Fermilab

Managed by Fermi Research Alliance, LLC for the U.S. Department of Energy Office of Science

Site Access and Badging

Contingent Coordinator Training

October 29, 2020

Agenda

- Introduction
- Roles
- Overall process
- Contingent Coordinator Task
- Questions

Site access and badging roles

Role	Description
User	Individual who accesses Fermilab facilities and resources for the purpose of advancing the scientific mission of the Laboratory and whose work generally requires unescorted and/or after-hours access to non-public access areas (DOE-Approved User Facility and/or non-User Facility resources). Users require safety training to perform work, and a Fermilab ID badge and/or access to Fermilab networks or systems. Users can receive payments or reimbursements from Fermilab, which include individuals participating in reviews or committee meetings.
Sub-Contractor	Individual who accesses Fermilab facilities and resources working via a Procurement-managed subcontract with FRA. Subcontractors require subcontractor training to perform work, and a Fermilab ID badge. Subcontractors include individuals who consults on behalf of the Laboratory.
Authorized Guest	Individual who does not have business with the laboratory but is approved to access select Fermilab facilities, such as the Fermilab Children's Center, Fermilab Village Housing, or Recreation Center.
Fermilab Point of Contact (POC)	FRA employee, user or sub-contractor responsible for confirming an individual's affiliation with Fermilab and home institution.

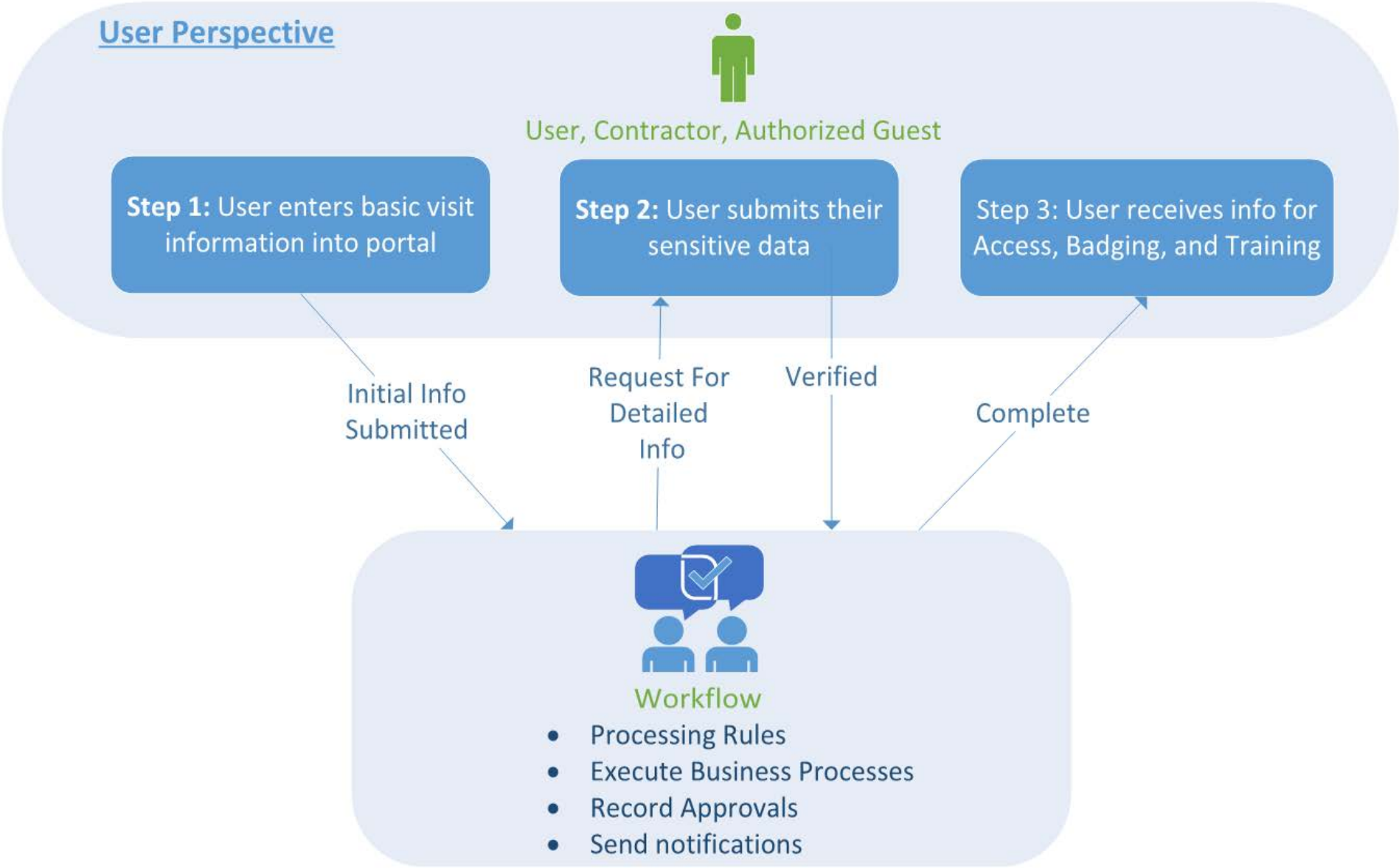
Site access and badging roles continued

Role	Description
Users Office	FRA team responsible for onboarding Users.
Badging Office	FRA team responsible for onboarding Sub-Contractors, Authorized Guests, and providing badges to all workforce.
Foreign Visit Assignment (FVA)	FRA team reviewing access request for non-US citizens.
Export Control (EC)	FRA team reviewing export controls for non-US citizens.
Agreements Manager	FRA team ensuring an agreement is in place for a home institution.
Institution Manager	FRA team managing details of Home Institution list.
Contingent Coordinator	FRA employee in lab organization responsible for validating sub-contractor information is accurate. Handles exceptions for contingent workers in ServiceNow (SNOW).
Affiliation Approver/Computing Validator	FRA-approved individual (e.g., Spokesperson, Division/Section Head, etc.) who is accountable for verifying the identity and information of an individual requesting access (physical and/or remote) prior to approving Fermilab access. Approvers are required to develop and follow their experiment, project, or division/section approver verification process.
Contract Approver	FRA employee in lab organization responsible for approving the Sub-Contractor.
Security Communication Center	Fermilab team responsible for providing access to buildings and locations.

