



SafetyStratus TDX User Access Request - HSRM Admin Job Aid

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TDX Initial Steps and Setup

TDX Access

To request access to TDX, so that you may resolve SafetyStratus Access Requests, use the following steps.

1. Go to <https://tdx.umn.edu/TDClient/31/Portal/Requests/ServiceDet?ID=149>
2. Click on "Request Access to TDX" in the upper right (large yellow button).
3. Fill in the form, and under "What access is needed?", select "Full Technician"
4. If you'd like TDX training, you can select yes for the training env question.
5. TeamDynamics groups: you will be asking for the "HSRM Administration" group.

6. TeamDynamix applications you require access to - "U of M Tickets"
7. Under "Approver Roles" select "Access Request Approver"

Configuring Gmail for TDX Requests - Highly Recommended

Once you have Technician access, you will be receiving A LOT of emails from TDX regarding user creations. This section will help you set up email filters so you only have to look at the relevant ones.

1. First, we will create a "Label". This will be the area where these emails will be filtered to. To start, on the left navigation of gmail, click on the "+" button next to Labels.
2. Create a name for this Label, such as "SafetyStratus User Tickets - Mine". We may want to create a few here, depending on your preferences. My suggestions:
 - a. "SafetyStratus User Tickets - Mine" - a label for tickets you need to take action on and resolve.
 - b. SafetyStratus User Tickets - Other" - all other tickets, so they won't clog up your inbox.
3. Now we will create the forwarding. To start, click on the "gear" icon in the upper right corner of the gmail page.
4. In the new menu that opens, click the top option of "See all settings". This will bring you to a new page.
5. At the top of this "settings" page, you will click "Filters and Blocked Addresses" from the top navigation.
6. Scroll to the bottom of this page and click "Create a new filter"
7. Enter the following info for the **"SafetyStratus User Tickets - Mine"** filter :
 - a. From: **tdx-prod-help@umn.edu**
 - b. Subject: Campus
 - c. Has the words: "Created By: [your name]"
 - d. Click "Create Filter"

8. See example:

From	tdx-prod-help@umn.edu		
To			
Subject	Campus		
Has the words	"Created By: Mark Melroe"		
Doesn't have			
Size	greater than		MB
Date within	1 day		
Search	All Mail		
☐ Has attachment			
			Create filter Search

9. Enter the following info for the **"SafetyStratus User Tickets - All"** filter :

- From: **tdx-prod-help@umn.edu**
- Subject: SafetyStratus
- Click "Create Filter"

10. Select the following from the "Create Filter" menu:

- Skip the Inbox (Archive it)
- Apply the Label (select the label you created from the dropdown)
- Click "Create Filter"

← When a message is an exact match for your search criteria:

☒ Skip the Inbox (Archive it)

☐ Mark as read

☐ Star it

☒ Apply the label:

Choose label...

New label...

☐ Forward it

☐ Delete it

☐ Never send it to S

☐ Send template: C

☐ Always mark it as

☐ Never mark it as

☐ Categorize as: C

☐ Also apply filter t

? Learn more

Google Tasks

Meeting Responses

SAFE-U

SafetyStratus Tickets - Mine

TeamDynamix

TeamDynamix/!TDX Major Inci...

TeamDynamix/TDX Approval R...

TeamDynamix/TDX Change Re...

TeamDynamix/TDX Feedback ...

TeamDynamix/TDX Incident

Create filter

11.

12. Repeat this step for any other labels you create. If you create a label for "SafetyStratus User Tickets - All", I'd recommend also checking the "Mark as read" option in the "Create Filter" menu.

Submitting and Configuring a User

Submitting a new User

Who can submit a request?

To gain access to SafetyStratus, a user must have a TDX ticket created requesting access. This ticket can be created in three ways:

1. By the User.
2. By an Area Manager, Lab Manager, PI, or other authority in the space they will be working in.
3. By a HSRM Staff Member.

Note: If the request is made by (2) or (3), it will automatically be approved, and bypass the "Approval" step. However, the "Configuration/Fulfillment" step is still required.

Submit a request in TDX

Here are the steps to submit a user access request using the TDX form.

