Merchant Link

8401 Colesville Road, Suite 900
Silver Spring, MD 20910
(301) 562-5000

User Access Request Form

User Guide to the MerLin UAR Tool

Document Creation Date:	DocInformation:Created
Last Modification Date:	3/10/2011 3:56:00 PM by
Original Document Author:	Clark P. Case
Quality Control:	QA performed on QA Date by Reviewer
Owned by Department:	Learning and Development
Document Owner:	Clark Case
Document Location:	/home/cpcase/Merchant Link/Portfolio/Documentation/User Access Request Form User Guide.docm
Document Version:	0.0.11.0310

This page has been intentionally left blank.

Table of Contents

This page has been intentionally left blank.

Merchant Link

The following table lists all major changes made to this document. Entries give the date the document was updated, the initials of the person updating the document, and a brief description of the change.

Correction of typographical errors and minor or non-substantive changes to the document are not noted in the change log table.

DATE	INITIALS	BRIEF DESCRIPTION OF CHANGE
10-MAR-2011	CPC	Creation of this document.
10-MAR-2011	CPC	Updated the version number noted on the related document **User Access Request Form Requirements.docm** from **0.0.11.0308** to **0.0.11.0310**

Purpose of this Document

This document serves as user guide to the User Access Request tool present in the MerLin intranet. The information contained herein is presented as accurately as possible with the materials available at the time of its creation or modification. Updates to other materials used in the creation of this document may invalidate or make portions of this document obsolete. It is suggested that you use the latest version that is made available by the MerLin Development group.

If you need assistance in locating supporting documentation, or the most current versions of this document, or if you are aware of needed changes to this or any other material, please contact the MerLin Development group, or the authoring department and owner of this document.

Chapter 1
Proposal for the Addition of a User Access Request form

Introduction

On Thursday, March 3, 2011 the MerLin development group was approached by Dan Lane, the COO for Merchant Link with a request to add a request form to the MerLin portal to automate a current process. The User Access Request process is a set of email based requests and authorizations to allow users to request access to tools, systems, and files throughout the organization.

This document provides details on using the **User Access Request Form** tool on the MerLin portal. From this point forward the tool will be referred to as the **UAR**, **UAR Tool,** or **UAR Form**.

Related Documents

The following document(s) contain details related to this project and web tool:

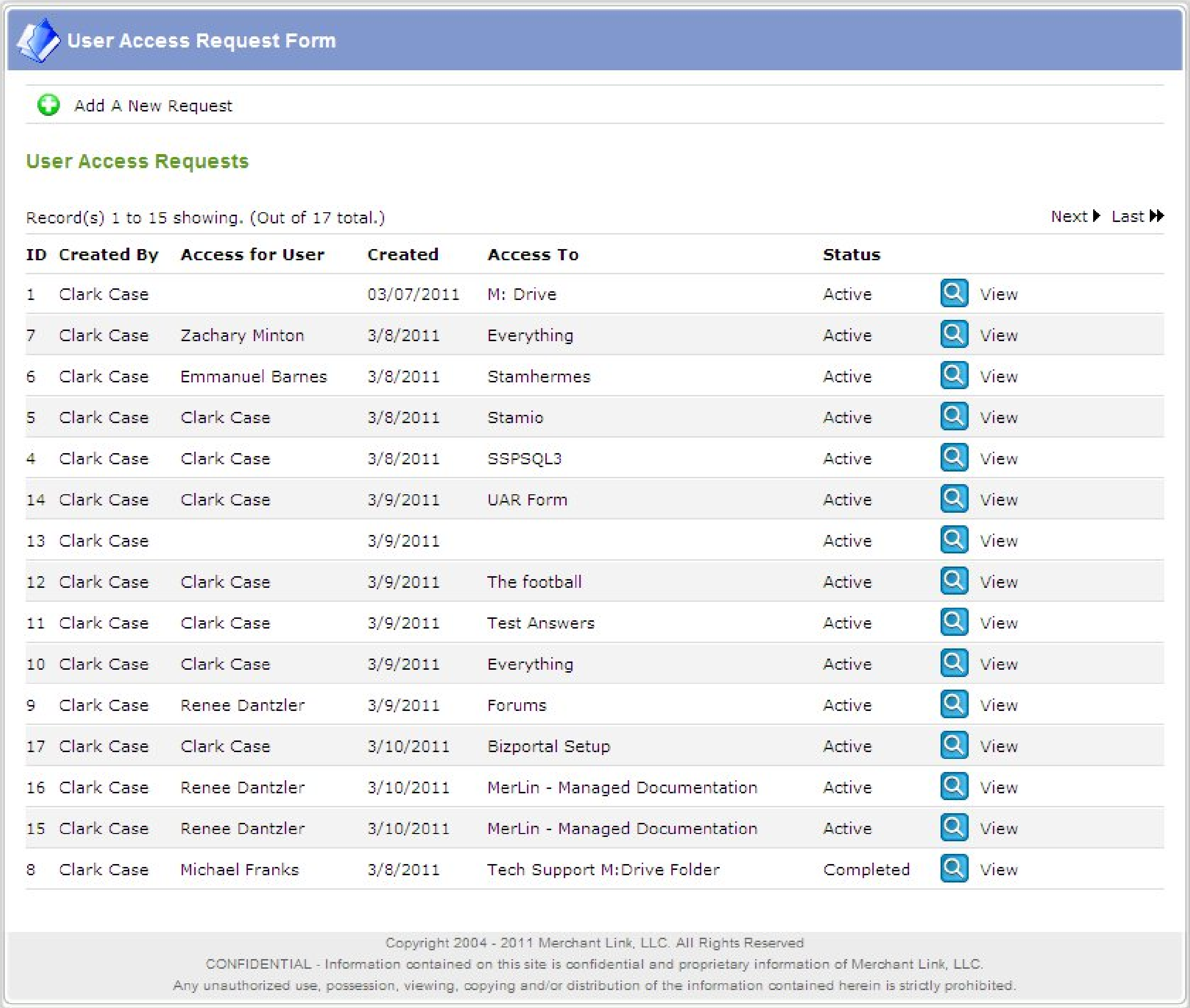
User Access Request Form Requirements.docm (version 0.0.11.0310)

