Enterprise Privacy Policy Engine (EPPE)

Contractor Approval Workflow Training Module - Update DUA Custodian(s)/DESY User(s)

Training Topics

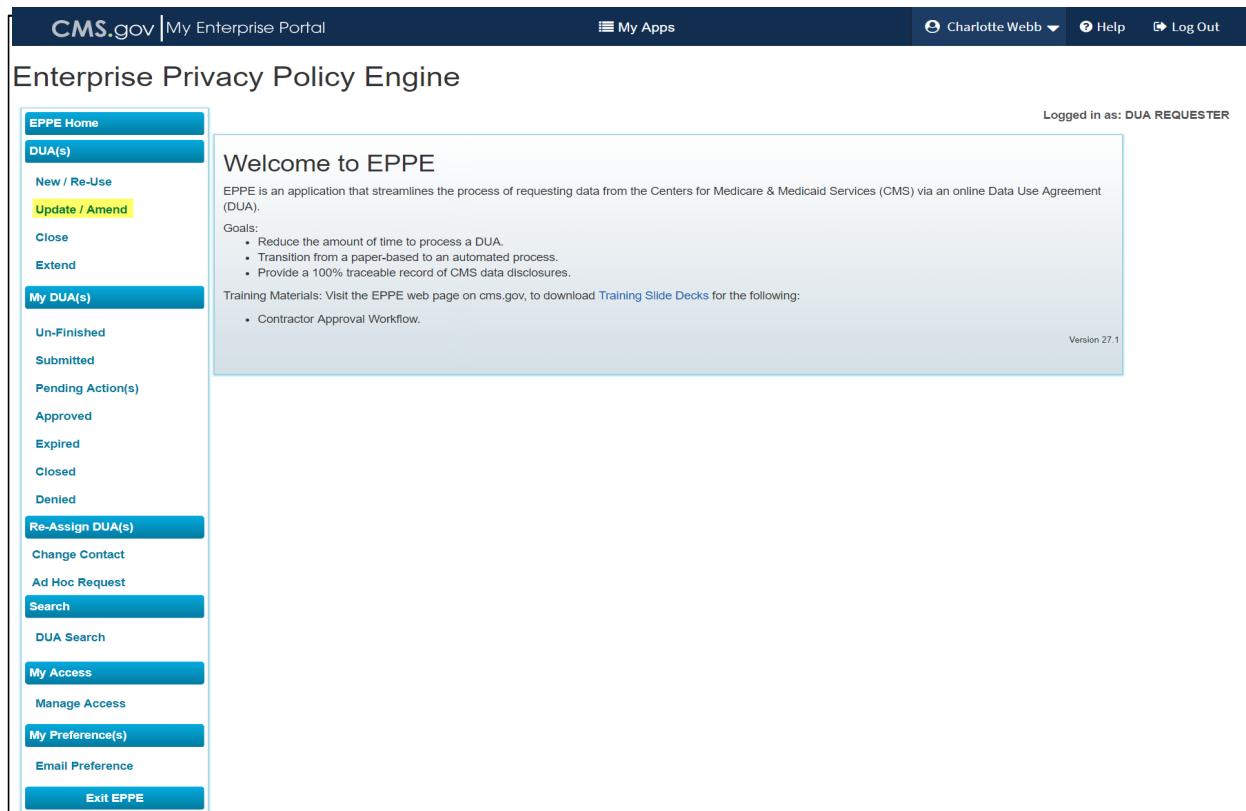**Training Topics in this Module**

- Update/Amend DUA
    - Custodian(s)/DESY User(s)

UPDATE/AMEND A DUA

DUA Requester – Update/Amend

EPPE Menu

Select the **Update / Amend** option on the DUA(s) menu to display a list of Approved DUAs that can be updated.

DUA Requester – Update/Amend

List of DUAs Eligible to Update

DUA

UPDATE DUA

PLEASE SELECT ONE OF THE DUA TO UPDATE

Search: _____

DUA Number ▲	Organization ▲	Requester ▲	Request Date ▲	Status ▲	
CONT-2018-53372	NORTH CAROLINA STATE UNIVERSITY	Taraji Henson	1-5-2018	Approved	View
CONT-2018-54153	NORTH CAROLINA STATE UNIVERSITY	Taraji Henson	2-21-2018	Approved	View

Showing 1 to 2 of 2 entries   Previous Next

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1. A list of Approved DUAs displays.
2. Select the **View** link or **Search** for the DUA to update.