1. Go to <https://tdx.umn.edu/TDClient/31/Portal/Requests/ServiceDet?ID=518>
 - a. Click on the "Request Service" button on the right of your screen.
 - b. If you are getting an error on these pages, make sure you are logged in to TDX by clicking "Sign in" on the top right corner of the page.
2. Fill in the name of the person who needs this service.
 - a. **Note:** the name will default to the person submitting the request. If you are submitting on behalf of another person, please make sure to update this.
 - b. As you start typing the name of the person, you will see options appear below. Click on the correct name/email when it shows up.
3. Fill in the other fields. The fields here represent knowledge needed by the HSRM Administrators to configure users once they are added to the system.
 - a. **Note:** If you select the "Yes, I am permitted to approve this access", it will skip the "Approval" step of the workflow. ***HSRM Staff should select this option when submitting a request on behalf of someone else!***
4. When you submit this request, the person who needs the service will also get an email from TDX. It may be a good idea to notify ahead of time!

Setting up the User in SafetyStratus

New users should start appearing in the system at 8am and 2pm daily. After a user appears, you will need to configure that user by doing the following steps.

1. Go to Data Manager > Users, and find the user that was added. Click on the "Details" icon.
2. Click on the first edit icon on the right of the screen, below their name.
3. Set the user's **system role** to "Area Manager" if they are a Location Manager, Building Coordinator, or PI. If they will be performing self inspections, add the **[INS] Self Inspector** tag under **Access Role**. Click "Save User".
4. On their user screen, scroll down to "**Group**". Click on the edit icon to the right of this area.
5. Start typing the name of the Group until it appears on the dropdown, and then click "Add to...".
6. When the group appears in the table below, use the dropdown next to the group to change their **role within the group**. Click "Save Group Assignment".
7. In the "**User Inspection Permissions**" area, click the edit icon (this takes a few moments to load).
 - a. If the user will only have visibility to certain inspection templates, assign them here. Otherwise leave as the default.
 - i. **Self-Inspectors - assign self inspection template.**
 - b. In Object Permissions, start typing the name for the correct Group(s). Click on the Group as it appears.
 - c. Click Save.
8. **IF** this user is a PI who has **Radioactive Materials** in their lab, add their Lab Roster to the Personnel Roster area as well.
 - a. If they are in a lab which uses Radioactive Materials, and may need to Order, Waste, or interact with the Permit, make sure and add them to their PI's Personnel Roster in the PI's User Profile with the role of Location Manager.

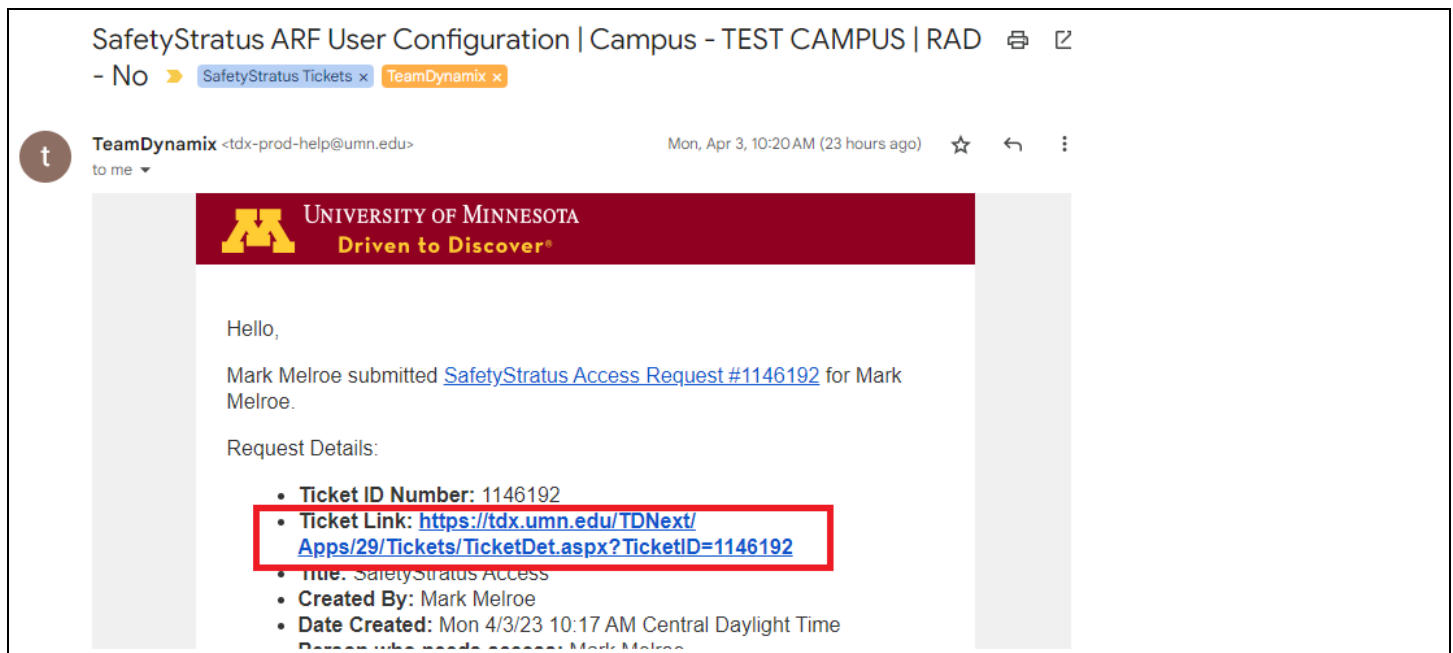
Resolving the Ticket after user Configuration

