# PeopleSoft Finance Access Training Guide

## How To: **Request/Modify Access**

Purpose:

1. Introduce the On-Line **Finance Access Forms.**
2. "How To" **Request/Modify Access: Add a New Value**
3. "How To" view your requested security access workflow and your existing department and user roles.

<table>
<tr><th>Step#</th><th>Illustration:</th><th>Description:</th></tr>
<tr>
<td>1.</td>
<td>


PEPPERDINE UNIVERSITY

PEOPLESOFT FINANCIALS ACCESS APPLICATION

User Type: New ☐ Modify/Change ☐

User Information (All fields are required)

Name (Last, First, MI) ______ Campus-Wide ID ______
Job Title ______ Extension ______
E-mail ______ Mail Code ______
Department Name ______ Dept ID #s ______

General User (Check all that apply)

Requisition Requestor ☐
Requisition Reviewer ☐
Requisition Inspection ☐
Requisition Approver ☐ 25 K ☐
Internal Requisition Receiver ☐

Accounts Payable

Payment Process

Additional Notes ______

By signing this form, I acknowledge that I have read and agreed to adhere to the PeopleSoft Statement of User Responsibility.

Requestor (Signature) Print Name Date Extension

Major Area Budget Manager or Vice President (Signature) Print Name Date Extension

Finance Approval (Signature) Print Name Date Extension

Security Administrator Approval (Signature) Print Name Date Extension

Return Completed Form to the Finance Office - Mail Code 4497

Page 1 of 2 Version: 05/03/13
</td>
<td>
On-Line Finance Access Forms<br>
This new electronic process is set to go live August 19th 2013, eliminating the hard copy Financials Access Application as shown on the left.<br><br>
The primary functions of the on-line Finance Access Forms provide three selections:<br><br>
<u>Request/Modify Access</u>:<br>
This will allow the user to initiate a process to request security access changes for themselves or for others.<br><br>
Additionally the user can view their existing departmental and user roles as well as the ability to view the workflow status of the requested changes.<br><br>
<u>Approve Access</u>:<br>
This selection allows employees, major area budget managers and other workflow approvers to Approve, Send Back or Deny the requested on-line security access form.<br><br>
<u>View Existing Access</u>:<br>
Provides users the ability to view the existing security access roles and department access for themselves or any other user.
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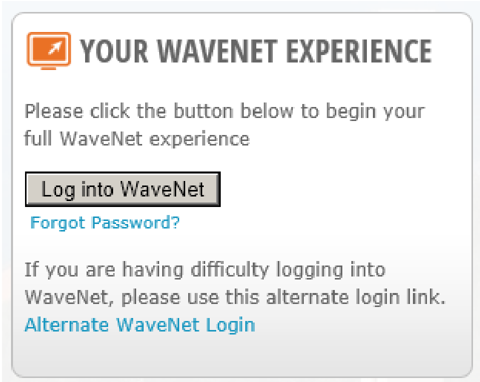
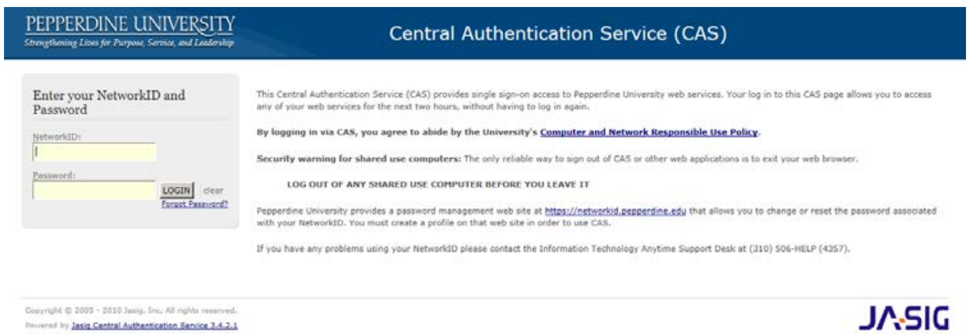
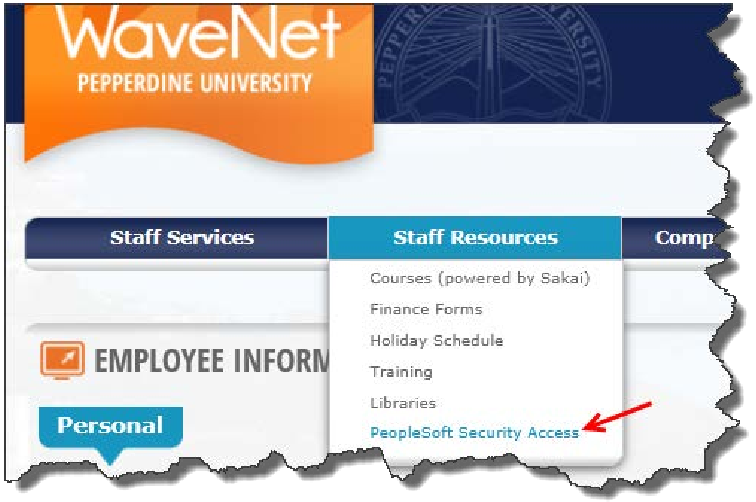
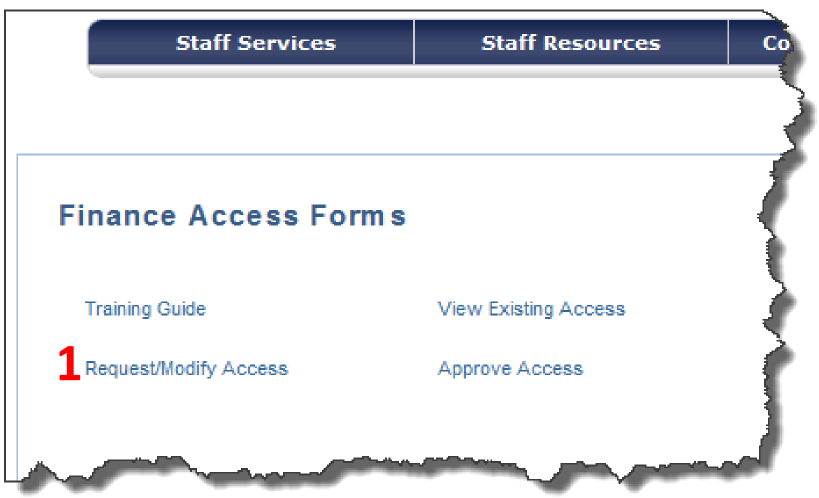
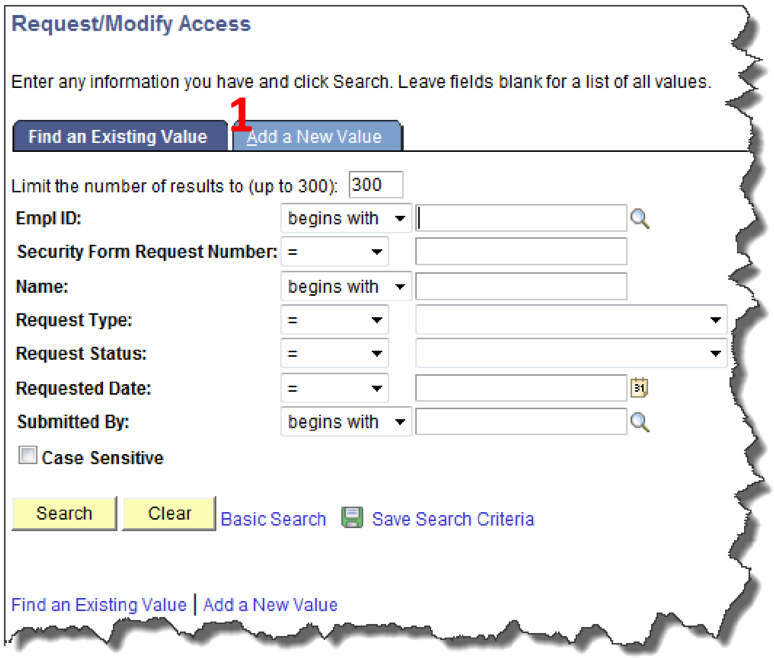
</table>

