Open sidebar

Access Leveling Procedure

User

Prepare procedural document for the below

Objective

Every individual TM's has access to various applications, The objective is to level set the access to all the Tm's across location. This procedure guides us to pull the report from Access certification tool, validate the access and remove/modify the additional access.

Data Collation

Below procedure guides us to pull the report individually across locations Collation of data in single sheet

Classification of the data as per business requirement, below are the classifications:

1. General Access

2. Share Drive access 3. Share point

4. Application Access 5. Wells Fargo Admin/System access.

ChatGPT

Procedural Document: Access Leveling Procedure

Objective:

The objective of this procedure is to ensure that all individual TM's have appropriate access to various applications. The goal is to level set the access for all TM's across locations. This document outlines the steps to pull reports from the Access Certification Tool, validate the access, and remove or modify any additional access as necessary.

Data Collation:

a. Access Certification Tool:

Access the Access Certification Tool using your login credentials.

Navigate to the report generation section.

b. Pulling Reports:

Select the appropriate location for which you want to pull the report.

Choose the relevant timeframe for the report.

Generate the report and export it to a suitable format (e.g., CSV or Excel).

c. Collation of Data:

Repeat the above steps for each location you need to include in the data collation process.

Save each report in a separate file, clearly indicating the location and timeframe.

d. Data Consolidation:

Create a new sheet or document to consolidate all the individual reports.

Copy and paste the data from each report into the consolidated sheet.

Ensure that the data is organized in a structured manner for easy classification.

Classification of Data:

a. General Access:

Review the consolidated data and identify access related to general applications.

Categorize and classify the relevant access permissions under the "General Access" category.

b. Share Drive Access:

Examine the consolidated data and identify access related to shared drives.

Categorize and classify the relevant access permissions under the "Share Drive Access" category.

c. SharePoint:

Analyze the consolidated data and identify access related to SharePoint.

Categorize and classify the relevant access permissions under the "SharePoint" category.

d. Application Access:

Evaluate the consolidated data and identify access related to specific applications.

Categorize and classify the relevant access permissions under the "Application Access" category.

e. Wells Fargo Admin/System Access:

Inspect the consolidated data and identify access related to Wells Fargo administrative or system functions.

Categorize and classify the relevant access permissions under the "Wells Fargo Admin/System Access" category.

Access Validation and Modification:

a. Review Access Permissions:

Within each category, carefully review the access permissions of each TM.

Ensure that the access is appropriate and aligned with their job roles and responsibilities.

b. Remove/Modify Access:

If any TM has additional access beyond their requirements, take the necessary steps to remove or modify it.

Follow the designated process or workflow for access removal or modification.

Update the consolidated data sheet to reflect the changes made.

Completion and Reporting:

a. Save the Finalized Data:

Save the updated consolidated data sheet with all the access modifications.

b. Generate Access Leveling Report:

Create a summary report highlighting the changes made for each TM.

Include information such as TM name, previous access, modified access, and reason for modification.

c. Distribute Access Leveling Report:

Share the access leveling report with the relevant stakeholders, including TM managers and IT administrators.

d. Retain Documentation:

Maintain a copy of the access leveling report and the updated consolidated data sheet for future reference.

Note: This procedural document provides a general framework for the access leveling process. It may need to be customized or adapted to align with the specific tools and processes used in your organization.

Send a message.

Free Research Preview. ChatGPT may produce inaccurate information about people, places, or facts. ChatGPT May 24 Version