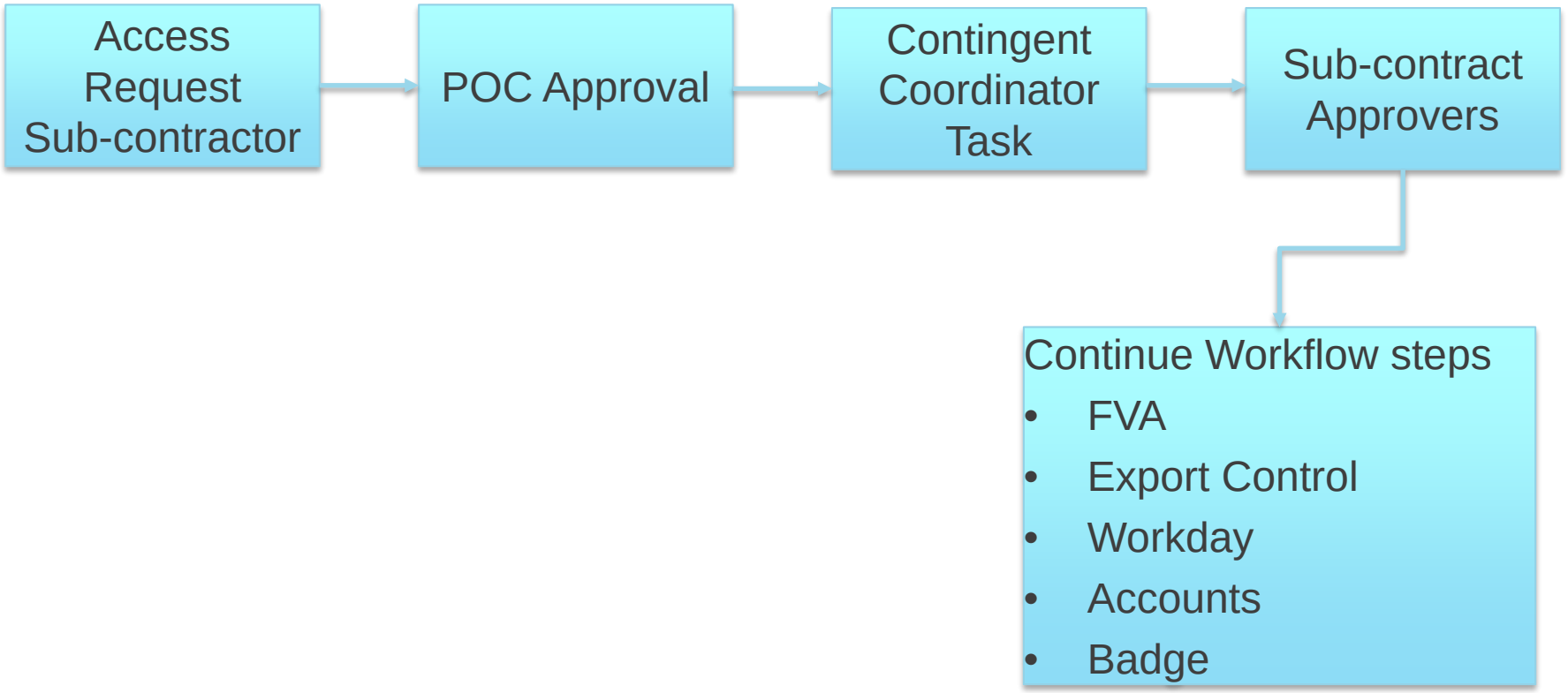
Terminology

- Access Request – form required for a person that is not an employee to gain access to Fermilab resources
- Affiliation – Fermilab organization, experiment, collaboration, or project that accepts contingent workers.
- No PO Affiliation – This is an external lab association added to the affiliations database that has been created specifically for those sub-contractors that don’t necessarily have a purchase order. Examples are Fermilab Natural Areas, AbriCU, and others
- Sub-Contractor Supervisory organization – FermiWorks supervisory organization structure for sub-contractors

Overall Process

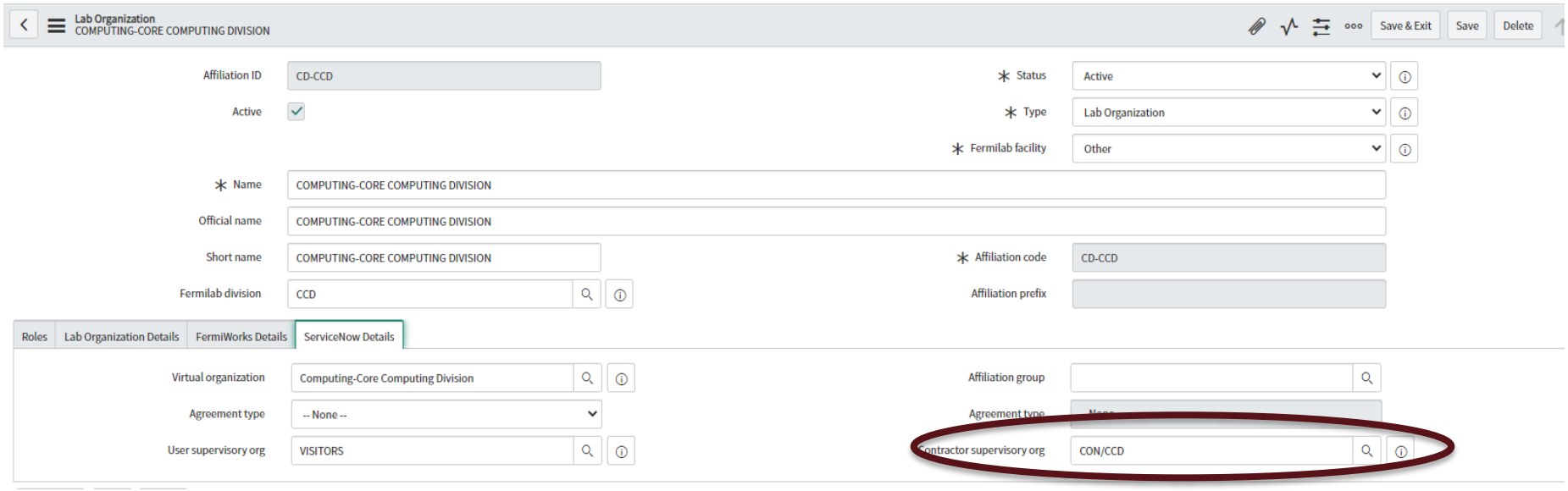


Sub-contractor Process Workflow



Important Data

- FermiWorks sub-contractor supervisory organization
  - Role of Contingent Coordinator is managed in FermiWorks by Global Services
- Lab Organization Affiliation
  - Contract approvers
  - Sub-contractor supervisory organization needs to be populated in the affiliation with the value to auto-assign the request to Contingent Coordinator



Demo – Use Cases

- Sub-contractor – US Citizen – Onsite – No accounts
- Sub-contractor – Non US Citizen – Onsite – w/Accounts
- Sub-contractor – Non US Citizen – Offsite –w/Accounts
- Sub-contractor – US Citizen - No PO

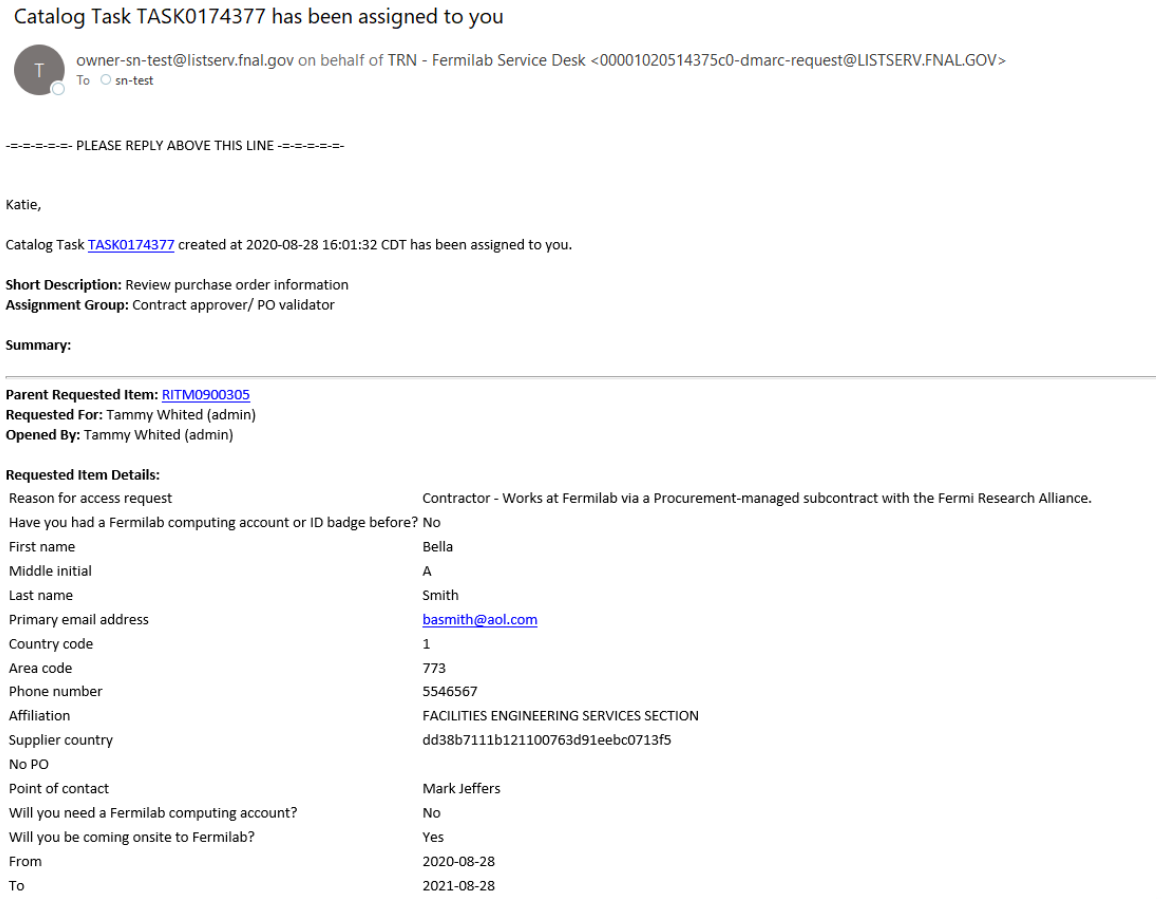
- TRN URL to Access Request form: (To TEST)
- https://fermitrn.servicenowservices.com/expert_shell.do?sysparm_sys_id=63f9f6a8dbd148104e65ff621f961975
- ServiceNow TRN link https://fermitrn.servicenowservices.com/