<table>
<tr><td>2.</td><td>
</td><td>To access the on-line Finance Access Forms first Log into WaveNet.</td></tr>
<tr><td></td><td></td><td></td></tr>
<tr><td>3.</td><td>
</td><td>Log into the Central Authentication Service, also known as CAS, with your Network ID and Password.</td></tr>
</table>

| | | |
|---|---|---|
| 4. |  | **PeopleSoft Security Access:**<br><br>Navigate to the menu-bar linked list; under **Staff Resources** and click on **PeopleSoft Security Access** this will open the view to the **Finance Access Forms.** |
| | | |
| 5. |  | **Finance Access Forms:**<br><br>Besides the link to this document, the Training Guide, there are links to:<br>• Request/Modify Access<br>• View Existing Access<br>• Approve Access<br><br>*1. Select the **Request/Modify Access** link* |

6.



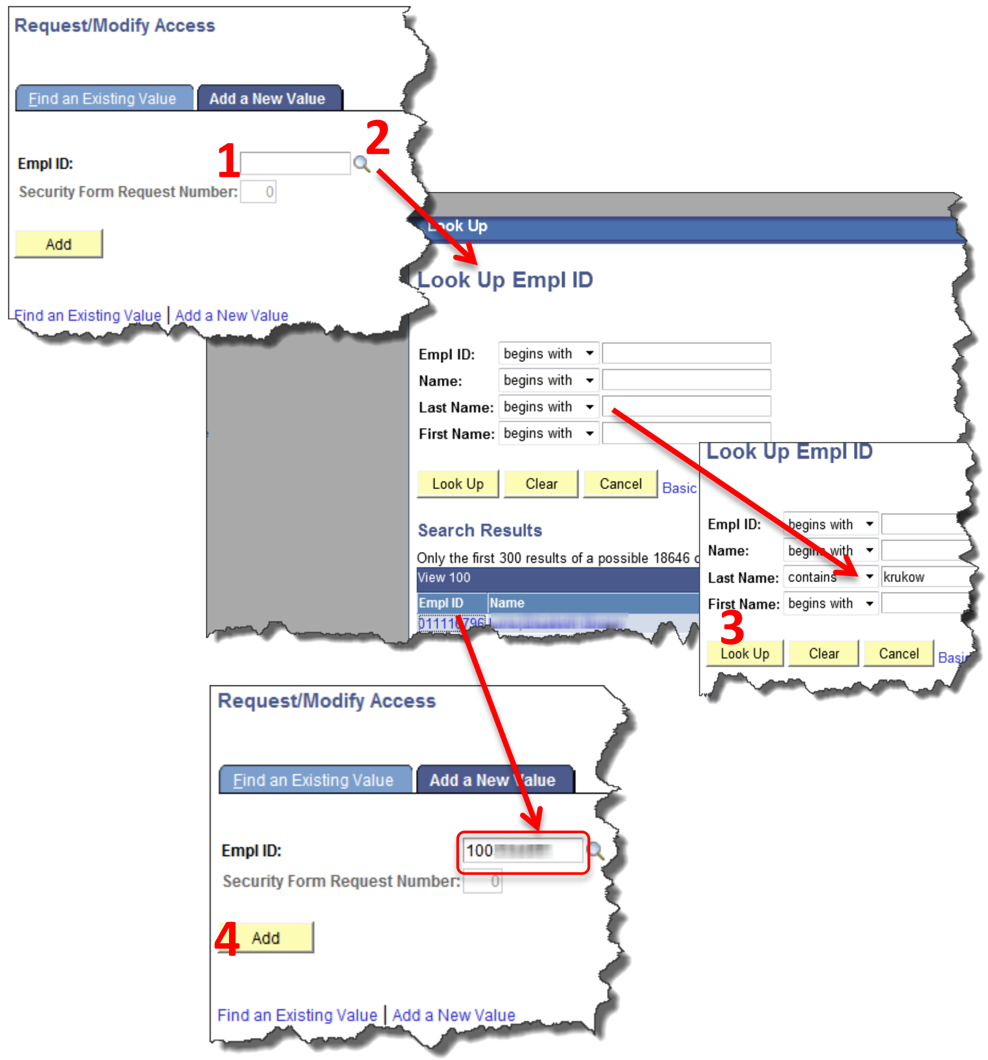

## Request/Modify Access:  Add a New Value

The **Request/Modify Access** view will provide two tabs: **Find an Existing Value** and **Add a New Value**