Automated Emails

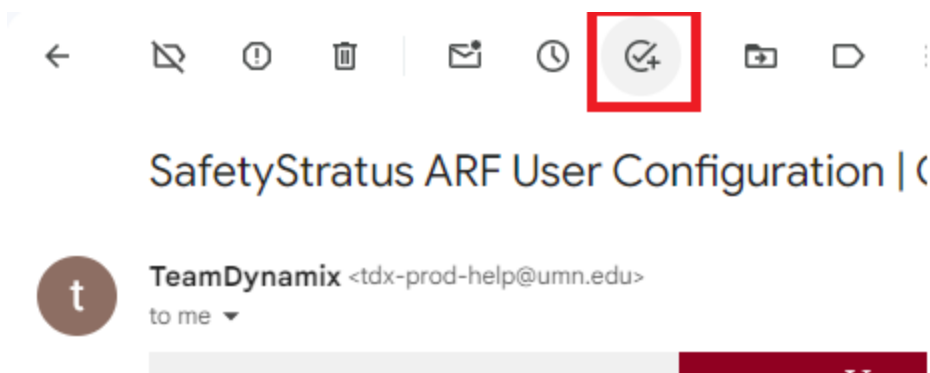
If you are set up as a TDX technician, and are in the HSRM Admin group, you will receive a series of emails when a user request is submitted. We have created two custom emails, which will have all the information you need to resolve tickets. These two emails are:

1. "SafetyStratus ARF Approval" - this will arrive if an approval step is needed for access.
2. "SafetyStratus ARF User Configuration" - once the approval happens, this email will be sent out.

Each of these emails will include a direct link to the TDX ticket. Click on the link under the bulleted item "Ticket Link:".



HELPFUL HINT: To remind you to configure the user in SafetyStratus, you can use Google's task tool! In the email, at the top menu options, there is a button to "Add to Tasks". This will then add this email as a task for your task list. For more information on task lists, reach out to Mark!



TDX Ticket

Inside the ticket, we want to concentrate on a few areas. First, the body of the ticket contains all of the information entered by the requestor. This information will be important to setting up the user

in SafetyStratus during the “Configuration/Fulfillment” step. Second, on the right, there is a box for “Current Activities”. This will indicate the current action needed by the HSRM Admin. It will be either “Access Approvals”, or “SafetyStratus Access Request Fulfillment”. There is a checkbox in the lower left corner of this box, which allows you to complete the current step.

SafetyStratus Access

In Process

Service Request ID: 1146192

0

GeneralTasks/ActivitiesPeopleT&EMy Alerts (0)Assets/CIs (0)Read By (5)

ActionsAddEditRefreshPrint View

Details

Acct/Dept
U Serv Information Services (10248)

Type
Administrative & Business / Medical & Health Systems

Service
University Services / US-SafetyStratus Access (WIP)

Priority
4 - Low

Source
Self-service

Created
Mon 4/3/23 10:17 AM by Mark Melroe

Last Modified
Mon 4/3/23 10:20 AM

Age
23 hours old

Reviewer
Unassigned

Responsibility
UHS Administration

Estimated Hours
0.00

Actual Hours
0.00

Responded
Mon 4/3/23 10:17 AM by Mark Melroe

Contact/Call-back phone number of the person who needs this service ⓘ
612-275-0025

