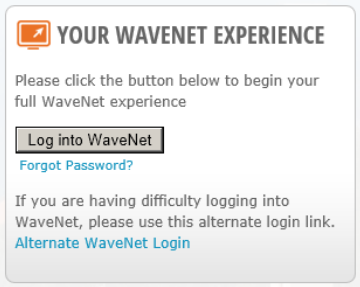
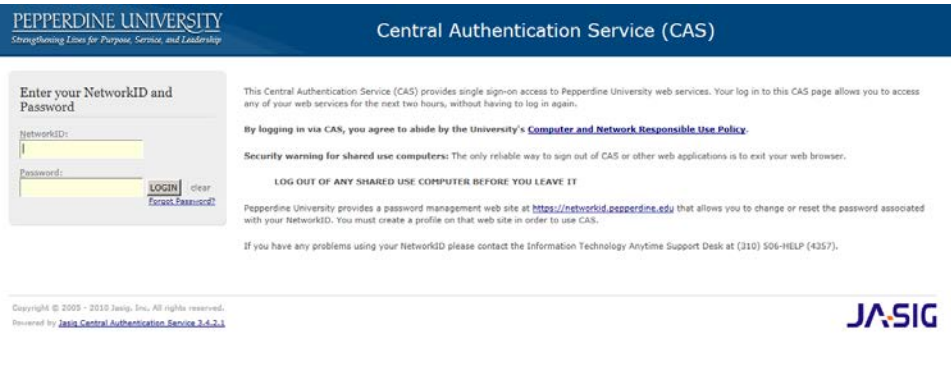


# PeopleSoft Finance Access Training Guide

## How To: Approve Access

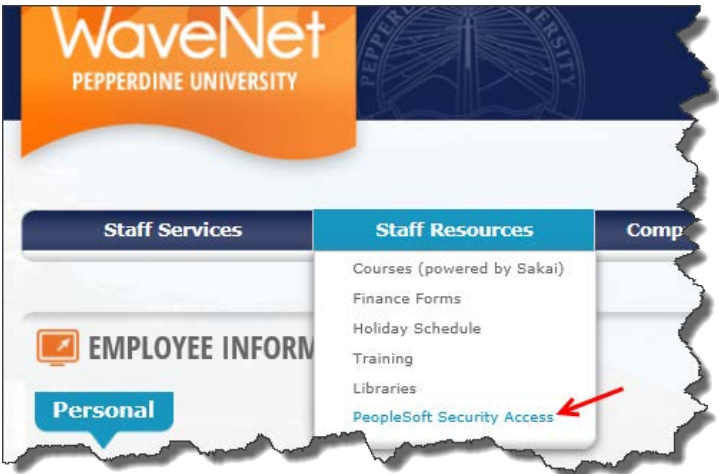
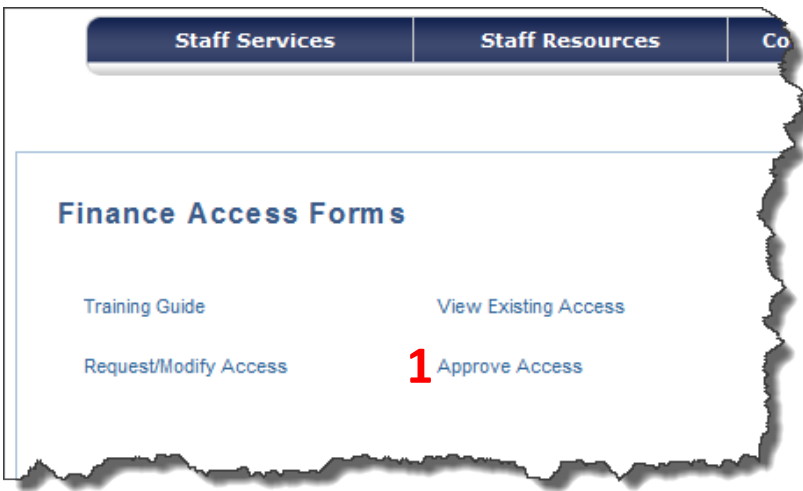
Purpose:

### 1. "How To" Approve Access

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

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4.	 <p>The screenshot shows the WaveNet Pepperdine University interface. At the top, there is a navigation bar with 'WaveNet' and 'PEPPERDINE UNIVERSITY' logos. Below this, there are three main menu categories: 'Staff Services', 'Staff Resources', and 'Comp'. The 'Staff Resources' menu is expanded, showing a list of options: 'Courses (powered by Sakai)', 'Finance Forms', 'Holiday Schedule', 'Training', 'Libraries', and 'PeopleSoft Security Access'. A red arrow points to the 'PeopleSoft Security Access' link.</p>	<p><b>PeopleSoft Security Access:</b></p> <p>Navigate to the menu-bar linked list; under <b>Staff Resources</b> and click on the link <b>PeopleSoft Security Access</b> this opens the view to the <b>PeopleSoft Finance Access Forms</b>.</p>
5.	 <p>The screenshot shows the 'Finance Access Forms' page. At the top, there is a navigation bar with 'Staff Services', 'Staff Resources', and 'Co'. Below this, there is a section titled 'Finance Access Forms'. Under this section, there are four links: 'Training Guide', 'View Existing Access', 'Request/Modify Access', and 'Approve Access'. The 'Approve Access' link is highlighted with a red '1'.</p>	<p><b>Finance Access Forms:</b></p> <p>Besides the link to this document, the <a href="#">Training Guide</a>, there are links to:</p> <ul style="list-style-type: none"><li>• <a href="#">Request/Modify Access</a></li><li>• <a href="#">Approve Access</a></li><li>• <a href="#">View Existing Access</a></li></ul> <p><b>1.</b> Select the <b>Approve Access</b> link.</p> <p>This opens the <b>Approve Access</b> work list view.</p>

# PeopleSoft Finance Access Training Guide

## How To: Approve Access

6.	<p><b>Approve Access</b></p> <p><b>WORKLIST</b></p> <p>Transactions to Approve <span style="float: right;">Find   [Icons]   First [X] Last</span></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">Approve</th> <th style="width: 10%;">Employee Name</th> <th style="width: 80%;">Submitted By</th> </tr> </thead> <tbody> <tr> <td>10 [Icons] -5 <b>1</b></td> <td>Krukowski, Leonard</td> <td>Krukowski, Len - Trainer</td> </tr> <tr> <td>10 [Icons] -4</td> <td>Krukowski, Leonard</td> <td>Leonard Krukowski</td> </tr> <tr> <td>10 [Icons] -2</td> <td>Krukowski, Leonard</td> <td>Krukowski, Len - Trainer</td> </tr> </tbody> </table> <div style="border: 1px solid gray; padding: 10px; background-color: #f0f0f0;"> <p style="text-align: center;">Staff Services    Staff Resources</p> <p style="text-align: center; font-size: 1.2em;"><b>Approve Access</b></p> <p style="text-align: center; color: blue;">There are no Access Request Forms to Approve</p> </div>	Approve	Employee Name	Submitted By	10 [Icons] -5 <b>1</b>	Krukowski, Leonard	Krukowski, Len - Trainer	10 [Icons] -4	Krukowski, Leonard	Leonard Krukowski	10 [Icons] -2	Krukowski, Leonard	Krukowski, Len - Trainer	<p><b>Approve Access – Transactions to Approve:</b></p> <p>The approval work list is available to all users who have requests which need their approval (they received an email notification).</p> <p>Clicking on a link will open the request page, where Workflow buttons allow the approver to Approve, Send-back or Deny.</p> <p>When there are no Access Request forms to approve, an informative message appears.</p> <p><b>1.</b> Select the transaction to <b>Approve</b> by clicking on the employee ID link in the Approve field.</p> <p>This opens the <b>Request Access</b> tab for that request.</p>
Approve	Employee Name	Submitted By												
10 [Icons] -5 <b>1</b>	Krukowski, Leonard	Krukowski, Len - Trainer												
10 [Icons] -4	Krukowski, Leonard	Leonard Krukowski												
10 [Icons] -2	Krukowski, Leonard	Krukowski, Len - Trainer												
7.	<div style="border: 1px solid gray; padding: 5px;"> <p>Request Access    Existing Access</p> <p>Empl ID: 1 [Icons]      Request Nbr: 11</p> <p>Name: Krukowski, Leonard      leonard.krukowski@pepperdine.edu</p> <p>Job Title: Team Leader, EIS Training      Telephone:</p> <p>Request Type: New/Modify <b>1</b>      Requested Change Date: 07/24/2013</p> <p>Request Status: In Approval Process      Submitted By: [Icons]</p> <p>MABM Approver: [Icons]      [Icons]</p> <p style="color: blue; font-size: 0.9em;">For Query Manager access - A Restricted Data Security form must be completed for this access: Query Manager Request Form</p> <p style="color: blue; font-size: 0.8em;">Notice: If a modify security access is being entered; the submitter MUST also select his/her existing roles, otherwise any previous security access will be removed. The submitter MUST also list his/her existing department access, otherwise any previous department access will be removed.</p> <p style="font-size: 0.8em;">Requesting Department Access      Customize   Find   [Icons]   First 1-4 of 4 Last</p> </div>	<p><b>Request Access</b> tab view:</p> <p><b>1.</b> Confirm the information in the header, note the request type and the requested date the change will become effective.</p>												