Contingent Coordinator Task Email

- The system will auto-assign the Task to a Contingent Coordinator based on which organization was selected on the access request
- An email will be sent to Contingent Coordinators based on affiliation

1. Click the Task number link in the email
2. ServiceNow Classic View
   a) Home Page – My Work Page
      a) Tasks assigned to me

      OR
   b) Left navigation menu go to Request – Catalog Task – Assigned to me



Catalog Task TASK0174377 has been assigned to you

owner-sn-test@listserv.fnal.gov on behalf of TRN - Fermilab Service Desk <00001020514375c0-dmarc-request@LISTSERV.FNAL.GOV>
To sn-test

-=-=-=-=-=- PLEASE REPLY ABOVE THIS LINE -=-=-=-=-=-

Katie,

Catalog Task TASK0174377 created at 2020-08-28 16:01:32 CDT has been assigned to you.

Short Description: Review purchase order information
Assignment Group: Contract approver/ PO validator

Summary:

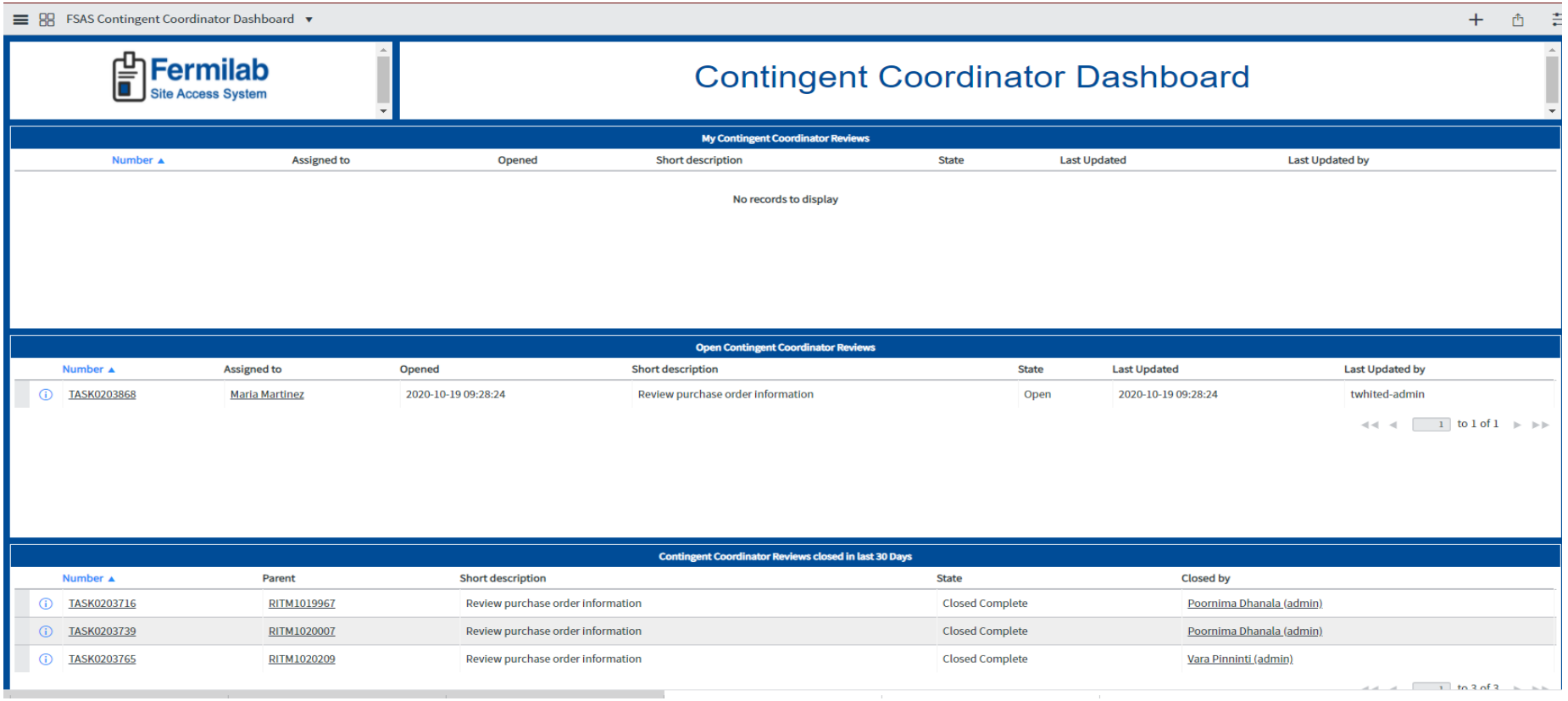
Parent Requested Item: RITM0900305
Requested For: Tammy Whited (admin)
Opened By: Tammy Whited (admin)

Requested Item Details:

Reason for access request	Contractor - Works at Fermilab via a Procurement-managed subcontract with the Fermi Research Alliance.
Have you had a Fermilab computing account or ID badge before?	No
First name	Bella
Middle initial	A
Last name	Smith
Primary email address	basmith@aol.com
Country code	1
Area code	773
Phone number	5546567
Affiliation	FACILITIES ENGINEERING SERVICES SECTION
Supplier country	dd38b7111b121100763d91eebc0713f5
No PO	
Point of contact	Mark Jeffers
Will you need a Fermilab computing account?	No
Will you be coming onsite to Fermilab?	Yes
From	2020-08-28
To	2021-08-28