Requestor

Mark Melroe
melro020@umn.edu
5555555555
UHS Systems Analyst
University of Minnesota
2659474
[Find Referenced](#)

Workflow

SafetyStratus Access (WIP)

Stage

 History View Progress

Current Activities (1)

SafetyStratus Access Request Fulfillment

Workflow Task
UHS Administration

Mark Complete

Update

Edit

TDX - My Open Ticket Requests

Instead of clicking on the link from your email, you can go here to see all open tickets you have created:

<https://tdx.umn.edu/TDClient/31/Portal/Requests/TicketRequests/>

From here, click on the Title of the Ticket:



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Driven to DiscoverSM

Rachael Perriello

Home
Services
Knowledge Base

Ticket Requests
My Favorites
My Recent
My Approvals
Services A-Z
Search

Ticket Requests (1)

Search
To Excel
Print

Search

ID

Status Class

New, In Process, On Hold

Acct/Dept

Start typing...

Q

X

Reviewer

Start typing...

Q

X

Service(s)

Start typing...

Q

X

Due Date

from

to

Service Offering(s)

Start typing...

Q

X

Created

from

to

☒ Include requests that I am listed as a contact on

☐ Include requests from my accounts / departments

ID	Title	Acct/Dept	Service	Service Offering	Status	Reviewer	Requestor	Modified
1506541	SafetyStratus Access	Biology (10340)	US-SafetyStratus Access		In Process		Dustin Ray	Thu 2/29/24 12:09 PM

Page
1

When the ticket opens, you'll need to click on the "To TDNext" button to get all of the options to resolve the ticket:



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Rachael Perriello

HomeServicesKnowledge Base

Ticket RequestsMy FavoritesMy RecentMy ApprovalsServices A-ZSearch

Services / Ticket Requests / SafetyStratus Access

SafetyStratus Access

Service Request ID: 1506561

Withdraw Request

Add Attachment

Add Alert

To TDNext

Details

Account/Department

D Biology (10340)

Service

University Services / US-SafetyStratus Access

Source

Self-service

Workflow

SafetyStratus Access

Workflow Stages

— Fulfillment

— Supervisor Approval

— User Approval

— Processing

✓ Access Approvals

Current Workflow Step

[SafetyStratus Information Post API](#)

Created

Thu 2/29/24 12:09 PM by Rachael Perriello

Last Modified

Thu 2/29/24 12:09 PM

In Process

Requestor

DR

Dustin Ray

rayd@umn.edu

5555555555

Attachments (0)

+

Drag and drop attachments here to upload.
A maximum of 4 MB can be uploaded at once.

Read By (2)

[Kimberly Jenkins](#)

Thu 2/29/24 12:09 PM

[Rachael Perriello](#)

Thu 2/29/24 12:09 PM

From there, you can close the ticket by clicking on “Mark Complete” in the current activities.

Service Request ID: 1146192  0

General Tasks/Activities People T&E My Alerts (0) Assets/Cls (0) Read By (5)

[Actions](#) [Add](#) [Edit](#) [Refresh](#) [Print View](#)

Details

Acct/Dept

U Serv Information Services (10248)

Type

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Service

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UHS Administration

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Actual Hours

0.00

Responded

Mon 4/3/23 10:17 AM by Mark Melroe

Contact/Call-back phone number of the person who needs this service 

612-275-0025

Requestor



Mark Melroe

melro020@umn.edu

5555555555

UHS Systems Analyst

University of Minnesota

2659474

[Find Referenced](#)

Workflow

SafetyStratus Access (WIP)

Stage

☐ ☒ ☐ ☐ ☐

[History](#)

[View Progress](#)

Current Activities (1)

