# PeopleSoft Finance Access Training Guide

## How To: Approve Access

### Purpose:

1. **“How To” Approve Access**

<table>
<thead>
<tr>
<th>Step#</th>
<th>Illustration:</th>
<th>Description:</th>
</tr>
</thead>
</table>
| 1. | | Approve Access:  
The **PeopleSoft Security Access** allows employees, major area budget managers and other workflow approvers to Approve, Send Back or Deny the requested on-line security access form. This guide describes how to Approve Access. |
| 2. | To access the on-line Finance Access Forms first **Log into WaveNet.** |
| 3. | Log into the Central Authentication Service, also known as CAS, with your Network ID and Password. |

---

Rev July 26th, 2013  
Page - 1 - of 8
### PeopleSoft Finance Access Training Guide

**How To: Approve Access**

<table>
<thead>
<tr>
<th>PeopleSoft Security Access:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigate to the menu-bar linked list; under <strong>Staff Resources</strong> and click on the link <strong>PeopleSoft Security Access</strong> this opens the view to the <strong>PeopleSoft Finance Access Forms</strong>.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Finance Access Forms:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Besides the link to this document, the <strong>Training Guide</strong>, there are links to:</td>
</tr>
<tr>
<td>- Request/Modify Access</td>
</tr>
<tr>
<td>- Approve Access</td>
</tr>
<tr>
<td>- View Existing Access</td>
</tr>
</tbody>
</table>

1. Select the **Approve Access** link.

This opens the **Approve Access** work list view.

---

4. **PeopleSoft Security Access:**

   Navigate to the menu-bar linked list; under **Staff Resources** and click on the link **PeopleSoft Security Access** this opens the view to the **PeopleSoft Finance Access Forms**.

5. **Finance Access Forms:**

   Besides the link to this document, the **Training Guide**, there are links to:

   - Request/Modify Access
   - Approve Access
   - View Existing Access

   1. Select the **Approve Access** link.

   This opens the **Approve Access** work list view.
6. **Approve Access**

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Submitter By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Krukowski, Leonard</td>
<td>Krukowski, Len - Trainer</td>
</tr>
<tr>
<td>Krukowski, Leonard</td>
<td>Leonard Krukowski</td>
</tr>
</tbody>
</table>

**Approve Access – Transactions to Approve:**

The approval work list is available to all users who have requests which need their approval (they received an email notification).

Clicking on a link will open the request page, where Workflow buttons allow the approver to Approve, Send-back or Deny.

When there are no Access Request forms to approve, an informative message appears.

1. **Select the transaction to Approve by clicking on the employee ID link in the Approve field.**

This opens the **Request Access** tab for that request.

7. **Request Access tab view:**

1. **Confirm the information in the header, note the request type and the requested date the change will become effective.**
Request Access tab view (continued):

1. Continue on to confirm the existing/added Requesting Department Access and the General User Finance roles...

Note the boxes checked will indicate both existing and added roles.

Also note for Finance Office Only, click the expansion arrow to view any Finance Office roles requested.
PeopleSoft Finance Access Training Guide
How To: Approve Access

9. Request Access tab view (continued):

In this example a requestor submitted the Request. The employee action will be to: Approve, Send Back or Deny.

Note that the employee cannot modify this access request, only the Requestor/Submitter may make modifications.

1. Click on the Approve button, to approve this requested security access. This will display the PeopleSoft Statement of User Responsibility that must be agreed upon before the employee can Approve.

OR

2. Click on the Send Back button, to ask for a change or correction to the requested access.

OR

3. Click on the Deny button, to deny any changes to the requested access.

Note: a Send Back or Deny action needs an Approver’s Comment as to the reason for the send back or denial.

If approved an email notification will be sent to the Major Area Budget Manager requesting their approval.

If sent back or denied an email notification will be sent to the requestor/submitter with Approvers comments.
PeopleSoft Finance Access Training Guide
How To: Approve Access

10. **Request Access** tab view (continued):

   In this example the employee submitted the Request. The action here, is for the Major Area Budget Manager to Approve, Send Back or Deny.

   1. **Click on the Approve button**, to approve this requested security access.

   OR

   2. **Click on the Send Back button**, to ask for more information or provide additional instruction for the requested access.

   OR

   3. **Click on the Deny button**, to deny any changes to the requested access.

   *Note: a Send Back or Deny action needs an Approver's Comment as to the reason for the send back or denial.*

   If approved an email notification will be sent to the Finance Reviewer requesting their approval.

   If sent back or denied an email notification will be sent to the requestor/submitter with Approvers comments.
PeopleSoft Finance Access Training Guide
How To: Approve Access

11. Request/Modify Access tab view:

Navigate back to the Finance Forms Access and click on Request/Modify Access and enter a name in the **Find an Existing Value** tab to view the progress of the report.

1. Click on any field link for that employee to view the progress of the Workflow Status.

Notice the **Request Status** field provides a quick view status summary.

12. Request/Modify Access tab view – **Workflow Status**:

In this view anyone with Request/Modify Access privileges may view the progress of the Workflow Status for any user.
## PeopleSoft Finance Access Training Guide
### How To: Approve Access

| 13. | Upon completion of your approval actions, you may wish to navigate back to the WaveNet home page or if finished, Logout of WaveNet. |
|     | For information on how to Request/Modify Access see the PeopleSoft Finance Request/Modify Access Training Guide. |
|     | For information on how to View Existing Access, see the PeopleSoft Finance View Existing Access Training Guide. |
|     | For questions regarding the Finance Access Forms process or comments/suggestions regarding this document or ... please call or email: |
|     | Len Krukowski: x6807 |
|     | Leonard.Krukowski@Pepperdine.edu |