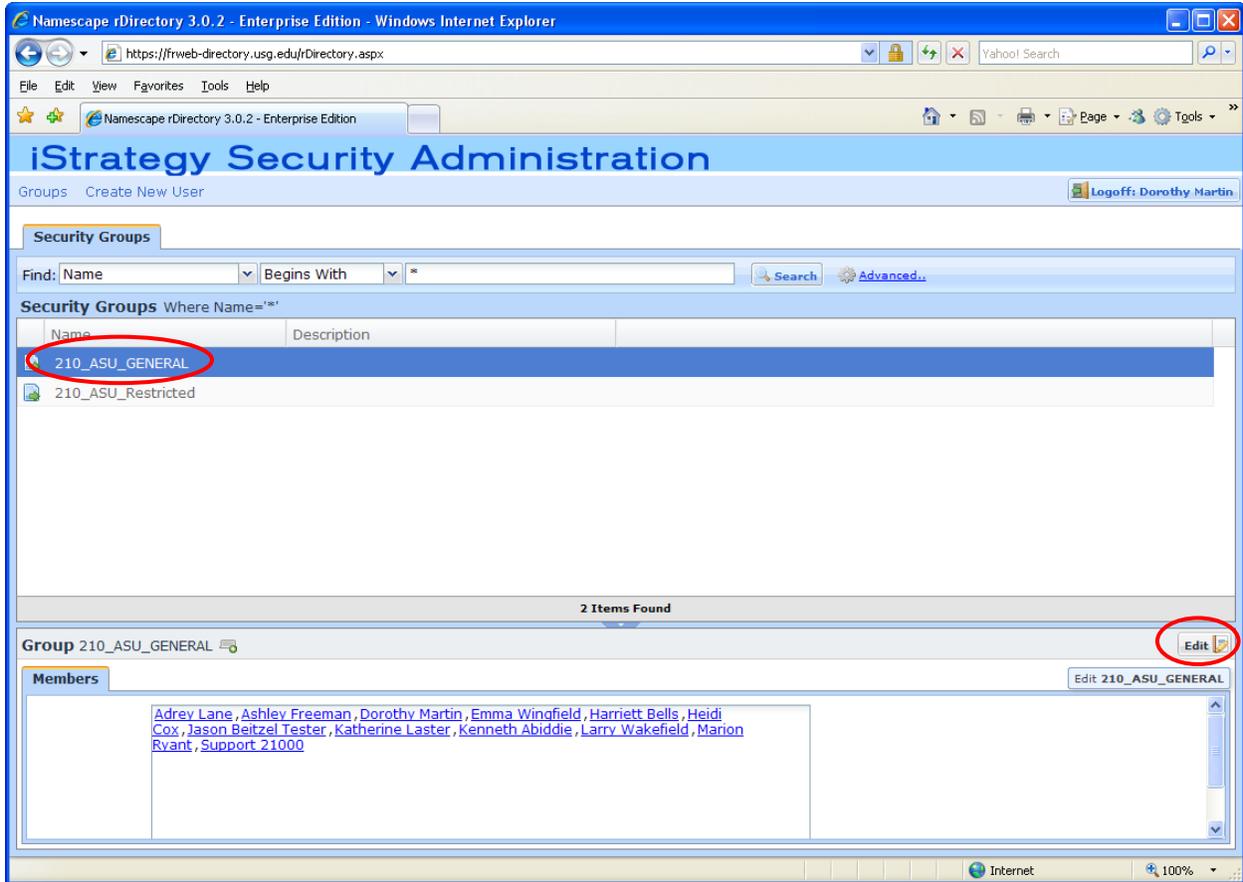


Removing a User from a Group

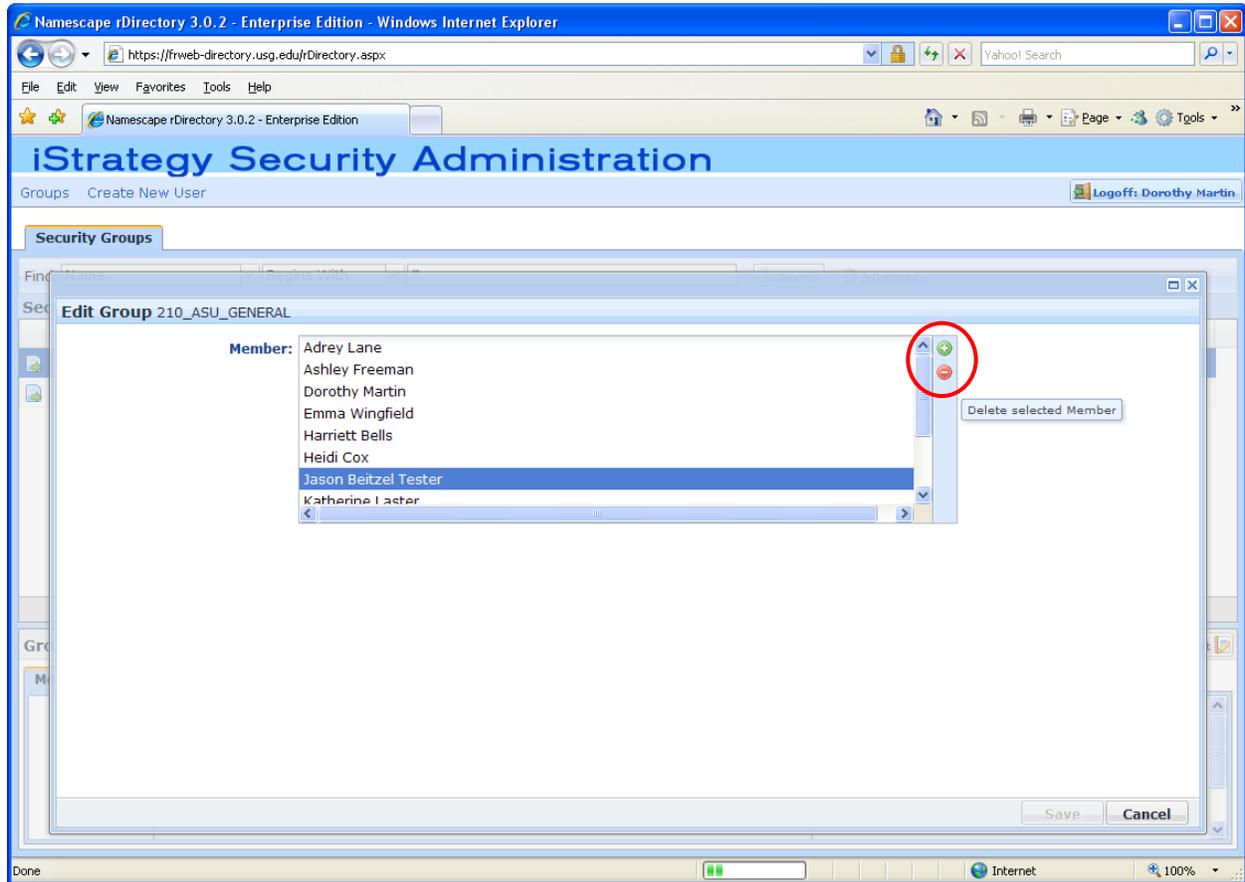
Step 1: Login to <https://frweb-directory.usg.edu> and click on the **Groups** tab.