SafetyStratus Access Request Fulfillment ☐

Workflow Task

UHS Administration

☒ Mark Complete

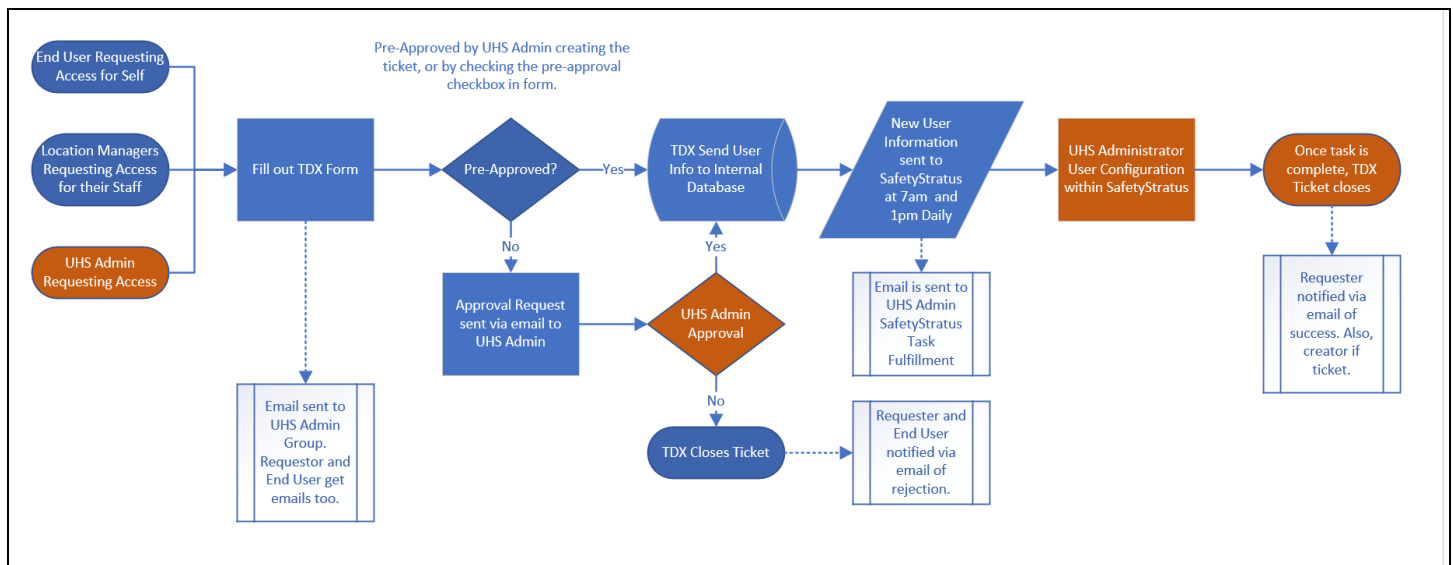
[Update](#)

[Edit](#)

Additional Resources

Access Request Workflow

Workflow Diagram



HSRM Admin Steps

- When a request comes in, the first step is "Approval". This is granted in three ways:
 - If the ticket is created by someone in the "HSRM Admin" TDX group, the request is automatically approved.
 - If the checkbox for approval is checked within the ticket, the request is automatically approved.
 - If neither of those is true, the first step on the ticket will be "approval", and will need someone from the "HSRM Admin" TDX group to go into TDX and complete the approval step.
- After the request has been approved, TDX will send the user's information to an internal database of users. From there, **we send new users to SafetyStratus at 8am and 2pm every day**. It may take up to two hours from these times for the users to appear in SafetyStratus.
 - Additionally, once a request has been approved, the TDX Ticket will go to the "Configuration/Fulfillment" step.
- After the user has successfully been added to SafetyStratus via our integration (happens twice daily, see above), we can perform the configuration/fulfillment step. Configuration/Fulfillment is prompting the HSRM Admin to configure the user in SafetyStratus. This involves assigning them to the correct group/room, giving them correct permissions, making sure their system role is correct, and filling in other information as needed.
- After the configuration is complete in SafetyStratus, a HSRM Admin will go into the TDX ticket and mark that step as complete. This will then close the ticket.

Navigating TDX

You can access TDX directly by going to <https://tdx.umn.edu/>.

From here, click on "Users".

When you enter, a popup will appear with items awaiting your approval. You can click on this to be taken directly to your tickets. Or you can click on the "x" to close this screen.

In the upper-left corner of your screen will be a blue box with 9 small squares. Click on that to open a menu. On this menu, click on "My Work". The "My Work" area will show you all tickets that are assigned to you and your group. You can see on the left navigation an area for approvals, assignment, and work. You can see new tickets that need to be addressed by the numbers next to these categories.