Note: If there are multiple pages of Approved DUAs, the **Previous** and **Next** buttons become enabled for scrolling through the listing.

DUA Requester – Update/Amend

DUA Displays

1. The **My DUA** screen displays.
2. Select the **Update** button.

DUA Requester – Update/Amend

DUA Review Screen Displays

1. The **Update DUA Request** Review screen displays on this slide with the following editable sections:
   - **Main Information**
   - **Subcontractor Organization(s)**
   - **Custodian/DESY Users**
   - **Existing Data File Descriptions**
   - **Re-use Data File Descriptions**
   - **New Data File Descriptions**
   - **Documents**
   - **Comments**

2. The second half is displayed on the next slide.

DUA Requester – Update/Amend
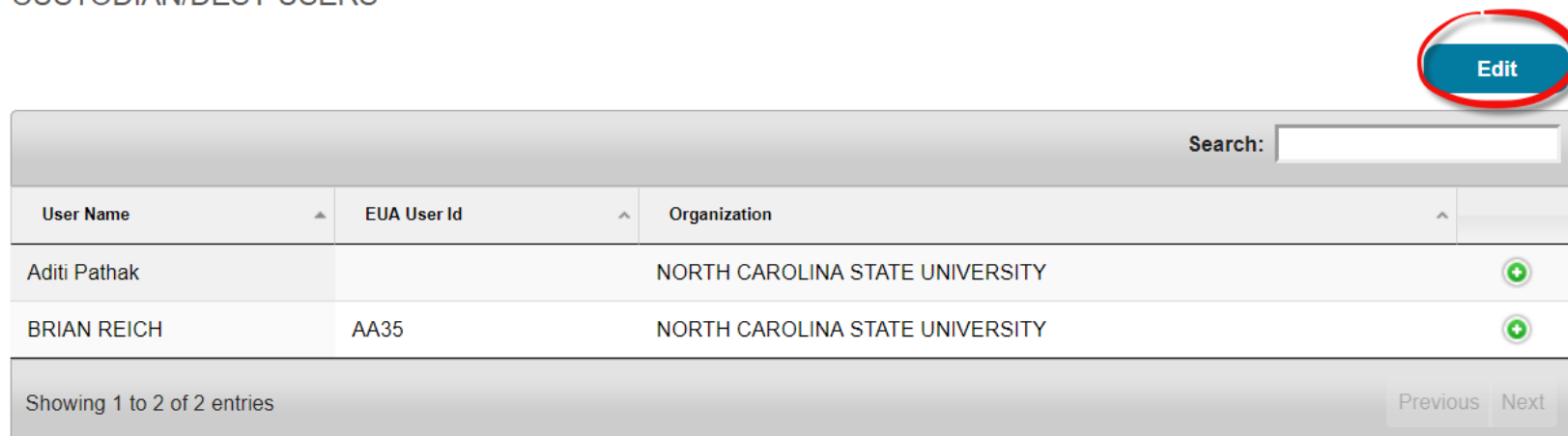
DUA Review Screen Displays

The second half of the **Update DUA Request** Review screen is displayed here with the following editable sections:

- **Existing Data File Descriptions**
- **Re-use Data File Descriptions**
- **New Data File Descriptions**
- **Documents**
- **Comments**

DUA Requester – Update/Amend

Edit DUA: Custodian/DESY Users

CUSTODIAN/DESY USERS

Edit

Search: [   ]

User Name	EUA User Id	Organization	
Aditi Pathak		NORTH CAROLINA STATE UNIVERSITY	⊕
BRIAN REICH	AA35	NORTH CAROLINA STATE UNIVERSITY	⊕

Showing 1 to 2 of 2 entries   Previous Next

Select the **Edit** button associated with the **Custodian/DESY Users** section to make changes if applicable.

DUA Requester – Update/Amend

DESY USER Screen: The DESY User

1. The **Custodian(s)/DESY User** screen displays.
2. Select the **Add Custodian(s)/DESY User** button if **Custodians** need to be added as **DESY Users** to access data from the **DESY System**.