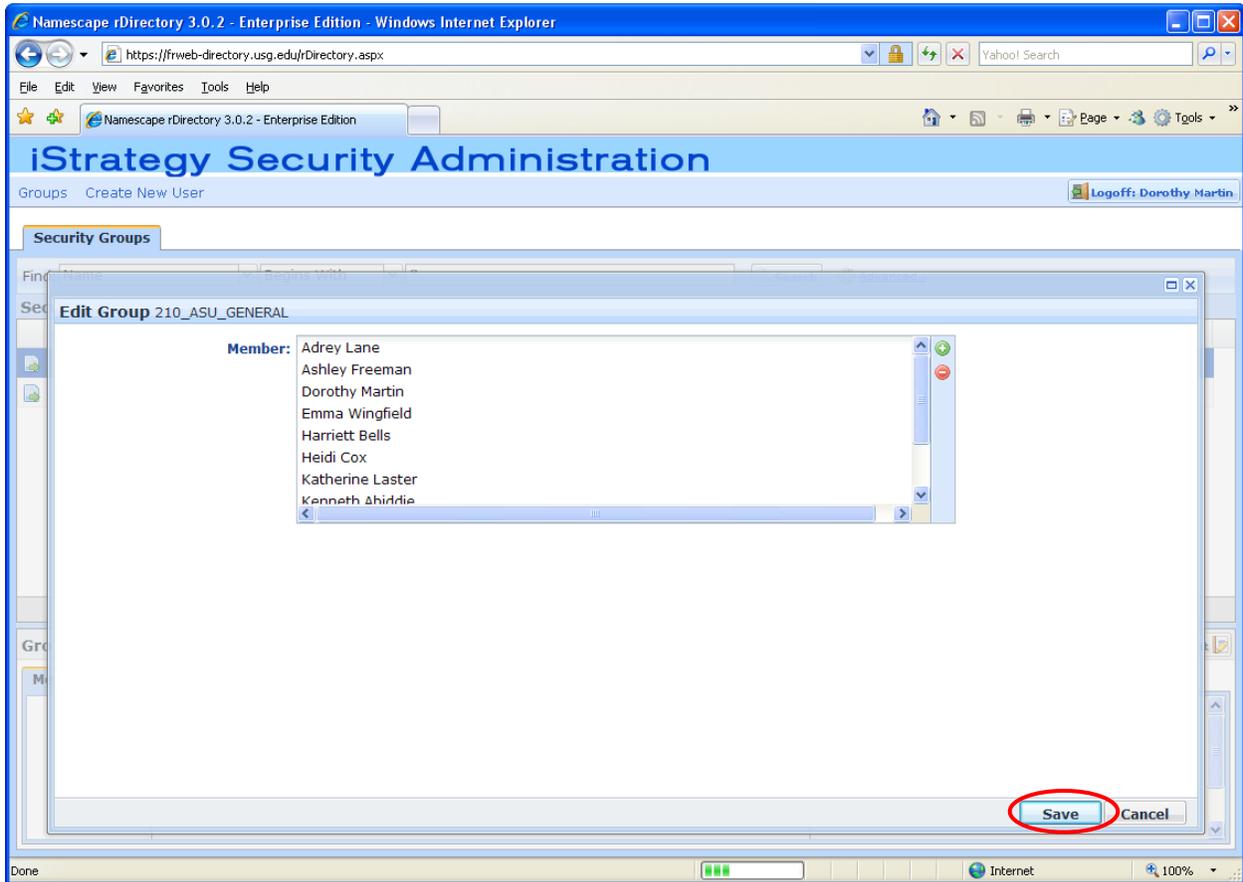
Step 2: Select the **Group Name** that the user is mapped to, then select the **Edit** button on the bottom right of the screen.



Step 3: To remove the member, select the user to remove and click on the red minus symbol (-).



Once the user is removed, select the **Save** button.



Changing Groups for Existing Users

To change a user from a general Group to a restricted Group or vice versa, first complete the steps listed above to remove a user from a Group (pages 17-20), and then complete the steps to add the user to a new group (pages 10-15).

Note: Users should only be granted access to one Group (xxx_xxx_General or xxx_xxx_Restricted). If a user is part of multiple groups, then it will cause security issues.

