

HFD / AFAS (CITRIX) SECURITY

3755

(No.114 January 2010)

To access HFD (Historical Financial Database) reports or AFAS (Automated Field Accounting System), designated staff must be provided with a Citrix user password. HFD's Security Officer (DAO – Fund Accounting Supervisor) in concert with the IT HELP DESK and HFD's Database Administrator (DBA) sets up the user's authority levels consistent with the user's job assignment.

FORMS / RELATED DOCUMENTS

[Request for Employee Clearance, CAL FIRE – 151](#)

[Request for Employee Clearance, CAL FIRE – 151 guide card for HFD / AFAS Users](#)

HFD SECURITY OFFICER'S RESPONSIBILITY

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The HFD Security Officer's Responsibility is:

- Before CAL FIRE – 151 is processed, ensure new user request is valid and security level is appropriate for the user.
- Process and complete the CAL FIRE – 151 requests within 72 hours of receipt.
- Maintain a current "HFDUSERS" database of all user's and passwords to HFD and AFAS. The database is password protected. The password is available in the HFD Security Officer's locked file cabinet.
- On a semi – annual basis, verify that all HFD / AFAS users meet current job assignments. If not, refer to CAL FIRE 3755.5 – Deletions.

SECURITY LEVELS

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HFD

There are 5 levels of security access to HFD. Users have the ability to review HFD canned reports for any CAL FIRE location. Each user will be assigned a security level which enables the user to access specific reports. (See CAL FIRE 3767) The 5 levels of security are as follows:

Social Security Access	Allow user to access employee pay data and employee table information extracted from CALSTARS.
General Access	Allow user to access only expenditure data extracted from

	CALSTARS
FC – 42	Allow user access to FC-42 employee data
Administrative rights	All rights for all data in HFD
Power User	Allow user to extract data from HFD and download data into another software program

AFAS

There are 7 levels of security to access AFAS. Each user will be assigned a security level which enables the user to access specific areas within AFAS. When established, a user is restricted to access by unit location. They are as follows:

Acctg	Not available at this time
Buds	Not available at this time.
Data	Access to the Messages, Clients and References tabs only
Gest	Reports only access
Mngr	This is the manager role and has full access to everything in the AFAS system
Supr	Security. Individuals with this role may create / change subordinates User id's or passwords
User, Buds, Acctg	Access to enter expenditure, budget and accounting data and print reports

REQUEST FOR EMPLOYEE CLEARANCE, CAL FIRE - 151 3755.3 (No.114 January 2010)

Access to HFD can be achieved by completing the CAL FIRE – 151 for each new user. In addition, the CAL FIRE – 151 is completed when employee has changed location or has separated from CAL FIRE. This form is completed by the employee or supervisor.

Access to HFD is not available to all CAL FIRE staff and is controlled by the HFD Security Officer.

COMPLETION OF CAL FIRE – 151 3755.4 (No.114 January 2010)

When the supervisor determines that the employees' current job assignment requires access to HFD / AFAS the supervisor should complete the CAL FIRE – 151. This form is available on the CAL FIRE intranet.

Using the "CAL FIRE – 151 GUIDE CARD FOR HFD / AFAS" users as a reference, complete the following items:

NEW USER TO HFD / AFAS

NOTE: IF NEW EMPLOYEE: COMPLETE ALL INFORMATION ON THE CAL FIRE – 151.

- Check one...: New employee
- Employee's Full Name
- Network Login I.D.: If current CAL FIRE employee enter login. If new employee leave blank
- Effective Date
- Job Title
- Unit: Location of employee, unit name, camp name, HQ location name, etc.
- Index
- Business Street Address
- Business City
- Business Zip
- Business Phone
- Fax
- Supervisor's Name and Title
- Outlook Mailing Lists...: Employee should be added to the following lists: Historical Financial Database, appropriate Finance / Personnel Mailing Lists. **IF NEW EMPLOYEE; OTHER MAILING LISTS AS APPROPRIATE**
- ADD – effective date
- HFD: Check the HFD box if Personnel staff or Finance staff
- AFAS: Check the AFAS box if Finance.
- HFD – Current Microsoft Access Version: Enter the Microsoft Access Version found on computer. NOTE: Locate Microsoft Access software program; click the "HELP" button on the menu; click the "About Microsoft Access"; Microsoft Access _____ = version.
- Describe Purpose...: Brief job description
- Select Activities...: Check the box(s) that fit job assignment

HFD

- Employee Master File = Access to CAL FIRE Employee Master File that contains Home Base Index and PCA
- Personal Services Reconciliation = job assignment includes reconciling personal services expenses.
- Operating Expense Reconciliation = job assignment includes reconciling operating expenses
- FC – 42 research (PCF) = job assignment includes access to PCF (paid-call fire fighter info. NOTE: There are no HFD reports available at this time.