***1.*** *Select the **Add a New Value** tab to add a new or modify an access request.*

For instructions on how to **Find an Existing Value**, go to step # 23 on page 16

7.




**Add a New Value:**
A new security access request may be initiated by either the employee requiring the security or by another individual such as the employee's supervisor.

If the employee submits the request, the workflow will then go immediately to the **M**ajor **A**rea **B**udget **M**anager (MABM).

If someone else submits a new request for an employee, the workflow is then sent to the employee first for approval before being sent to the MABM.

1. *Enter the **Empl ID** (the Campus Wide ID)*

**OR** If the CWID is unknown:

2. *Click on the Look Up icon and use one of the search fields such as one of **Name** fields.*

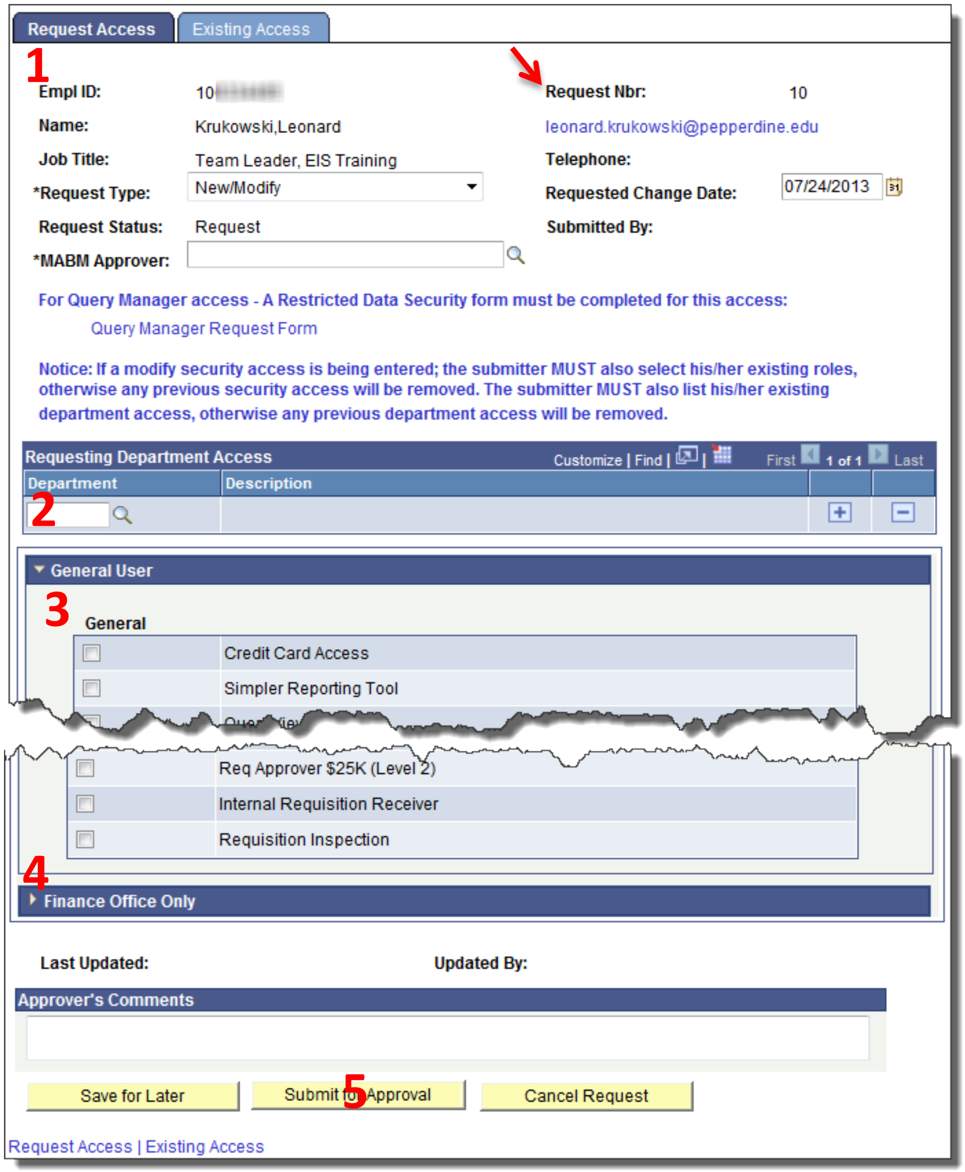
It is recommended, that when searching for a string such as a name, to use the **Contains** operator (rather than Begins With) as Contains will provide a greater probability of finding a match for the needed name.