Existing User Account Maintenance

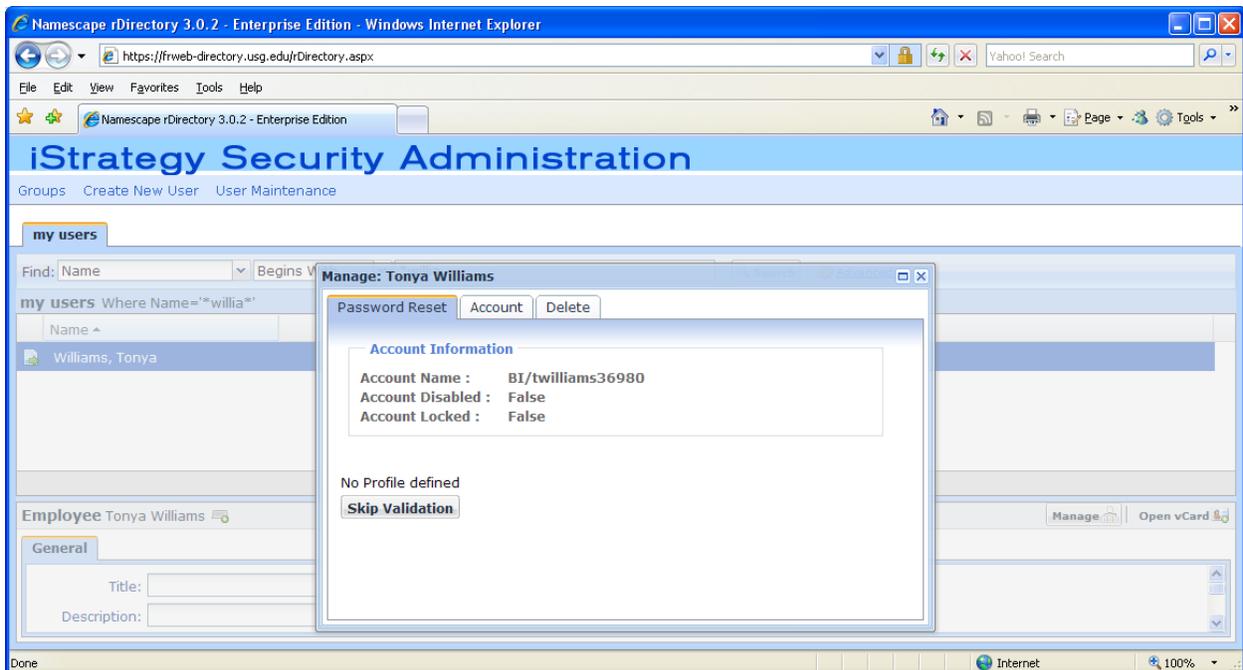
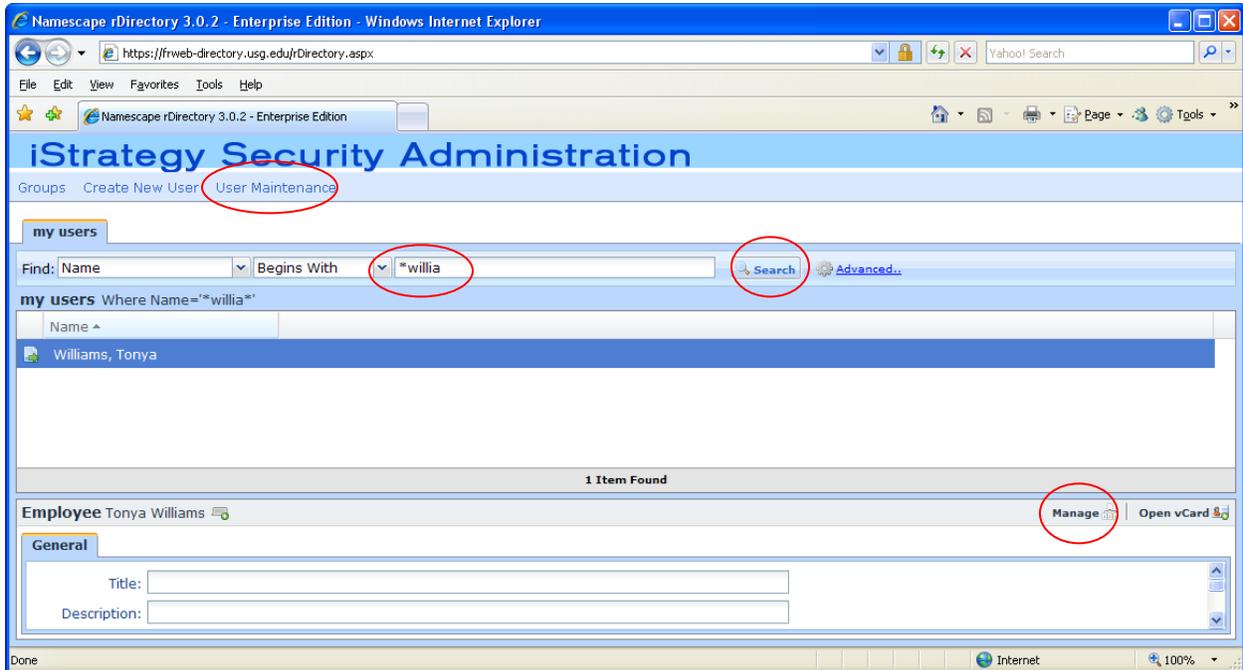
iStrategy Security Administrators can perform maintenance for existing users including password resets and disabling or enabling, unlocking, and deleting user accounts. Following is an overview of when and under what circumstances a security administrator might need to perform these types of maintenance:

