

Advantage Security Application Instructions

The Security Application form must be completed to request the set up of new users, as well as to update information of existing users in the Advantage system and Fortis.

At the top of the form, indicate whether the information submitted is a request for a New user, an Update for an existing user's access, Reactivate a user that was inactivated based on lack of use, Name change for an existing user, or Inactivate a user to remove access to Advantage and Fortis. Also, a user is considered new if he/she is new to your department.

Enter the user's entire permissions, not just updates since each application is considered the latest access for a user.

Completing the Application:

User information section is required for all users. Provide User Name, Email Address, Phone, and Locality (Department/Division). If the request is for a name change, enter the new and old name in the appropriate fields.

Incumbent Replacement

This section is to provide the name of the user being replaced with a new user so that the old user's access can be disabled.

Organization Access

Enter the user's home department. Only Service Center A (GGSC) will be allowed to enter department 18K. All other Service Centers should enter 18K as a foreign department (org) in the Financial or Procurement Security sections.

Users that do not have approval rights can still use the worklist to manage documents that have been rejected back to them for editing.

DocuWare Access

Select DocuWare if the user needs access to print and view system generated reports in DocuWare. View is to view APDoc and Reports. Manage Unmatched allows users to view documents that have not been matched with Advantage yet. Review allows users to manage documents rejected by OSC staff. DocuWare only means the user ONLY requires DocuWare access and not Advantage. This access can take 3-5 days to activate after the user is setup in Advantage.

Vendor/Customer

Data Enter VCC and VCM document for Vendors. ANY role provides access to process for Customer and view VCUST table.

BIE Access

Batch Interface (BIE User) – Enter data on the BIE table for interface documents.

Financial Document Access

If the user processes financial transactions, complete this section by entering all foreign department access or select the name of the Service Center for data entry and approval of documents (CORR, DHHS, DOT, GGSC, LEG, NRSC, SESC, or SOS). Select the functional areas that are necessary for the user along with the access rights (Data Enter, Approve or View only). Selecting All Financial Access, will grant access to all financial documents.

Note: A user can have both data entry and approval rights in a functional area. This is allowed because self approval of documents is restricted. If the user should have access to the Manager Worklist to reassign tasks, select the **Worklist Manager Access** checkbox. Be aware that any user that edits a document will not be allowed to approve it.

Accounts Payable - Process ABSJ, CEC, COAJ, GAE, GAEC, GASA (Education only), GAX, IN, PRC documents. Access: CHREC, DISBDQ, DISBQ, & PDCHK tables. Copy forward from a BPO, CT, DO, PO, etc. Approvers have the rights to update the CNTAC table.

Accounts Receivable – Process RE & CL Documents. Update access to the AR Tables BPRO, BILLR, COLL, CUSTA, DNGM, FCEG, INVQ, RESTA, RCHT, STMTQ, etc. Approvers have the rights to update CNTAC table.

Cost Accounting – Process BGPDR, BDPHR, CAS, JVC, CH. Approvers have the rights to update tables: PROG, MJPRG, PHASE, PHPRG, etc.

Cash Receipts – Process CR, CRAJ, CRCC, CREF, CRNG, CRRT, BAC, TRF documents. Access BNKTR, CRSRCH, & DPRF tables.

Fixed Asset – Process FA, FC, FD, FE, FI, FM, FP, & FX documents. Access FARHDR, FARCOMP, FARACTG, FAHIST, FATP, FAPR, FACPA, etc.

JV & IET – Process JV & IET documents. This includes the IET to pay an intergovernmental RE.

REMS (Receivable Management System) – REMS GGSC is for the General Gov't service center users in order to process billings. REMS (User/View/OIT) - User role is for users who will make payments to Internal Service Billings, View is view only access to the REMS tables, and OIT is for the OIT user to have view rights to the REMS tables.

ANY Role - Viewing Amendment HIST, Alerts, Broadcasts, Budget Documents, BQ39, BQ40, BQ90, CACT, Cited Authority, Commodities, COA Tables (ACTV, OBJ, BSA, RSRC, etc), CNTAC, BBAL, CBAL, LINQ, ITEM, PLOC, UOM, Terms & Cond, URSRCH, VCUST, VCC & VCM for Customer, & Worklist

Foreign Department Access - If the user has access to departments other than their Home Department, select the appropriate departments for Viewing, Entering and Approving.

Procurement Access

If the user processes procurement transactions, complete this section by entering all foreign department access or the name of the Service Center for data entry and approval of documents. Select the appropriate access rights (Data Enter, CT Data Enter, Approver, Dept Designee)

Note: A user can have both data entry and approval rights. This is allowed because self approval of documents is restricted. If the user should have access to the Manager Worklist to reassign tasks, select the **Manage Approver** checkbox. Be aware that any user that edits a document will not be allowed to approve it.

Data Enter – Process DO, PO, RQN, RQS, & UR Documents. Access to procurement tables such as EXPRT, CORSPD, DCMTM, & MALDO. This role can also view CT, MA, and RQM documents.

CT Data Enter – Process CT documents. Process the same documents and view the same tables as the Data Enter role as well as process post award documents, EV, RFP, and UR Search. View solicitation tables (SOQA, OPSR).

If users need to process Receiving Documents, select the Prepare Receiving Documents box.

Procurement Workflow Access.

If the user needs to approve procurement transactions, complete this section. If you selected that they are a Dept Designee, they will receive the Dept Designee approval role (DESIGNEEAP). Provide the Home and Foreign Departments along with the necessary workflow units. See Appendix E for a list of Workflow Units in the Security and Workflow Manual.

Approval – Approve all procurement documents (DO, PO, RQN, RQS, UR, CT, EV, MA, & RFP's).

Dept Designee – Approve all procurement documents over \$5000 (DO, PO, RQN, RQS, UR, EV, MA, & RFP's). Commodity purchases will still require the Dept. Designee approval.

Other Security Access

This section is for users who need specific access, such as the Office of the State Controller, Division of Purchases, Department of Audit, Office of the State Treasurer, Surplus, Help Desk and using UPDOCS for Spreadsheet uploads.

The application must contain an electronic signature from the User and Supervisor which will submit the application into the Case Management System (CM). Then the Agency Security Coordinator will log into CM and review and approve the application which will workflow to the Office of the State Controller for processing.

New Users that have not had access to the system previously will receive an email from the CM. The email subject line will read: ADVMAIL: Welcome to Advantage!

Users that have had their access changed with receive an email from the CM system.

Security Coordinators have access to the Security Listing by Agency report in DocuWare. This report provides a list of users by department, first name, last name, user id, security roles, workflow roles, and last password change date.

Please see Appendix E in the Security and Workflow Manual for a list of Workflow Units and their descriptions.