3. *Enter the name string and select the **Look Up** button. One or more employee names with employee ID will appear in the Search Results. Select the appropriate employee by clicking on any of the links associated to that employee.*

The employee's ID will appear in EMPL ID field.

4. *Select the **Add** button.*

8.




The **Request Access** tab appears. This view will be used to input the information to add a **New** or **Modify** a security access for the employee whose name appears in the header.

There are five sections to this tab view:

1. ***The header**: contains employee information along with required fields needing input:*
   - ***Request Type** = New/Modify or Inactivate*
   - ***Requested Change Date***
   - ***MABM Approver***

   *Note the **Request Status** field will provide the most current status of this Request*

   *Also note each Request will be tracked with a number id*

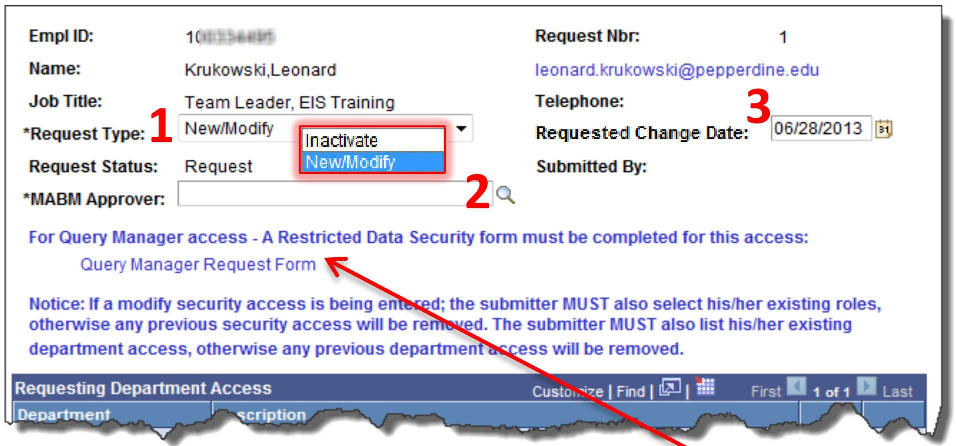
2. ***Requesting Department Access**: input one or more department numbers where the security access will be needed.*

3. ***General User**: a list of security functions to be added or modified for specific Finance roles.*

4. ***Finance Office Only**: for use by the Finance department only.*

5. ***Save for Later/Submit for Approval/Cancel** buttons.*

9.




In the header section:

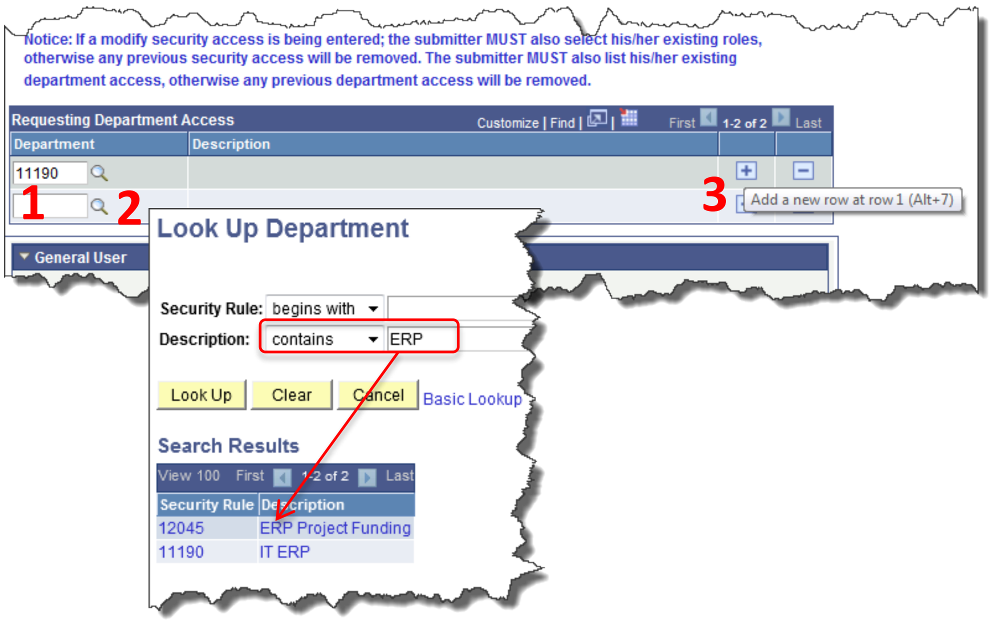
1. *Confirm the **Request Type** is: New/Modify (Note that Inactivate is used to remove all Finance security access, such as may be the case when someone changes jobs).*
2. *Select the **M**ajor Area **B**udget **M**anager Approver: a complete list of Major Area Budget Managers can be viewed by selecting the Look Up icon. From that list select the appropriate MABM, their employee ID will appear in the field. (This is a required entry)*
3. *Enter the requested date by either manually typing in the date or click on the calendar icon to selectively choose a month, day and year.*

Note the text below the MABM Approver field. This on-line form does not provide security access for the **Query Manager.**

You may click the link **Query Manager Request Form** to locate the Restricted Data Security form under the Information Technology WaveNet Forms.

Or click on this hyperlink:
http://community.pepperdine.edu/it/content/restricteddatasecurityformcheckboxfinal.pdf

10.