- **Password Resets:** This will be necessary if a user has not set up their profile security questions or cannot remember the answers that they provided
- **Disable or Enable Accounts:** This is useful for users with temporary employment status changes as an alternative to deleting and re-adding a user at a future date.
- **Unlock Accounts:** Accounts will become locked after successive failed attempts to logon. Users who have set up their profile security questions may reset their password and unlock their own account. Please be aware that locked accounts will become automatically unlocked after an undisclosed period of time. For this reason, it will be infrequent that a security administrator will need to unlock an account. Security Administrators cannot lock accounts but can disable accounts as noted above.
- **Delete Accounts:** As part of managing user accounts, Security Administrators will need to delete user accounts. Generally this will be necessary when a user has had a change in employment status but this might also be necessary in order to get a user set up correctly to use iStrategy. Common errors requiring that an account be deleted and re-created include users whose iStrategy User ID does not match the user's PeopleSoft User ID and users for whom multiple accounts have been accidentally created with multiple User IDs.

Select the User Account and Access the Manage Dialog Box

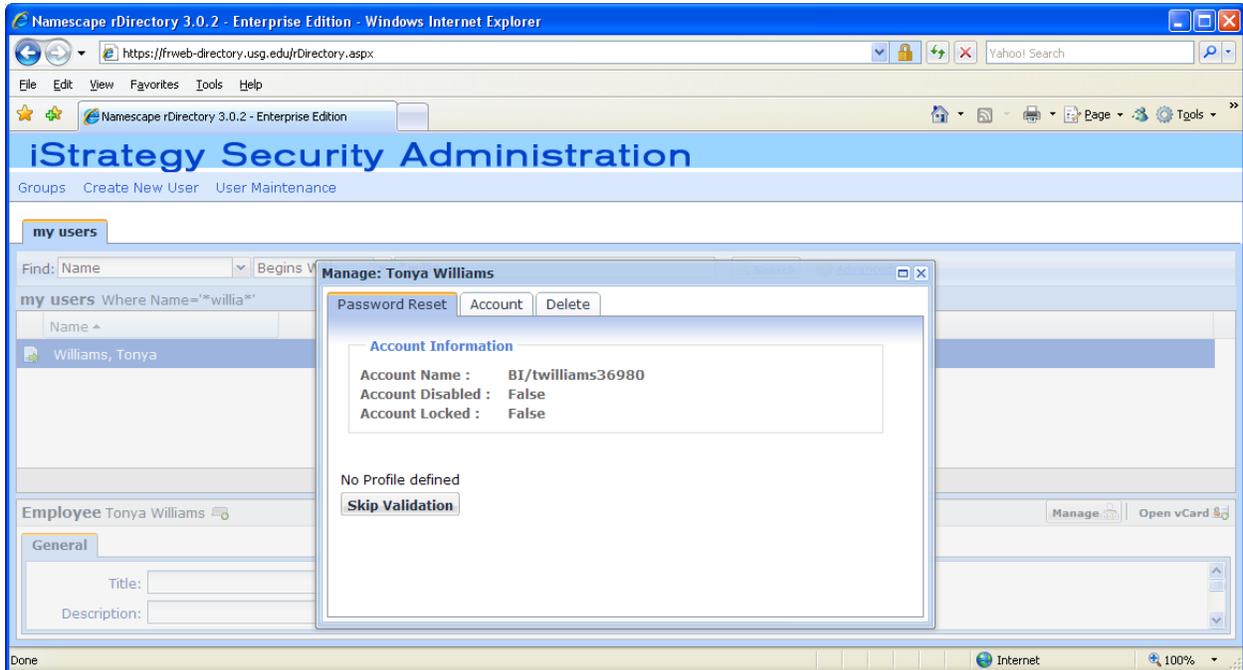
In order to perform maintenance on an existing user's account, log into iStrategy Security Administratorion (<https://frweb-directory.usg.edu>) and access the Manage dialog box as follows:

Select the **User Maintenance** tab. Retrieve the user by using the Find functionality. Input search criteria (Name or User ID) and then click Search. Select the user by highlighting the name in the search results and click on the **Manage** button. The Manage dialog box will display as shown below.