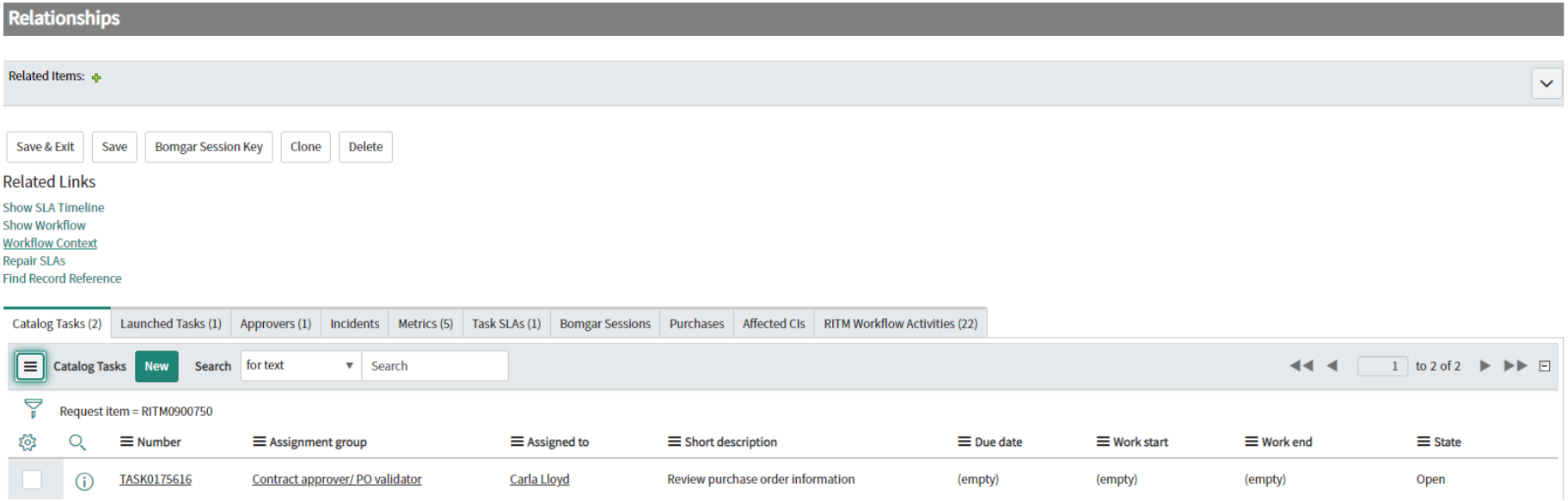
My Work Page – Contingent Coordinator Dashboard

- Classic view of ServiceNow - type Dashboards in the left navigation search. Click on Dashboards menu item, then click on the Contingent Coordinator Dashboard



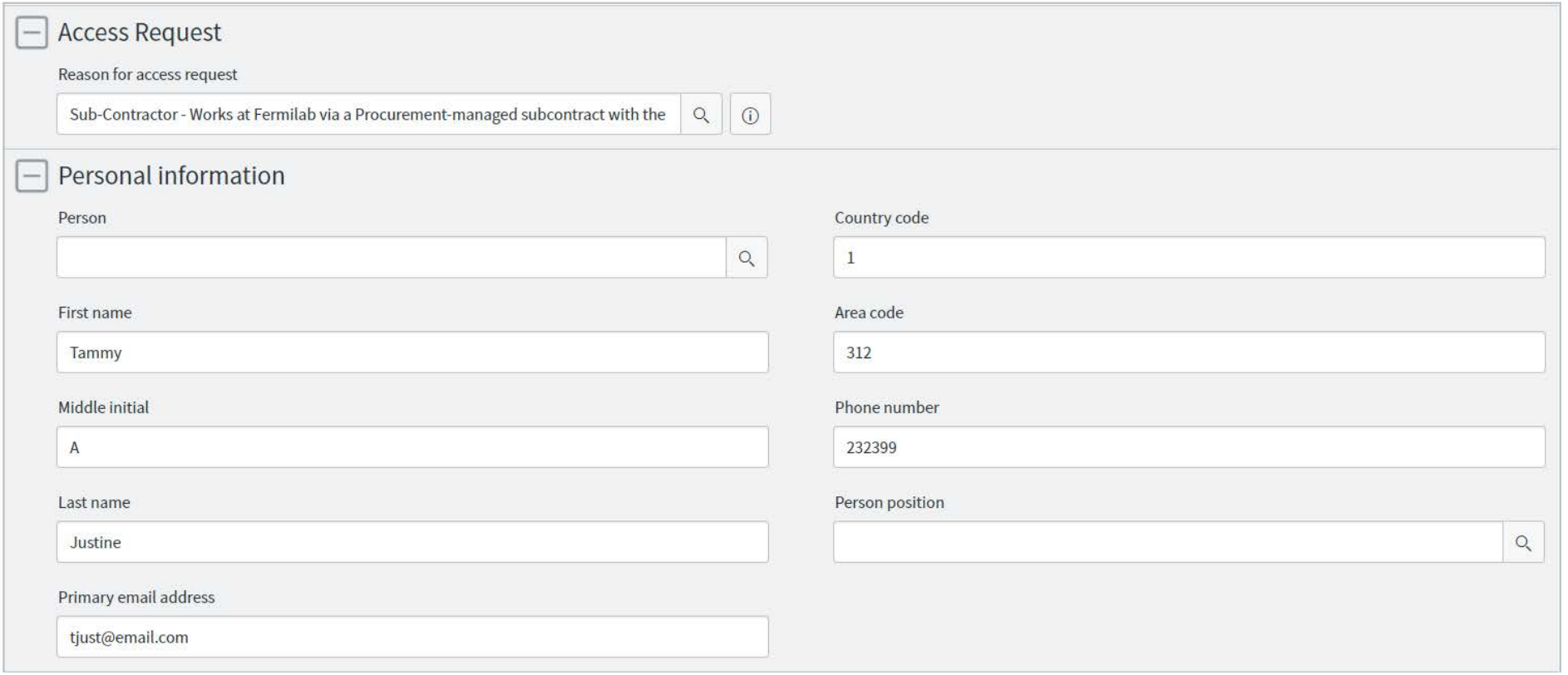
Contingent Coordinator task in ServiceNow

If you want to access the Task from the RITM, you can find it under the Catalog Task tab near the end of the RITM



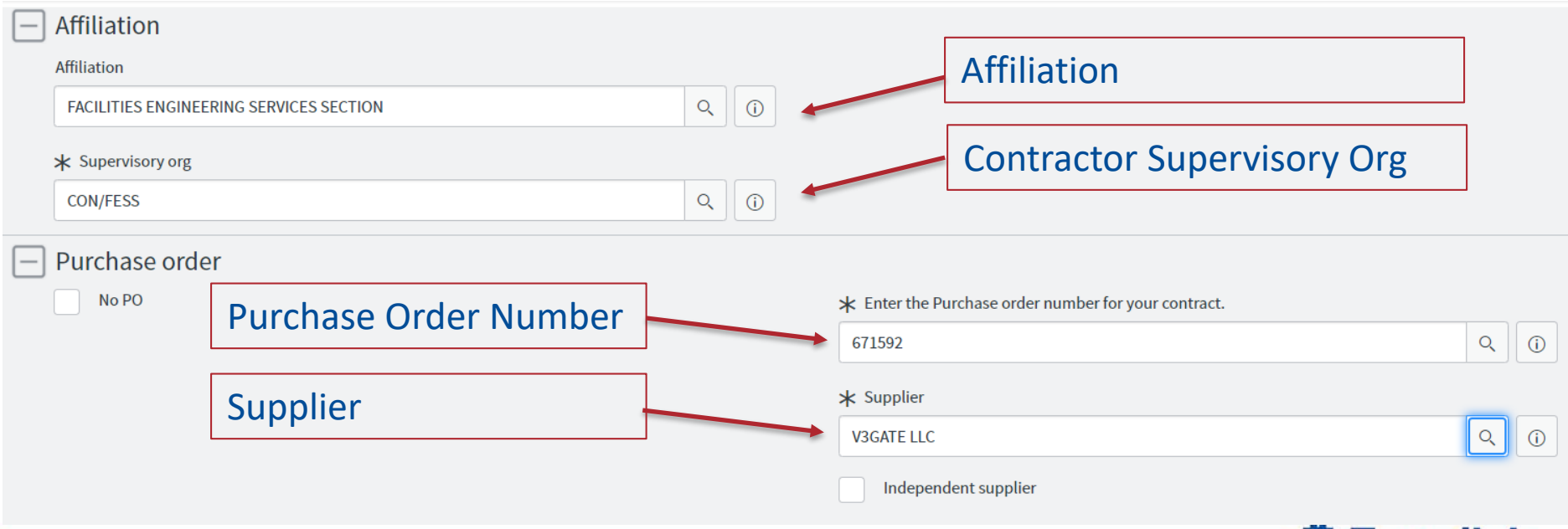
Contingent Coordinator Task detail in ServiceNow