In the Requesting Department Access section:

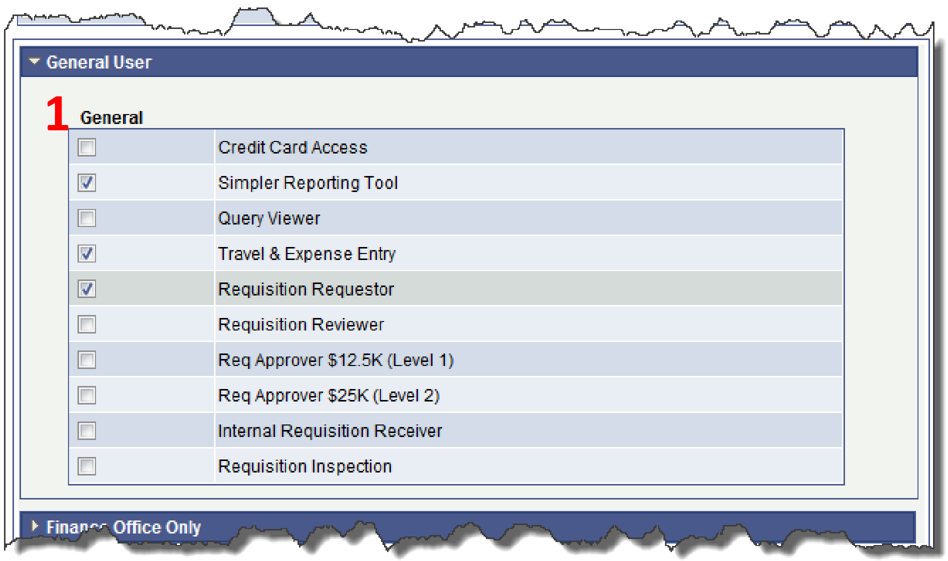
1. *Enter the department ID number for which the user needs access.*
2. **Or** *if the department ID is not known, use the Look Up icon and enter a search string in the Description field. (remember to use Contains), then select that dept.*
3. *Multiple departments may be entered by clicking the* **+** *symbol icon, thus adding a new row.*

   *Use the* **–** *symbol to remove the row.*

**IMPORTANT**: if an additional department access is required; the submitter MUST also list existing department(s) access, otherwise any existing departmental access will be removed.

**NOTE**: Select the **Existing Access** tab to provide a read only view of the employee's current departmental security roles.

11.




In this example the user needs additional security access to the **Simpler Reporting Tool** and currently has (and still requires) **Travel & Expense Entry** and **Requistion Requestor** security access. Consequently all three security accesses must be checked.

In the General User section:

*1. Select the check box for one or more security access:*

- ☐ **Credit Card Access** - chartfield reallocation and monthly billing substantiation
- ☐ **Simpler Reporting Tool -** budget, transaction and payroll reports
- ☐ **Query Viewer -** run/schedule and view queries
- ☐ **Travel & Expense Entry -** employee reimbursement for out of pocket expenses
- ☐ **Requisition Requestor -** procurement of goods and services
- ☐ **Requisition Reviewer –** reviewer of goods and services to be purchased
- ☐ **Requisition Approver 12.5K -** Level 1 approval of goods and services (needs CFO approval)
- ☐ **Requisition Approver 25K -** Level 2 approval of goods and services (needs CFO approval)
- ☐ **Internal Requisition Receiver -** processes Requisitions for internal vendors within the PUINT business unit
- ☐ **Requisition Inspection –**inspector of goods received

**IMPORTANT**: if a new security access is being added; the submitter MUST also select existing roles, otherwise any previous security access will be removed.

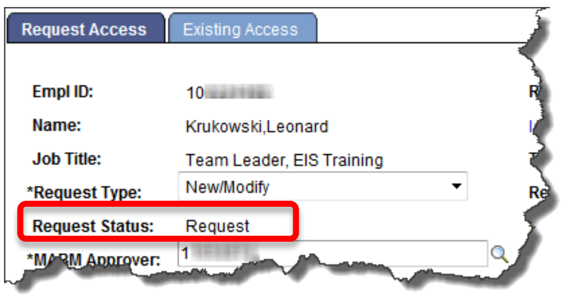
**NOTE**: Select the **Existing Access** tab to provide a read only view of the employee's current security roles.

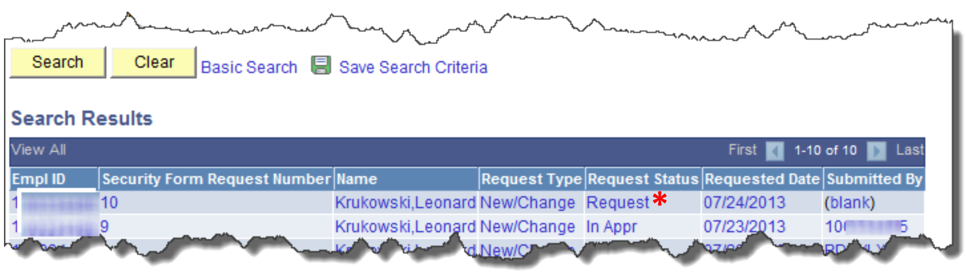
12.


**Finance Office Only section:**

For questions about this section or to find out if you need access to any of these Finance roles then please contact the Director of Accounting @ x4742

13.


A saved **Request** is located in the Request/Modify Access view under the Find an Existing Value tab. Click on any link to re-open your saved Request.

The Save/Submit/Cancel buttons:

- **Save for Later:** This action allows the user to save their Request Security inputs. The **Request Status** does not change and remains set to **Request**.

  Use the Request/Modify Access view and select the **Find an Existing Value** tab and enter the employee ID or Name to **Search** for the saved Request*.

- **Submit for Approval:** The **Request Status** changes to **Submitted** and the data is saved.

  If the submitter is not the employee the workflow will be sent from the submitter to the employee for approval.

  If the submitter is the employee a secondary page opens, prompting the user to accept responsibility.

- **Cancel Request:** Forms that were not submitted may be cancelled, by clicking the Cancel button; consequently Cancelled forms may no longer be modified. The **Request Status** is changed to **Cancelled**.