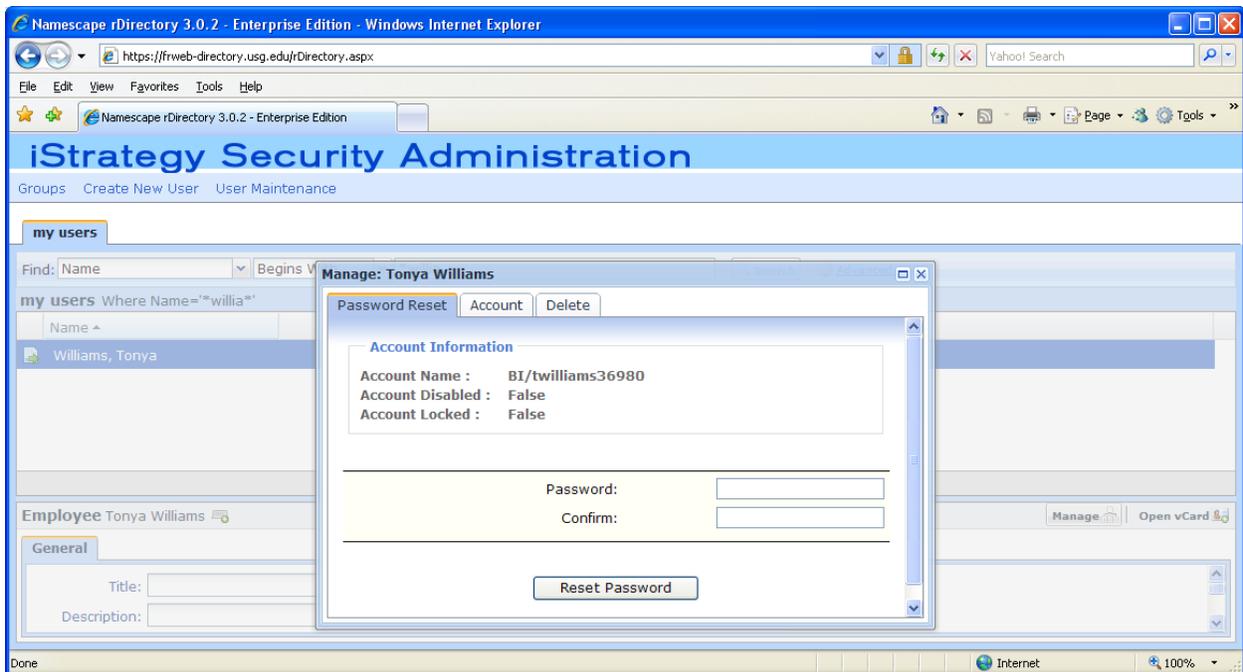


Reset Password

On the Manage dialog box for the selected account (refer to page 22), select the Password Reset tab (if it is not already selected by default) and click the **Skip Validation** button.

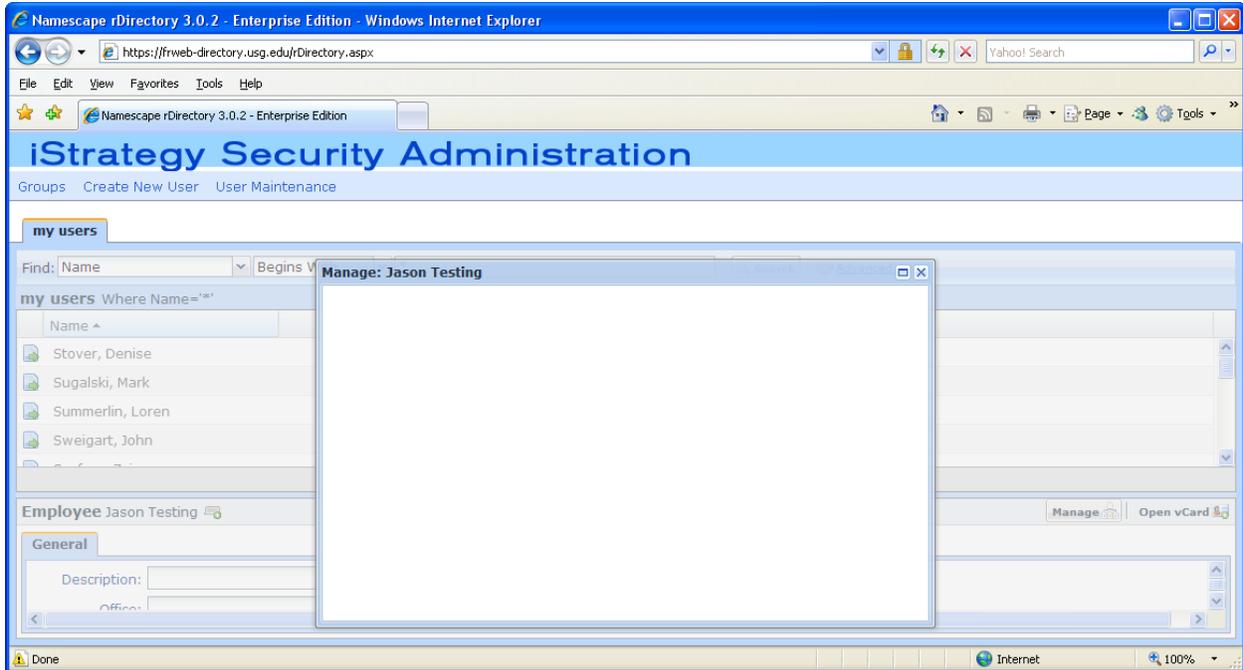


Enter the new password in the **Password** and **Confirm** boxes and then select the **Reset Password** button.