AFAS

- USER = job assignment includes entering information into AFAS
- GUEST = Reports Only access in AFAS

The completed form is either faxed or emailed to the HFD Security Officer or the IT HELP DESK. **NOTE: IT IS RECOMMENDED NEW EMPLOYEE SEND CAL FIRE – 151 TO IT HELP DESK TO ESTABLISH NETWORK ID.**

CHANGE OF LOCATION TO ANOTHER UNIT OR SEPARATED EMPLOYEE

When an employee has changed locations to another unit or has left CAL FIRE complete the following items:

- Check one...: Employee Changing Job Function / Location or Employee Separating from CAL FIRE
- Employee's Full Name
- Network Login I.D.
- DELETE – effective date

The completed form is either faxed or emailed to the HFD Security Officer or the IT HELP DESK.

CHANGE OF JOB ASSIGNMENT OR CHANGE OF LOCATION WITHIN THE UNIT

When an employee who currently has access to HFD or AFAS has changed job assignment or location within the unit, advise HFD's Security Officer via email the following information:

- Employee Name
- New Job Assignment description

ESTABLISH USER PASSWORD

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When CAL FIRE – 151 is received by the HFD Security Officer or IT HELP DESK, the form must be initiated, processed and a reply sent to the user within 72 hours of receipt.

IT HELP DESK PROCESS

- When CAL FIRE – 151 is received, create ticket in “Service Desk Support Program”.
 - If new employee, follow procedures to establish new employee.
- If employee also requests HFD / AFAS access, generate ticket as an assignment to the HFD Security Officer. Also email or send fax of CAL FIRE – 151.
- When identified as HFD / AFAS user, update appropriate user group to access Citrix: “TS AFAS USERS” and / or “TS HFD USERS” and / or “TS POWER USERS”. If assignment is received from HFD Security Officer, close ticket.

HFD DBA DESK PROCESS

- When email is received from HFD Security Officer, follow procedures to establish password.
- Via email, notify HFD Security Officer of password.

HFD SECURITY OFFICER PROCESS

NEW USER

- Review CAL FIRE – 151 to determine HFD and AFAS users’ access to HFD / AFAS.
- Send email to IT HELP DESK (TS HFD, TS HFD AFAS, TS HFD POWER USER) and HFD DBA (password request).
- When notified from IT HELP DESK and HFD DBA of password, record and update user information in the following locations:
 - “HFDUSERS” database
 - Outlook Mailing Lists (Personnel and Finance)
 - AFAS (if applicable)
- Send password notification to user via email. If no email address, contact via telephone. Print the “Sent Outlook Email”. Attach “email” to CAL FIRE -151 and file.

CHANGE OF ASSIGNMENT OR LOCATION WITHIN UNIT OR CHANGE OF LOCATION TO ANOTHER UNIT OR SEPARATED EMPLOYEE)

- Changes: Determine security levels as identified in 3755.2
 - Update change information in the following locations:
 - “HFDUSERS” database
 - Outlook Mailing Lists (HFD, Personnel and Finance)
 - AFAS (if applicable)
- Deletions:
 - Record “delete” date in “HFDUSERS” database. Quarterly, send list of deletions to IT HELP DESK and HFD DBA. When confirmed, delete user from “HFDUSERS” database.
 - If AFAS user, delete from AFAS system

PASSWORD LIFE SPAN

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Once a HFD or AFAS password is assigned it is valid for an indefinite time. However, when the Network Login password is changed, the user will have to update the CITRIX Login password to the same as the Network Login password. Contact the IT HELP DESK or HFD Security Officer for assistance.

HFD USERS SECURITY REPORT

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The “HFDUSERS” database has a report listing of all HFD / AFAS users and the security level established for each user.

[\(see next section\)](#)

[\(see HB Table of Contents\)](#)

[\(see Forms or Forms Samples\)](#)