<table>
<tr>
<td>14.</td>
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<td>NOTICE: In certain situations where a “user profile” does not yet exist, a detailed error message will appear when attempting to submit for approval.<br><br>In this case select Save for Later, then email: PSSecAdmin@pepperdine.edu and provide the employee’s Full Name and CWID.</td>
</tr>
<tr><td></td><td></td><td></td></tr>
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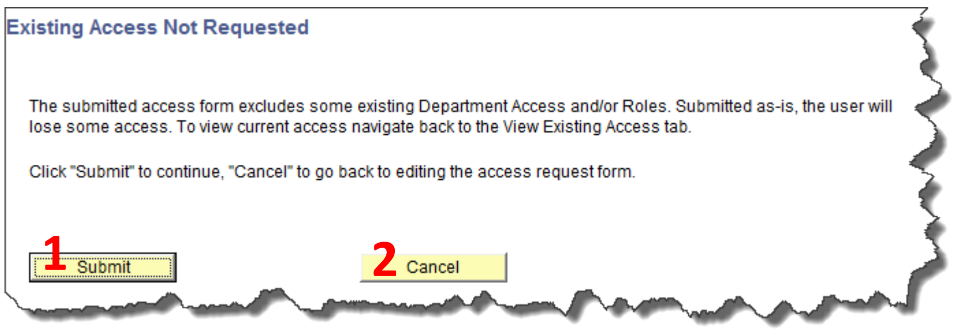
<td>15.</td>
<td>
</td>
<td>NOTICE: If the submitted security form excludes either existing Department Access and/or Roles this message will appear indicating that if the form is submitted as-is, the user will lose some access privileges.<br><br>It is recommended to Cancel which navigates back to the Request Access tab, allowing you to add those departmental values and user roles before submitting.<br><br>1. Select Submit to continue<br>Or<br>2. Select Cancel to return to the form and input all the needed values.</td>
</tr>
<tr><td></td><td></td><td></td></tr>
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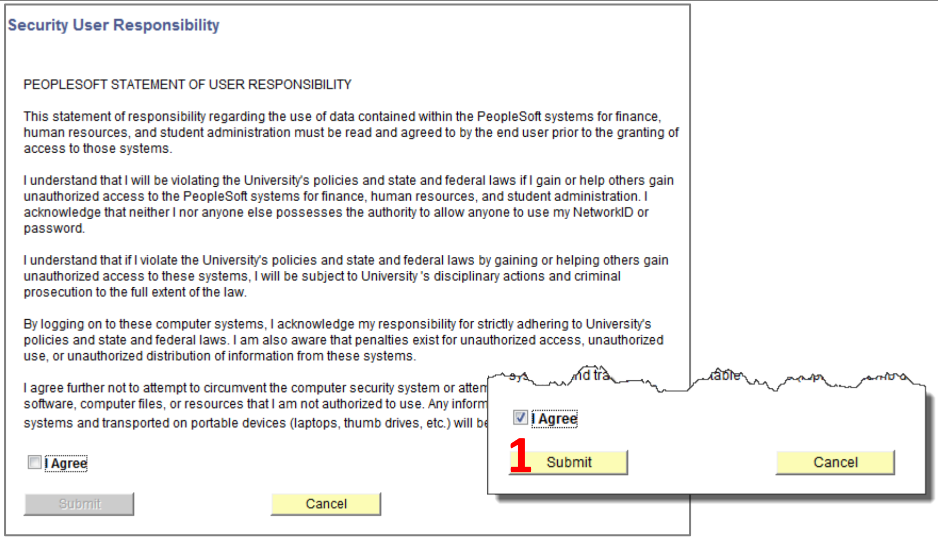
<td></td>
<td></td>
<td>The following steps will demonstrate the two Submit for Approval workflow methods:<br>a) when submitted by the employee<br>b) when submitted by a requestor for the employee</td>
</tr>
</table>

16.

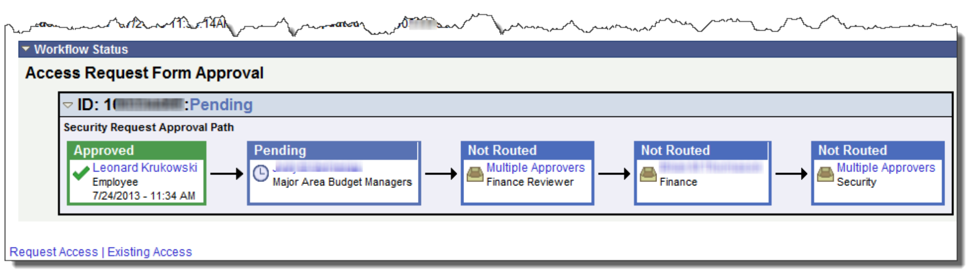


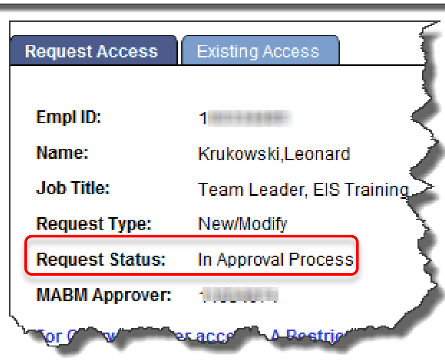

*a) The **Submit for Approval workflow** when submitted by the employee:*

When submitted by the employee, the employee will immediately be prompted to read and agree to the **PeopleSoft Statement of User Responsibility**.

*1. Check the **I Agree** box and then click the **Submit** button.*

17.