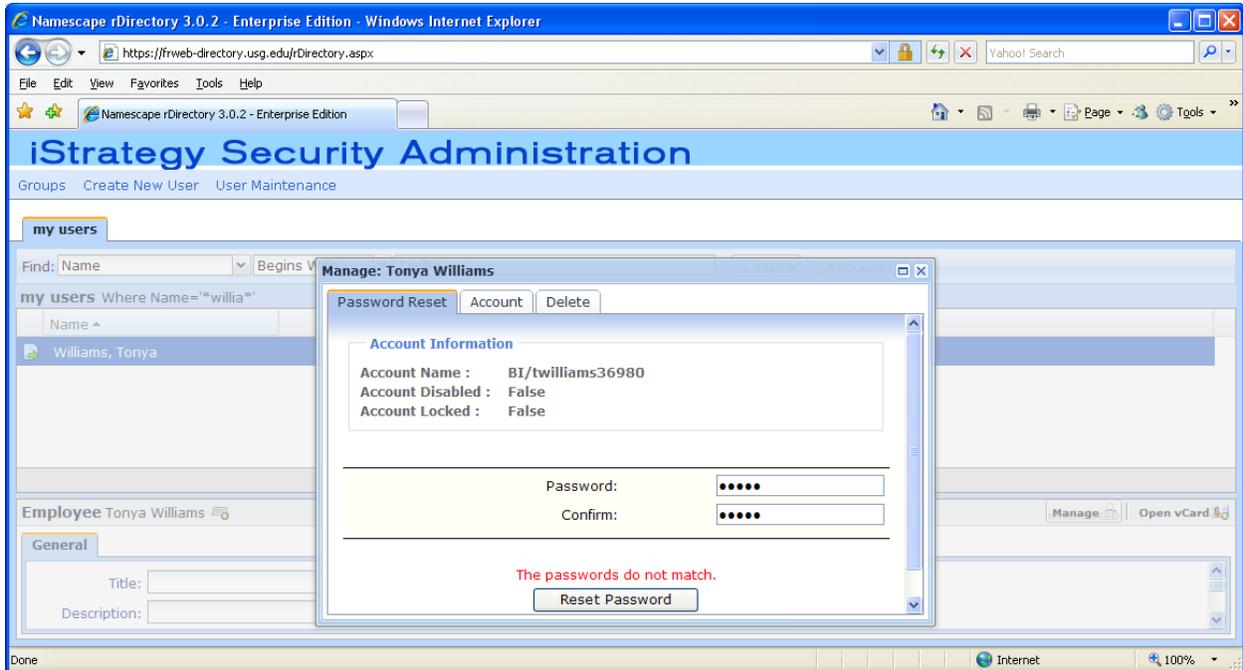


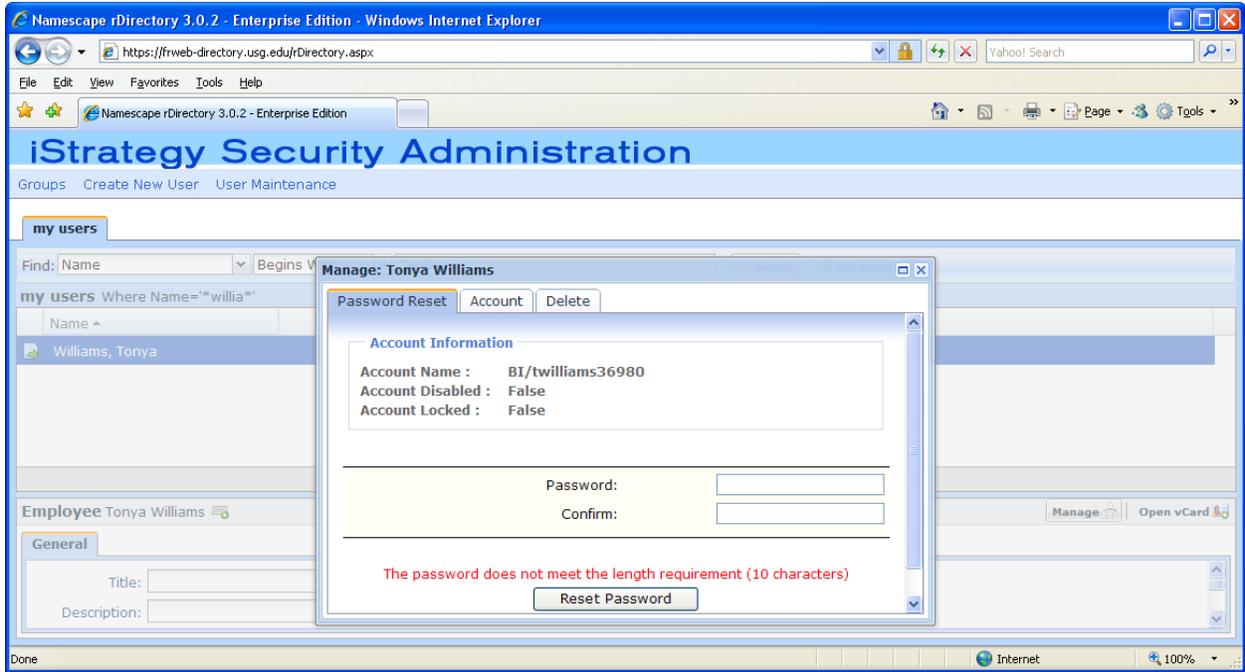
Once you select **Reset Password**, a white screen will appear if the password reset was successful. If the password change was unsuccessful then you will get an error message.