- Open the Task
- Go to the Variables section
- Review the person information



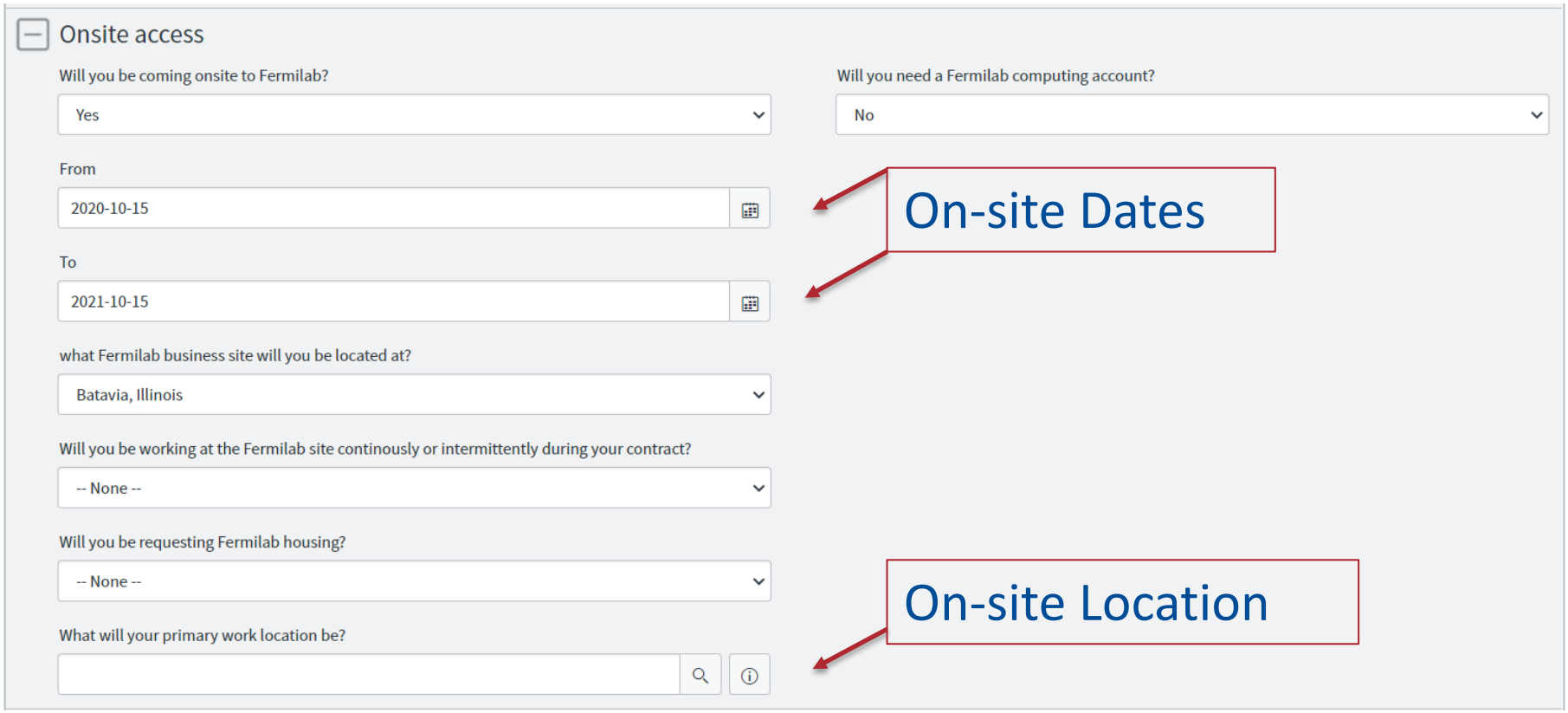
Contingent Coordinator Task detail in ServiceNow

- Go to the Affiliation and Purchase Order section
- Update Affiliation
- If needed update Supervisory org to be the sub-contractor org you want this person in FermiWorks
- Verify Purchase Order information
  - To update, type new PO or search with magnifying glass
  - Click ‘i’ to view details of the PO
  - Click ‘i’ to review the country selected for the supplier



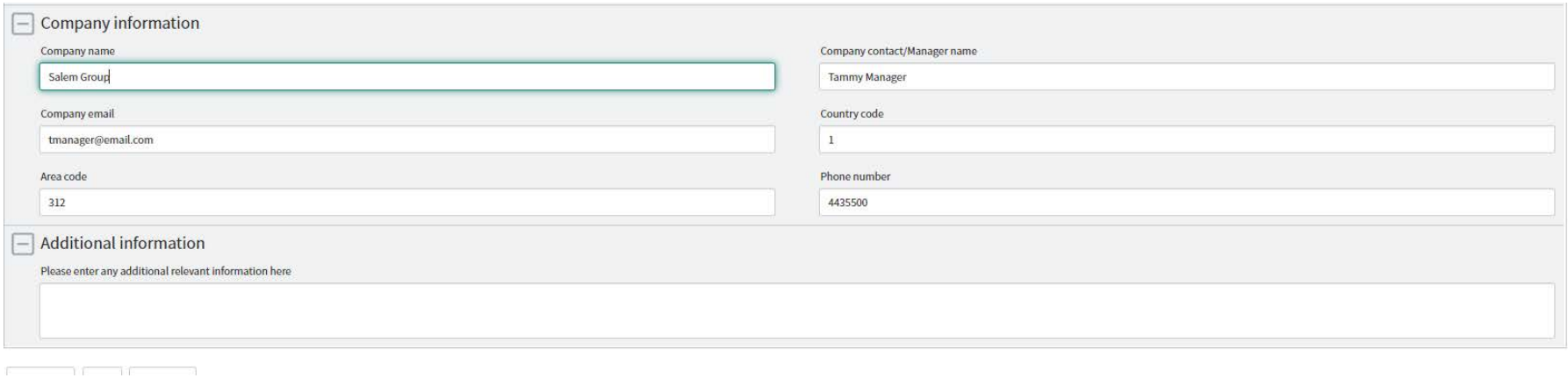
Contingent Coordinator Task detail in ServiceNow

- Review onsite access information and make sure end date does not exceed contract dates