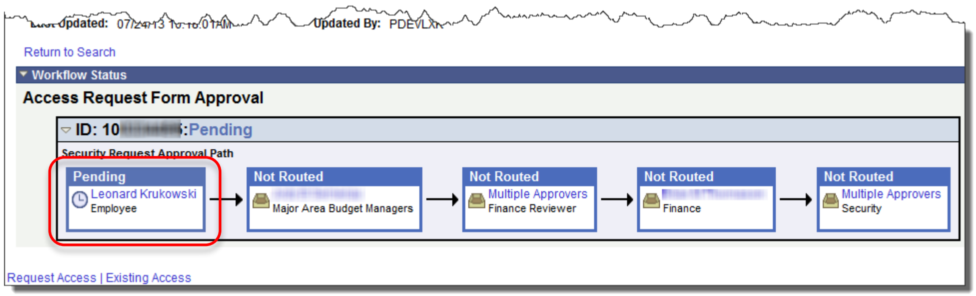
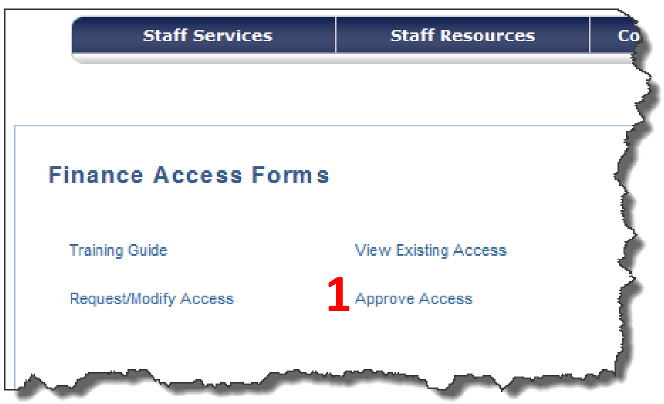
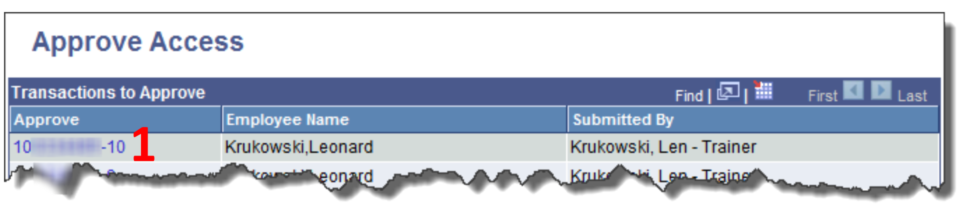




Once Submitted the Workflow Status appears at the bottom of the page indicating the Submitter (Employee) has Agreed and Approved their Access Request.

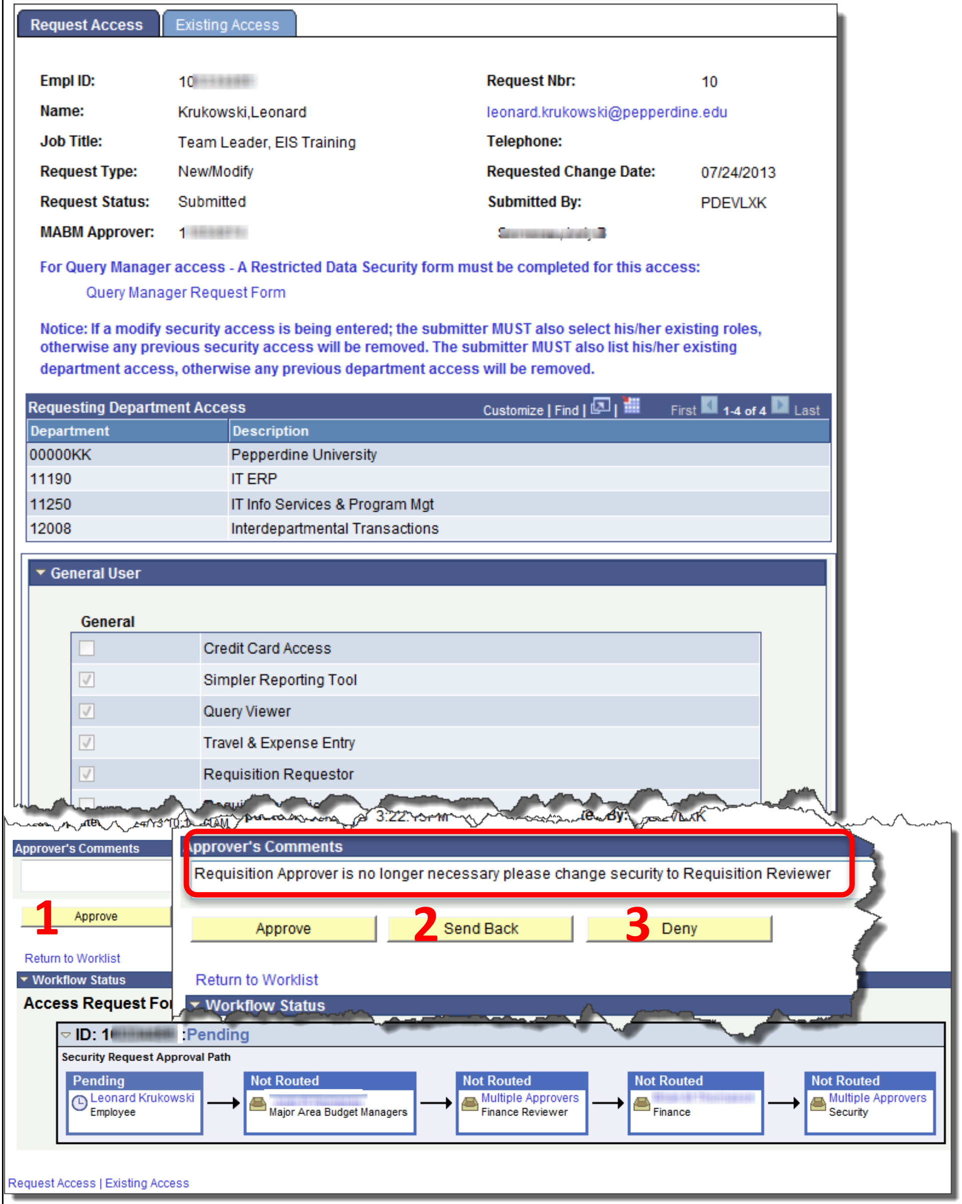
Notice in the header, the **Request Status** changes from "Request" to "In Approval Process", and the MABM Approver is notified by email that the requested security access transaction is in their workflow queue ready for approval.