This document provides the functional requirements for the UAR tool. It details the workflow of the processes and procedures for requesting and granting user access and permissions requests. This document is tagged as call number DMS-REQ-2300 and can be accessed at the following URL:

http://***.************.***/MerLin%204.0/modules/docman/dms_details.asp?DocID=2300

UAR Overview

The following is a screenshot of the UAR tool on MerLin. The client is presented with a view of all current and historical UARs as well as a buttons to **Add a New Request** and to **View** the details of a UAR record.



User Access Request Form

Add A New Request

User Access Requests

Record(s) 1 to 15 showing. (Out of 17 total.) Next Last

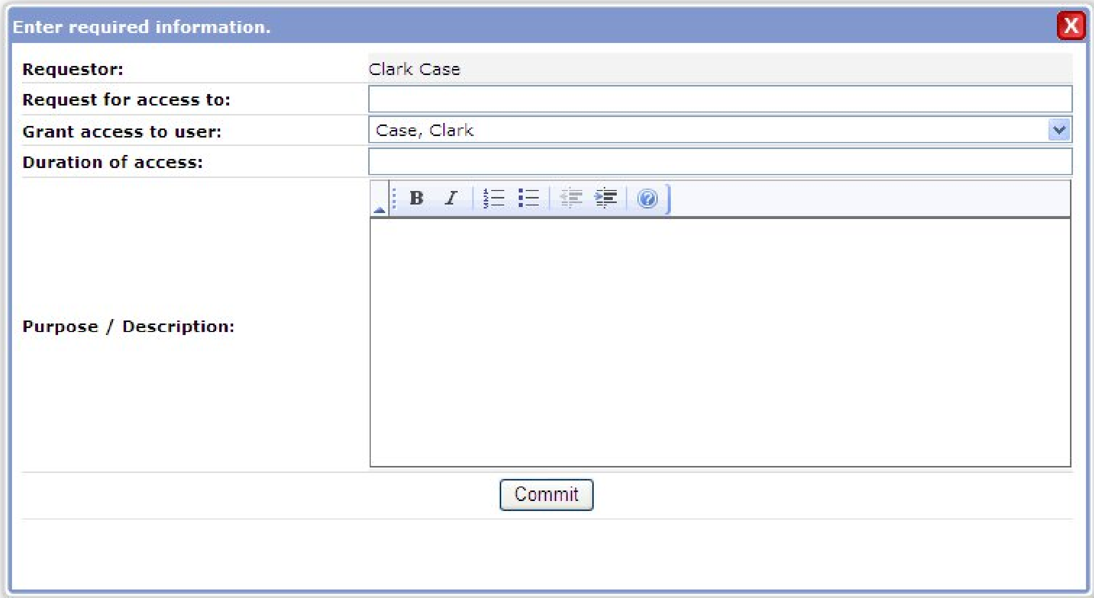
ID	Created By	Access for User	Created	Access To	Status	
1	Clark Case		03/07/2011	M: Drive	Active	View
7	Clark Case	Zachary Minton	3/8/2011	Everything	Active	View
6	Clark Case	Emmanuel Barnes	3/8/2011	Stamhermes	Active	View
5	Clark Case	Clark Case	3/8/2011	Stamio	Active	View
4	Clark Case	Clark Case	3/8/2011	SSPSQL3	Active	View
14	Clark Case	Clark Case	3/9/2011	UAR Form	Active	View
13	Clark Case		3/9/2011		Active	View
12	Clark Case	Clark Case	3/9/2011	The football	Active	View
11	Clark Case	Clark Case	3/9/2011	Test Answers	Active	View
10	Clark Case	Clark Case	3/9/2011	Everything	Active	View
9	Clark Case	Renee Dantzler	3/9/2011	Forums	Active	View
17	Clark Case	Clark Case	3/10/2011	Bizportal Setup	Active	View
16	Clark Case	Renee Dantzler	3/10/2011	MerLin - Managed Documentation	Active	View
15	Clark Case	Renee Dantzler	3/10/2011	MerLin - Managed Documentation	Active	View
8	Clark Case	Michael Franks	3/8/2011	Tech Support M:Drive Folder	Completed	View

Copyright 2004 - 2011 Merchant Link, LLC. All Rights Reserved
CONFIDENTIAL - Information contained on this site is confidential and proprietary information of Merchant Link, LLC.
Any unauthorized use, possession, viewing, copying and/or distribution of the information contained herein is strictly prohibited.