Contingent Coordinator task detail in ServiceNow

Review company information and update if needed

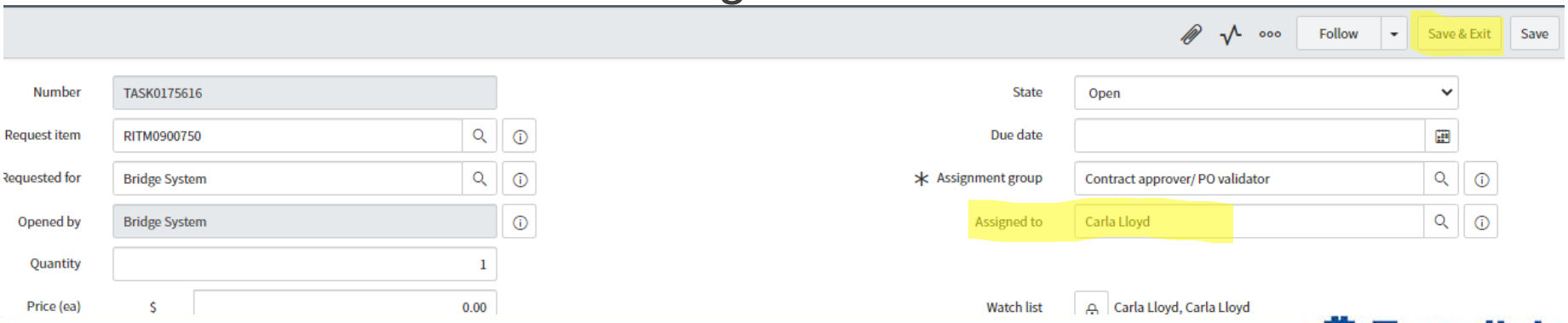


Once review is complete, Click ‘Close Task’ button at top

Reassign task to a different Contingent Coordinator

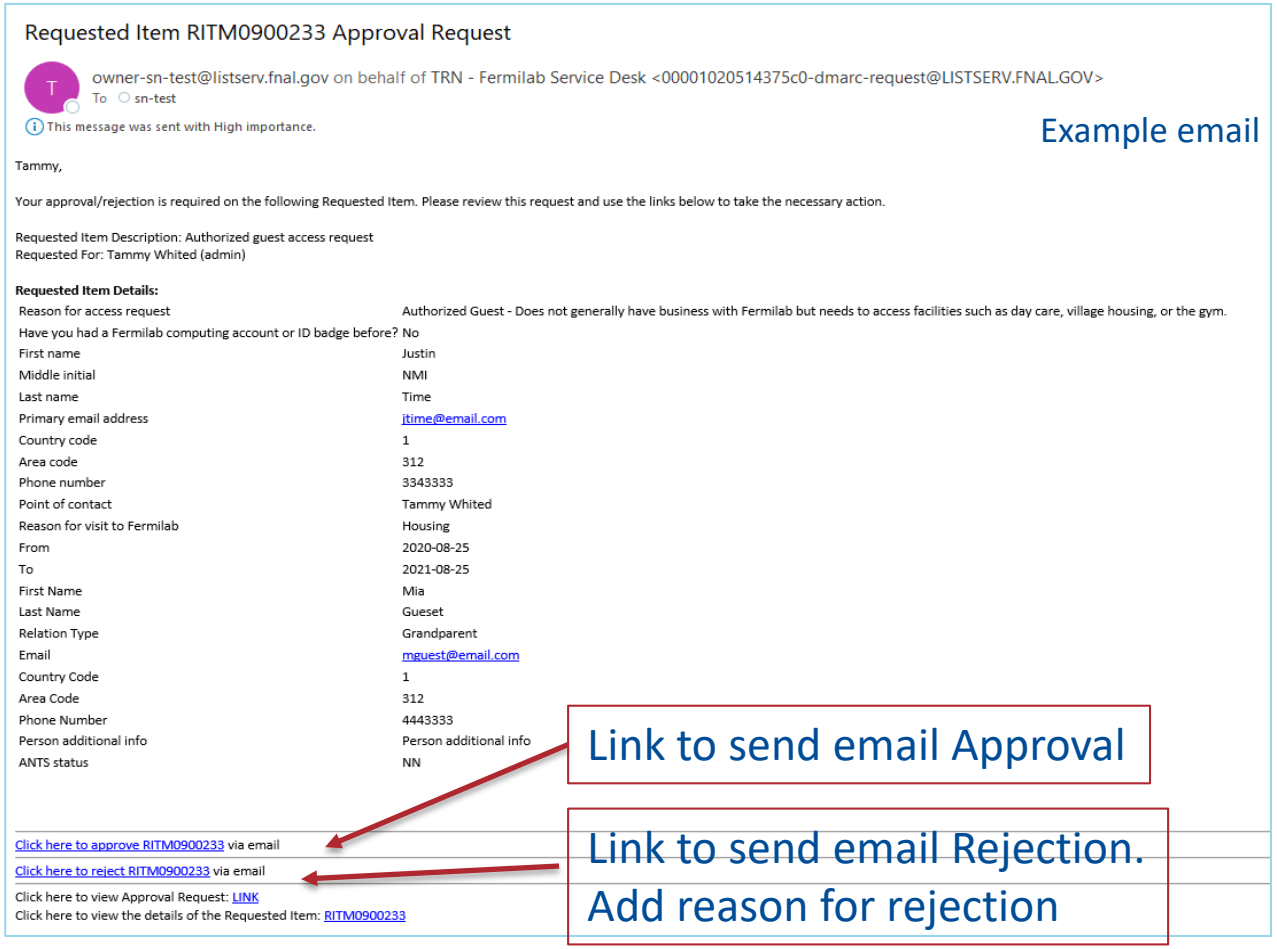
If for any reason (vacation, work schedule, etc.) you need to reassign the task to a different contingent coordinator

- Open the Task
- Click on the “Assigned to” field where it has your name
- Type in the contingent coordinator’s name you would like the Task reassigned to
- Click the Save & Exit button in the top right corner
- The other contingent coordinator will receive a notification that the Task has been assigned to them



Sub-Contract Approvers are next in the process

- Sub-Contract approvers have been identified for each lab organization in the affiliation database. Their approval grants the sub-contractor access to Fermilab resources.



Requested Item RITM0900233 Approval Request

owner-sn-test@listserv.fnal.gov on behalf of TRN - Fermilab Service Desk <00001020514375c0-dmarc-request@LISTSERV.FNAL.GOV>
To sn-test

This message was sent with High importance.

Example email

Tammy,

Your approval/rejection is required on the following Requested Item. Please review this request and use the links below to take the necessary action.

Requested Item Description: Authorized guest access request
Requested For: Tammy Whited (admin)

Requested Item Details:

Reason for access request	Authorized Guest - Does not generally have business with Fermilab but needs to access facilities such as day care, village housing, or the gym.
Have you had a Fermilab computing account or ID badge before?	No
First name	Justin
Middle initial	NMI
Last name	Time
Primary email address	jtime@email.com
Country code	1
Area code	312
Phone number	3343333
Point of contact	Tammy Whited
Reason for visit to Fermilab	Housing
From	2020-08-25
To	2021-08-25
First Name	Mia
Last Name	Gueset
Relation Type	Grandparent
Email	mguest@email.com
Country Code	1
Area Code	312
Phone Number	4443333
Person additional info	Person additional info
ANTS status	NN