Successful



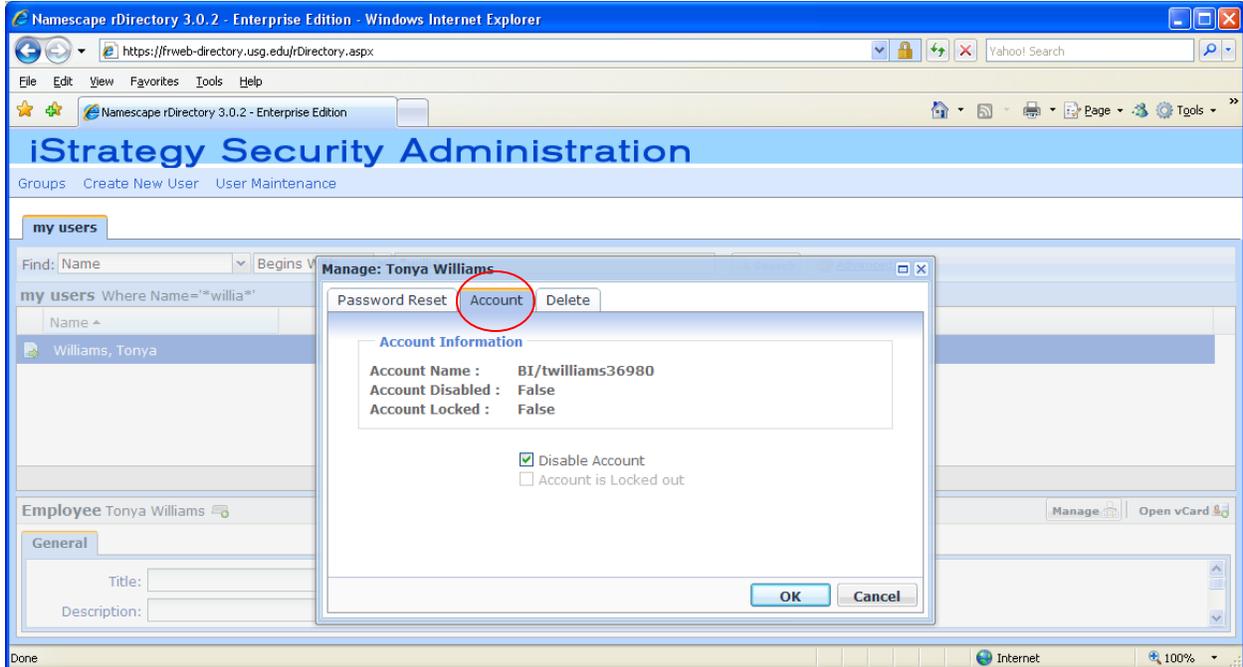
Unsuccessful



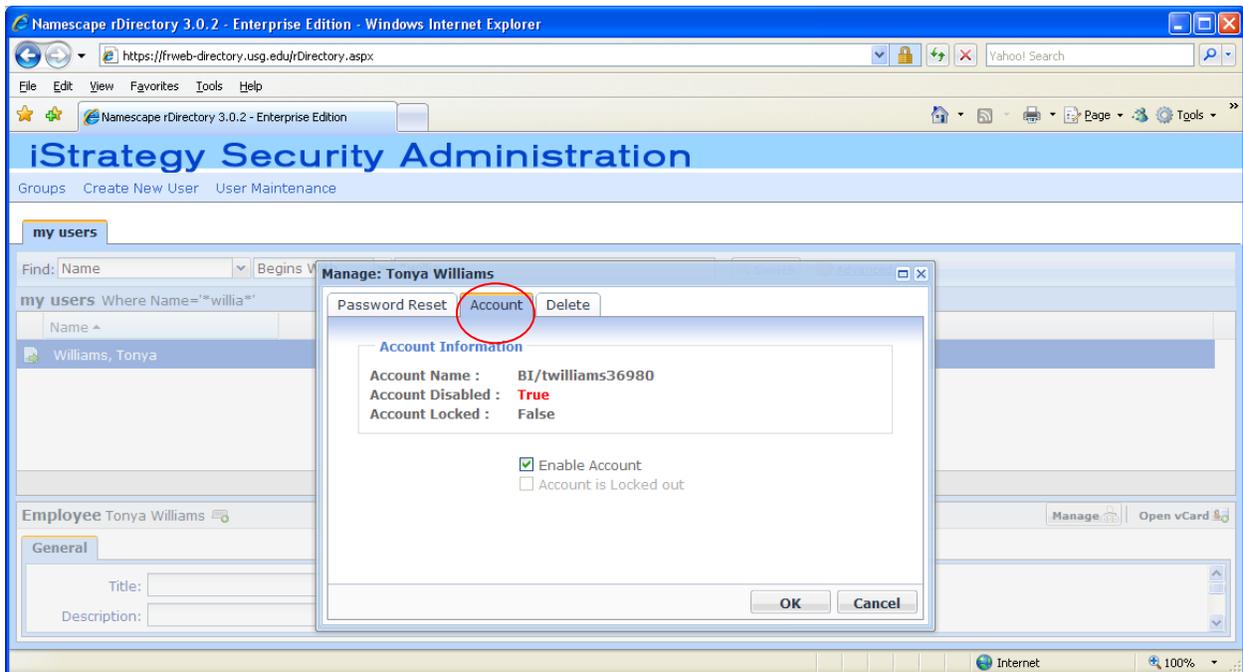


Disable/Enable User Accounts

On the Manage dialog box for the selected account (refer to page 22), select the Account tab. The options available for action relate to the status of the account. To Disable a User Account select the **Disable Account** checkbox and click **OK**.

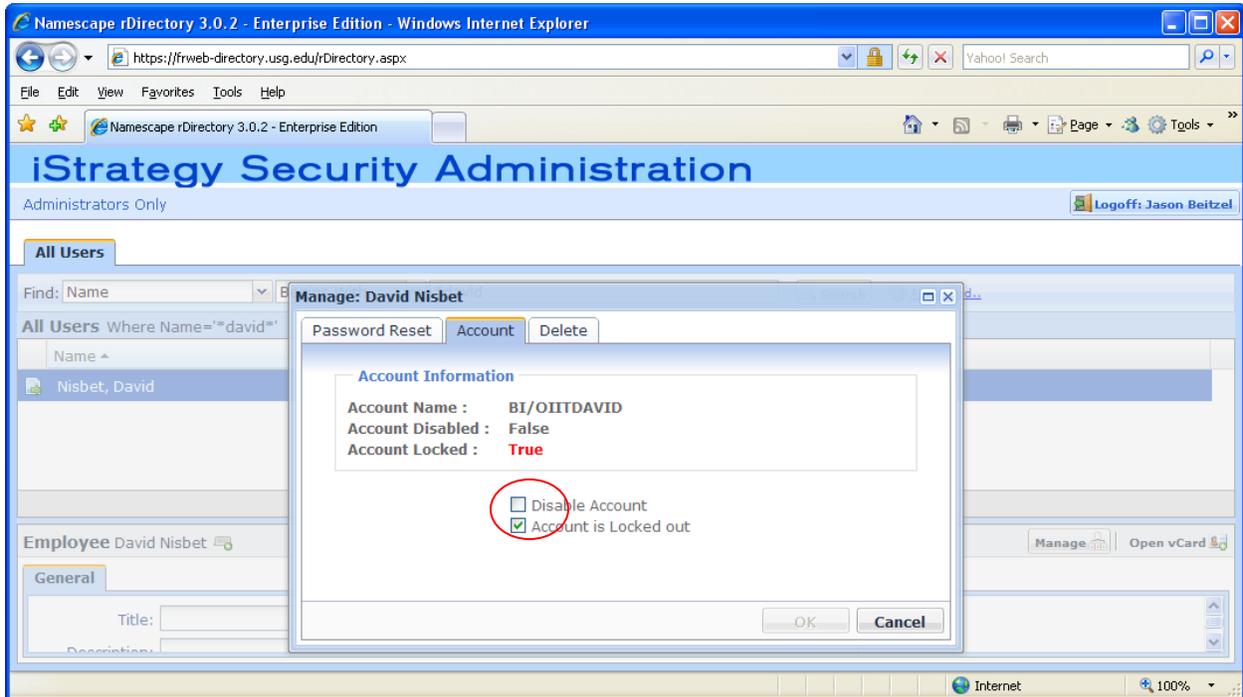


To enable a disabled account, check the **Enable Account** checkbox and select **OK**.