# PeopleSoft Finance Access Training Guide

## How To: Approve Access

8.

Department	Description
00000KK	Pepperdine University
11190	IT ERP
11250	IT Info Services & Program Mgt
12008	Interdepartmental Transactions

**General User**

**General**

<input type="checkbox"/>	Credit Card Access
<input checked="" type="checkbox"/>	Simpler Reporting Tool
<input checked="" type="checkbox"/>	Query Viewer
<input checked="" type="checkbox"/>	Travel & Expense Entry
<input checked="" type="checkbox"/>	Requisition Requestor
<input type="checkbox"/>	Requisition Reviewer
<input type="checkbox"/>	Req Approver \$12.5K (Level 1)
<input type="checkbox"/>	Req Approver \$25K (Level 2)
<input type="checkbox"/>	Internal Requisition Receiver
<input type="checkbox"/>	Requisition Inspection

**Finance Office Only**

Last Updated: 07/22/13 2:00:41PM Updated By: PDEVLXK

Approver's Comments

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

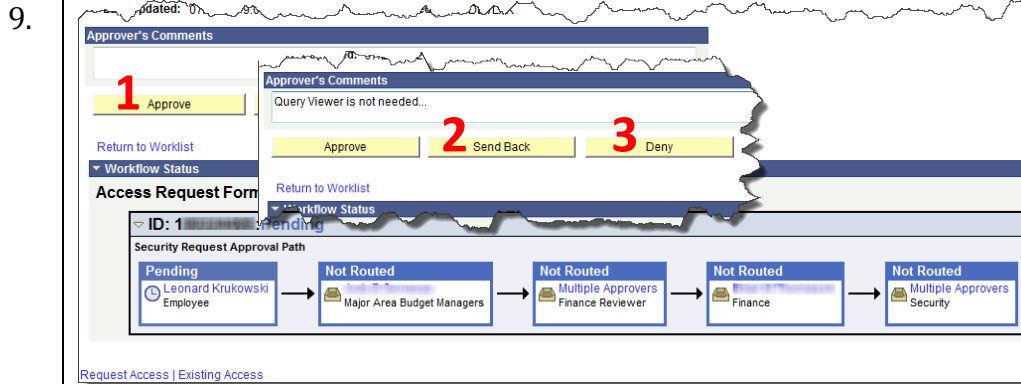
**1.** Continue on to confirm the existing/added **Requesting Department Access** and the **General User Finance** roles...