Click here to approve RITM0900233 via email

Click here to reject RITM0900233 via email

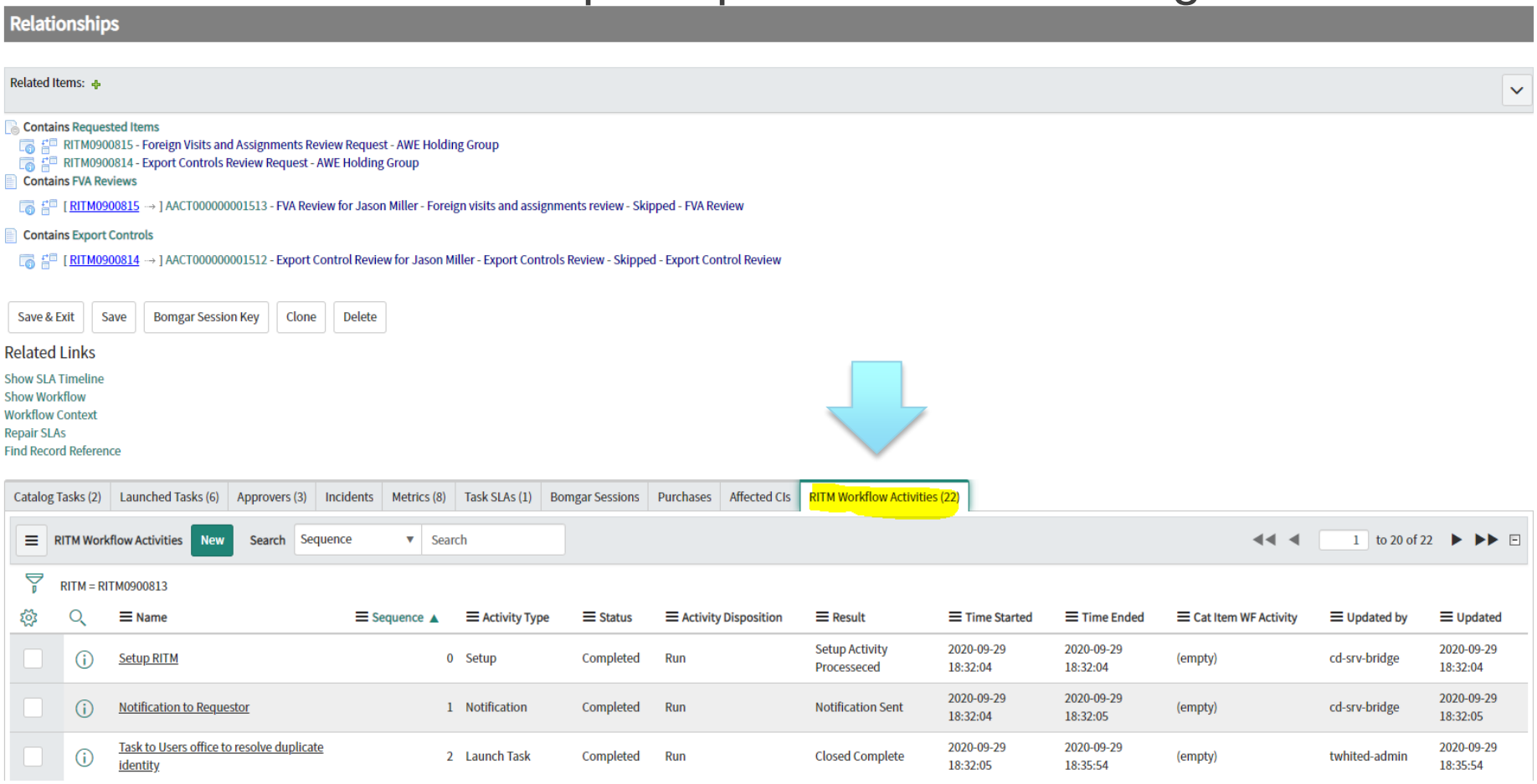
Click here to view Approval Request: LINK
Click here to view the details of the Requested Item: RITM0900233

Link to send email Approval

Link to send email Rejection.
Add reason for rejection

How to find where the Access Request is in the process

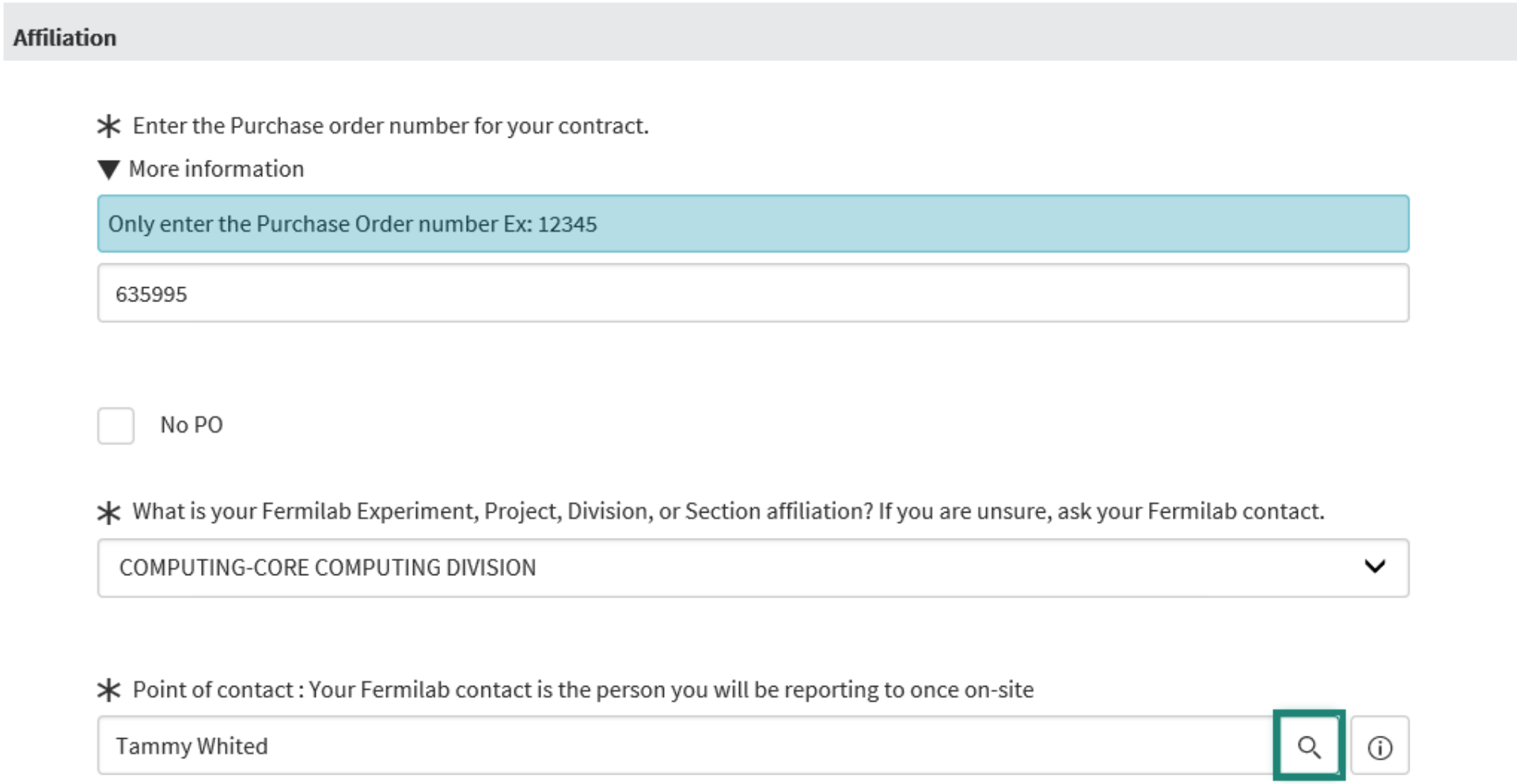
In tabbed section of the Request Item – Go to RITM Workflow Activities to see what step the process is executing