The view displays records sorted first by their **Status**, then by their **Created Date** with the oldest showing at the top. The view displays 15 records at a time in a paged view with page navigation so historical requests can be accessed.

Creating a New Request

1. Click on the **Add a New Request** button at the top of the content area.
2. The entry form dialog box displays:



3. Enter a **short** description in the **Request for access to:** field.
4. If you are creating the request on another's behalf, change the **Grant access to user** box to the name of the individual to be granted access.
5. Enter the amount of time the access needs to be granted. (i.e. 6 months, 1 year, permanent, etc.)
6. Enter a complete description or further details on what and why the access is desired in the **Purpose / Description** field.
7. Press the **Commit** button to submit the request.
8. An email will be sent to the following:
   - SSP-System Administrators distribution list.
   - SSP-Security Administrators distribution list.
   - The direct manager of the **Grant access to user** selected in the form.
   - The client entering the UAR.

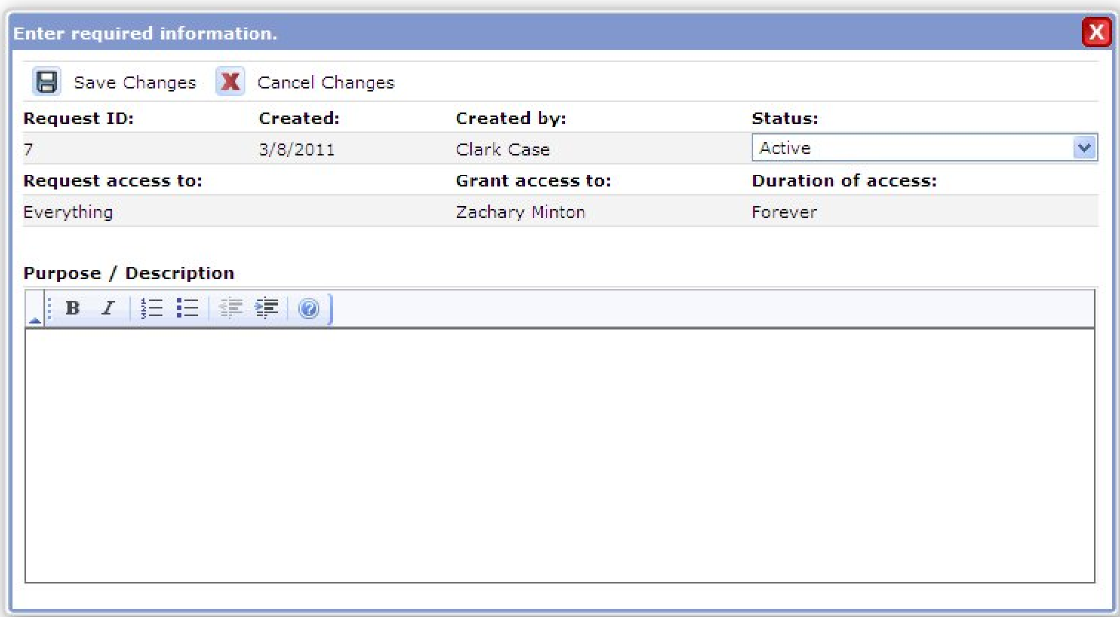
Declining, Adding Notes, Changing a UAR's Status

The tool was built with the least number of restrictions possible to allow for flexibility. If a request is Approved, Denied, or Completed, you only need to do the following:

1. Select the UAR you are working with from the UAR homepage.
2. The UAR detail page appears in a dialog:

All details for the UAR can be seen in this single dialog. Notes are saved and displayed with the most recent comments at the top.

3. Click on the **Add Notes** button to enter the edit mode.
4. The **Purpose / Description** field is replaced with a text entry field. The **Status** field is replaced with a selection box. If you are the **Created By** user or you are the **Grant access to** user the **Status** field will remain static and cannot be edited by these users.



5. When you are done entering your notes and/or changing the Status, press the **Save Changes** button to commit the change.

6. The dialog closes and you will receive an email with the latest notes as well as the full thread for this UAR.

UAR Email Overview

The UAR emails will be sent to the aforementioned recipients at all stages. The emails will contain the full thread of notes within the body of the email message. Replying to the email will NOT post to the tool. All email responses that need to be tracked and retained by the UAR tool MUST go through the UAR tool by adding a new note as mentioned in the previous section.

For convenience, there is a hyperlink to the UAR tool's homepage that will filter and only display the record for the UAR the email is referring to. Clicking on the **View** button will open the record in the dialog box.