*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



### 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.*

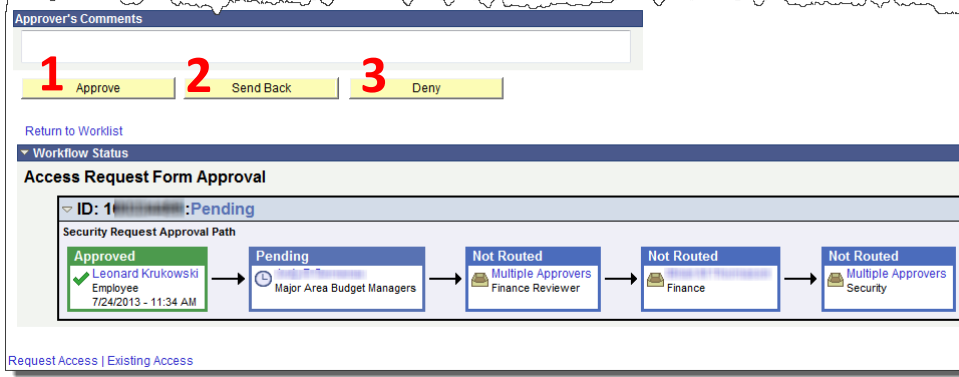
If approved an email notification will be sent to the Major Area Budget Manager requesting their approval.

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

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

Limit the number of results to (up to 300): 300

Empl ID: begins with [ ]

Security Form Request Number: = [ ]

Name: begins with [ Krukow ]

Request Type: = [ ]

Request Status: = [ ]

Requested Date: = [ ]

Submitted By: begins with [ ]

Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Results

Empl ID	Security Form Request Number	Name	Request Type	Request Status	Requested Date	Submitted By
1000000009		Krukowski,Leonard	New/Change	In Appr	07/23/2013	

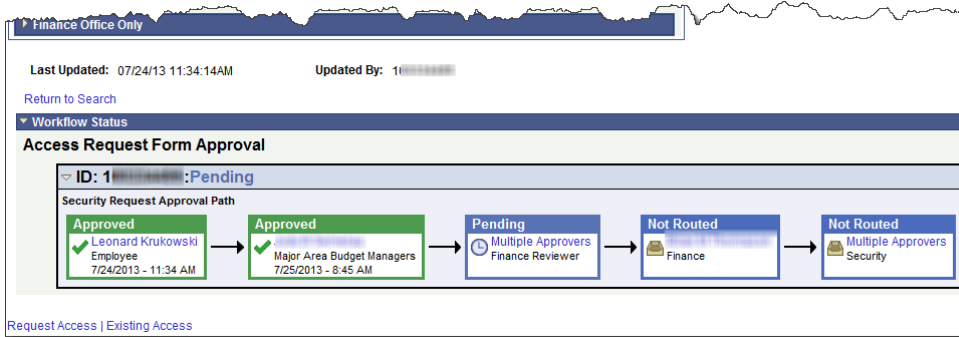
**Request/Modify Access** tab view:

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.

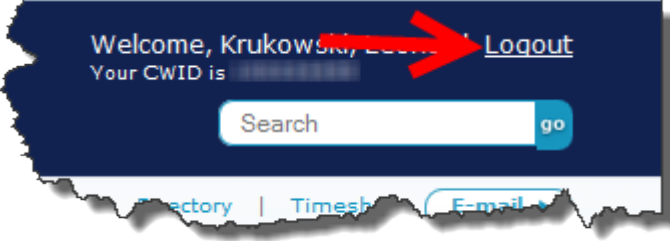


**Request/Modify Access** tab view – **Workflow Status:**

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.	 A screenshot of the PeopleSoft Finance Access page. The page has a dark blue header with the text 'Welcome, Krukowski, Leonard' and 'Your CWID is'. A red arrow points to the 'Logout' link in the top right corner. Below the header is a search bar with the text 'Search' and a 'go' button. At the bottom of the page, there are links for 'Factory', 'Timesheet', and 'E-mail'.	<p>Upon completion of your approval actions, you may wish to navigate back to the WaveNet home page or if finished, Logout of WaveNet.</p> <p>For information on how to <b>Request/Modify Access</b> see the PeopleSoft Finance <a href="#">Request/Modify Access Training Guide</a>.</p> <p>For information on how to <b>View Existing Access</b>, see the PeopleSoft Finance <a href="#">View Existing Access Training Guide</a>.</p>
		<p>For questions regarding the Finance Access Forms process or comments/suggestions regarding this document or ... please call or email:</p> <p>Len Krukowski: x6807 Leonard.Krukowski@Pepperdine.edu</p>