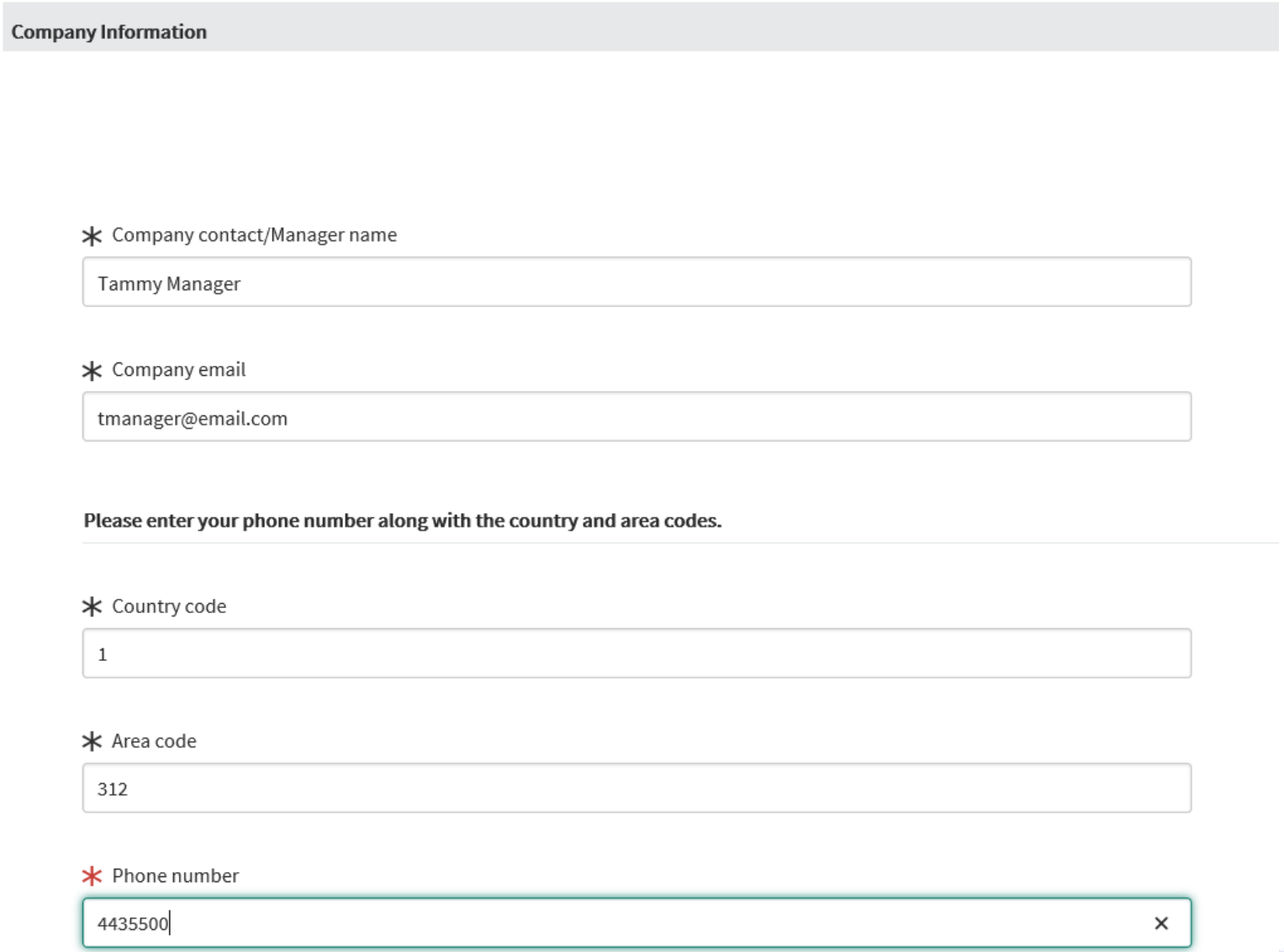
Sub-contractor form guidance

Fields	Definitions/additional information
Sub-contractor's full name and email address	The email should be the sub-contractor's individual email so they can directly receive instructions for next steps.
Sub-contractor's phone number	The phone number must have a valid country and area code. Country code for United States is '1'
Sub-contractor's country of citizenship and birth	List all citizenships. If not a U.S. citizen, select Legal Permanent Resident status
Point of contact name	Must be an active Fermilab badge-holder
Fermilab division or section affiliation	**POC may need to provide**
PO number	**POC may need to provide**
Reason for visit	Description of work to be performed
Select if the sub-contractor will need computing access	If yes, access dates cannot exceed one year
Select if the sub-contractor will be onsite at Fermilab	If yes, access dates cannot exceed one year
If coming onsite, select primary work location	Fermilab building and floor **POC may need to provide**
Company contact/manager name, company email, and company phone number	The phone number must have a valid country and area code. Country code for United States is '1'
Emergency contact name, relationship, email, and phone number	This is a personal contact that Fermilab will contact in case of emergency (e.g. the sub-contractor's spouse, family member, or friend)

Sub-contractor Access Request - Purchase Order section



Sub-contractor Access Request - Company Information



Questions and Answers from Training Session

Q: What if there are technical capability issues with contracted employees? Meaning they don't have email or computer to complete the Access Request Form or Workday portion.

A: The sub-contractor company needs to assist their staff in completing the forms and help provide an email.

Q: Site Services is currently filling out the Access Request Form. Should we continue to do this or is up to the vendor to help their employees?

A: It is up to the vendor to help their staff; however, you can offer to assist as they fill out the form.

Q: What if the contingent coordinator is on vacation? Can you reassign your tasks to another contingent coordinator?

A: Yes, if the backup is identified as a Contingent Coordinator in FermiWorks for that sub-contractor supervisory organization, then in ServiceNow you either re-assign the task to the backup or they will be on the watch list of the task and can view the task in my watched tasks.

Questions and Answers from Training Session

Q: If there is more than one Contingent Coordinator for organization and all receive the notification, is there still need to delegate to them?

A: Not necessarily, that will depend on your division/section process.

Q: Does this list check if a PO is going to expire?

A: We only check that the PO is active. You should provide the sub-contractor with dates they can enter based on the PO.

Q: Who owns the process after the contingent coordinator approves? Meaning what is the next step in the process?

A: Contract Approvers

Q: Do contingent coordinators get an email if there is a pending task? Also, if there's more than one Contingent Coordinator for an organization, in what order are tasks assigned to coordinators?

A: Yes, you will get an email. If there is more than one person, the task gets assigned to the first on the list and the rest of the people are added to the watchlist and are copied on the email.

Q: Is this is replacing guest/visitor process?

A: Yes.

Questions and Answers from Training Session

Q: What if the contingent coordinator is out of the office?
A: You can reassign your tasks to another contingent coordinator, or a contingent coordinator in your group can look at and work your tasks while you're gone. You should designate a backup to cover for you if you are not available.

Q: Does this system integrate with the essential personnel list to allow people onsite?
A: No. Anyone coming onsite should follow the current process to request access. This process does not add them to the list.

Q: Do contingent coordinators get an email if there is a pending task?

A: Yes, you will get an email and a weekly reminder if you have a pending task.

Q: Is the PO list on the access request form updated in real time?
A: Yes, it is updated from EBS so it should be accurate and up to date.

Q: How can a contingent coordinator check a PO?
A: You can go to the PO Lookup or Web Query on finance site to look at requisitions and PO numbers

Q: How far in advance should we have the contractor complete this form?
At least a few days but it could take up to 4 weeks to process a non-US citizen. There needs to be time for the request to get through the different approvers and time for the contractor to add their information into FermiWorks.

Helpful Links

- Access Changes information about Nov. 3 rollout –
  - https://get-connected.fnal.gov/accesschanges/
- https://fermi.servicenowservices.com/
- Access Request Form Reference Guide
- Site Access and Badging FAQ
- Sub-Contractor & Authorized Guest Access Page
- User Access Page
- Housing Office Page