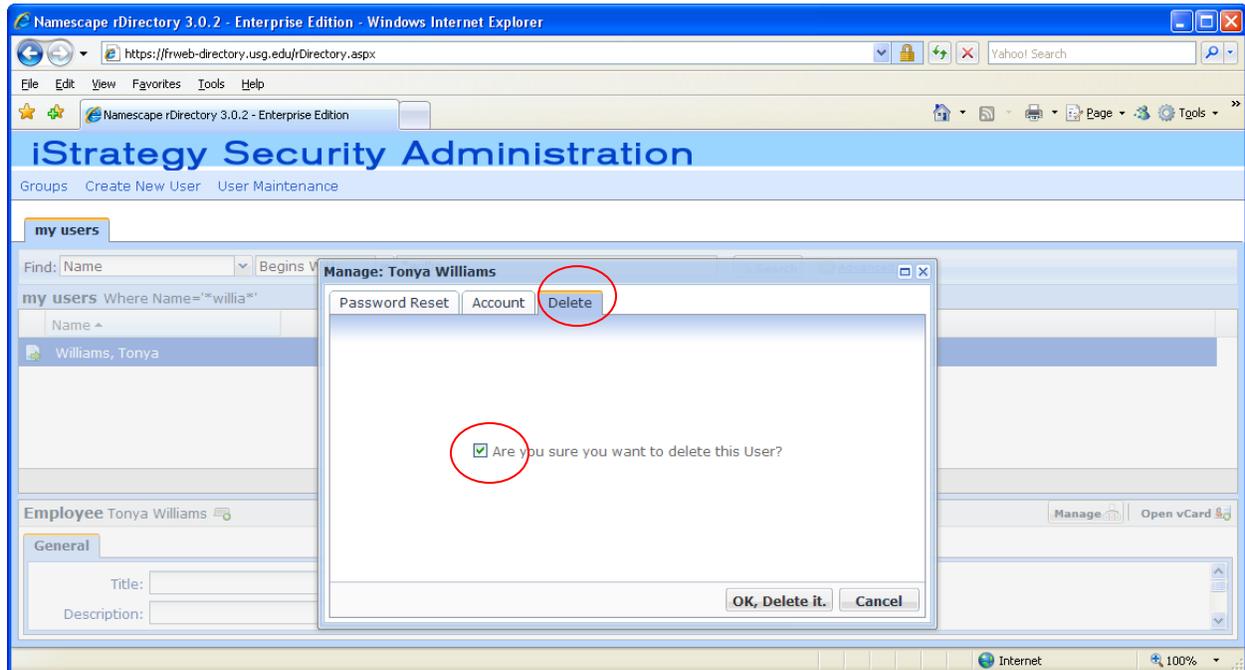
Unlock Accounts

On the Manage dialog box for the selected account (refer to page 22), select the Account tab. The options available for action relate to the status of the account. If a user's account is locked the **Account Locked:** will display as True and the **Account is Locked Out** check-box will be checked. To unlock an account, uncheck the **Account is Locked Out** check-box and click **OK**.



Delete Accounts

On the Manage dialog box for the selected account (refer to page 22), select the **Delete** tab and then click the checkbox next to **Are you sure you want to delete this user?**. Then, select the **OK, Delete It** button to confirm.



iStrategy Self Service

- **New iStrategy User Setup** – Refer the user to the **Institution Contact List.xls** file located at <http://www.usg.edu/gafirst-fin/istrategy>. The Administrator at the institution now has the ability to set up this user.
- **Password Requests** – Refer user to the iStrategy website <https://frweb.usg.edu>. Here the user can select the MyPassword link and change their password that was provided by their iStrategy administrator or reset his or her password for iStrategy.
- **To subscribe (request to join) or un-subscribe (leave) the usg-istrategy-L Listserv managed mailing list**
 1. Go to <http://www.listserv.usg.edu/>
 2. Select the "Browse, Subscribe, Post, Search..." link
 3. In the "List name:" box (on left-side of the screen) type usg-istrategy-L (not case sensitive)
 4. Click the "GO!" button.
 5. Select the "Join or leave the list (or change settings)" link
 6. To request to join enter your e-mail address and your name; to leave enter your e-mail address only
 7. Click on the "Join the list" or "Leave the list" button
 8. Check your email for a message; click the link in the message to confirm or complete your mailing list subscription status
- **All other requests** will continue to be routed to the iStrategy team via a helpdesk issue.

MORE INFORMATION and SUPPORT: For a production down, business interrupting (emergency) situation, call the ITS Helpdesk immediately at 706-583-2001 or 1-888-875-3697 (toll free within Georgia). For anything else, contact the ITS Helpdesk at http://www.usg.edu/customer_services (self-service support request requires a user ID and password, contact the ITS Helpdesk to obtain self-service login credentials) or e-mail helpdesk@usg.edu.

ADDITIONAL RESOURCES: For information about ITS maintenance schedules or Service Level Guidelines, please visit <http://www.usg.edu/oiit/policies>.