Notes:
- If you remove a **DESY User** from the DUA, this removes them as a **Custodian** on the DUA.
- It is optional to add **DESY Users** but you must have at least one (1) Custodian on the DUA.

DUA Requester – Update/Amend

DESY USER Screen: Add a DESY User

1. **Add Custodian/DESY User** pop-up displays.
2. Enter the **Organization Name.**
3. Select a **User** from the dropdown.
4. Select the **User Location.**
5. Is the selected user a DESY User?
   a. If Yes, enter the EUA User ID.
   b. If No, No EUA ID is asked for.
6. Select the **Submit** button.

Notes:
- Adding a **DESY User** adds the user as a **Custodian** on the DUA.

DUA Requester – Update/Amend

DESY USER Screen: DESY User Table

1. The user displays in the table.
2. You can select the **Add Custodian/DESY User** button to add another DESY User.
3. You can select the **Edit** link to edit the Custodian/DESY User.
4. You can select the **Remove** link to remove Custodian/DESY User from the table.
5. Select the **Done** button when all **Custodian/DESY Users** have been added/updated.
Note: Removing a **Custodian/DESY User** from the table removes them as a **Custodian** on the DUA.

DUA Requester – Update/Amend

Edit DUA: Upload Documents

Select the **Edit** button associated with the **Documents** section to upload supporting documentation if applicable.

DUA Requester – Update/Amend

Edit DUA: Upload Documents

Update DUA Request

DUA Number : CONT-2018-54153

UPLOAD DOCUMENTS

You may upload one or more documents to support your DUA.

	Document	Uploaded Files	Upload Document
1	SIGNATURE ADDENDUM	Signature_Addendum.docx Download Delete	**Upload Documents**

Done

1. The **Upload Documents** screen displays with a predefined document type table. In this example, the **Signature Addendum** file was uploaded when the DUA was created. The **Signature Addendum** is a required document.
2. Select the **Upload Documents** button to upload additional supporting documents from your local computer.

Note:
- Max file size is 2 megabytes and not all file types can be uploaded.
- A new Signature Addendum is required if any new Custodian/DESY Users were added to the DUA.

DUA Requester – Update/Amend

Edit DUA: Upload Documents

1. The **Upload Documents** pop-up displays.
2. Select the **Choose Files** button to select the supporting document(s) from your local computer.
3. Select the **Upload** button.

Notes:
- Max file size is 2 megabytes.
- Not all file types can be uploaded. EPPE will display a message when attempting to upload non-allowable file types.
- For easy recognition, please name files appropriately based on contents.

DUA Requester – Update/Amend

Edit DUA: Upload Additional Documents

1. The document displays in the **Upload Documents** table.
2. Select the **Upload Documents** button to select additional files from your local computer if needed.
3. Select the **Done** button.

DUA Requester – Update/Amend

Edit DUA: Add Comments

1. All updates of the DUA are complete.
2. Enter any applicable **Comments** (optional).
3. Select the **Next** button.

Edit DUA: Terms and Conditions

1. The **Terms and Conditions agreement screen** displays (shown in 2 parts for legibility).
2. Select the **I agree to the terms and conditions above** check box.
3. Use your browser to print (if applicable).
4. Select the **Submit** button.

DUA Requester – Update/Amend

Edit DUA: Submitted Message

1. The confirmation message displays.
2. Select the **Print DUA** button to print or save the DUA as a PDF.
3. Select the **green plus sign** icon to view the **DUA Life Cycle**.
4. The DUA can be viewed in the **Submitted** queue.
5. The DUA will need to be reviewed and **Approved** by the **COR** and then **Certified** by the **DMT** before it displays in the **Approved** queue.

DUA Requester – Help
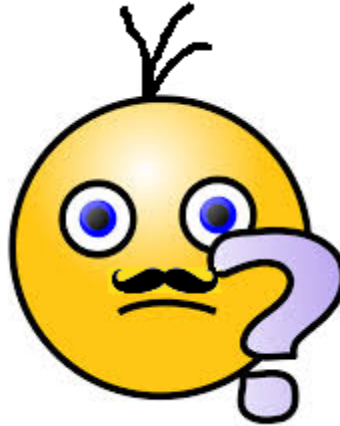
EPPE Help Desk Contact Information

Hours of Operation: Monday – Friday 9:00 AM to 6:00 PM EST

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