Depending on the requested security access the workflow approval is routed from the MABM to a Finance Reviewer to Finance with the final approval and access granted from IT Security.

Note that anytime in the workflow, the request can be denied or sent back for more information.

| | | |
|---|---|---|
| 18. |  | b) *The **Submit for Approval workflow** when submitted by a requestor for the employee:*<br><br>Since a requestor (supervisor) requested the security access change, the workflow will notify the employee by email that the requested security access is awaiting approval from the employee. |
| | | |
| 19. |  | Once the employee is notified of their pending approval the employee will navigate to the **Finance Access Forms** links providing the link to **Approve Access**<br><br>*1. Select the* **Approve Access** *link.*<br><br>This will open the Approval Work list allowing the employee to view the **Transactions to Approve**. |
| | | |
| 20. |  | *1. Under the **Approve** column, click on the EMPL ID link.*<br><br>This will open the **Request Access** view. |

21.




*Confirm in the **Request Access** tab view the Requested Change Date, the Requesting Department Access number(s) and the security access items checked in the General User section.*

*Notice the employee cannot modify this, only the Requestor/Submitter may make modifications.*

*The Employee will Approve, Send Back or Deny.*

***1.*** *Click on the **Approve** button, to approve this requested security access. This will display the **PeopleSoft Statement of User Responsibility** view shown on the next page (step 22)*

*OR*

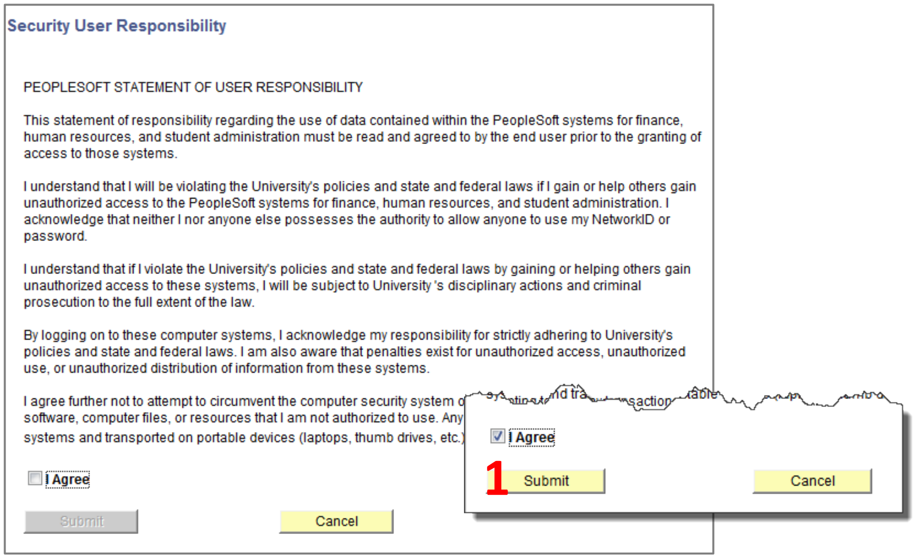
***2.*** *Click on the **Send Back** button, to ask for a change to the Requested Access.*

*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.*

22.





Once the employee selects **Approve,** the employee will immediately be prompted to read and agree to **the PeopleSoft Statement of User Responsibility**.

*1. Check the* **I Agree** *box and click the* **Submit** *button.*

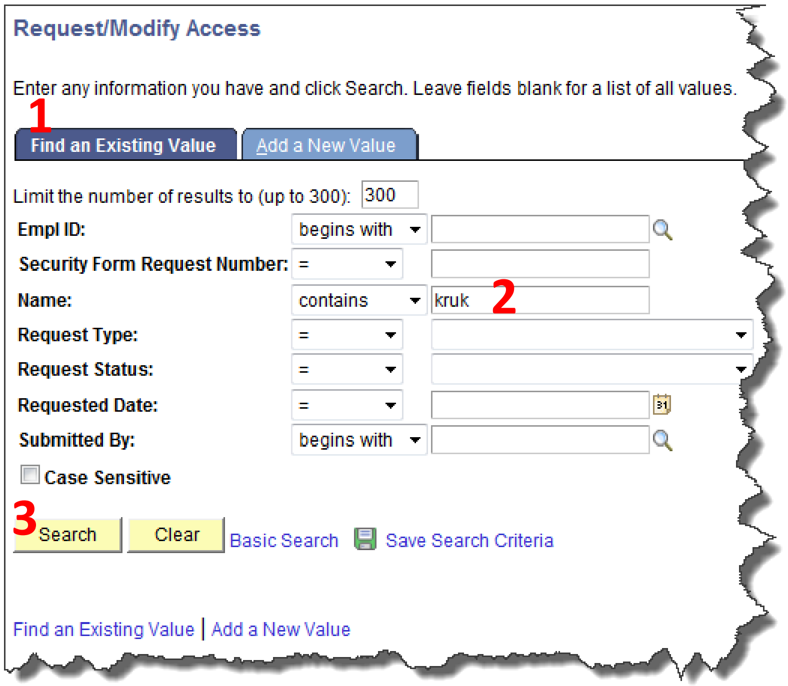
Since this step began with the **Approve Access** link, you will return to the Approve Access work list (as shown on the left) with links for more approvals or no forms to approve.

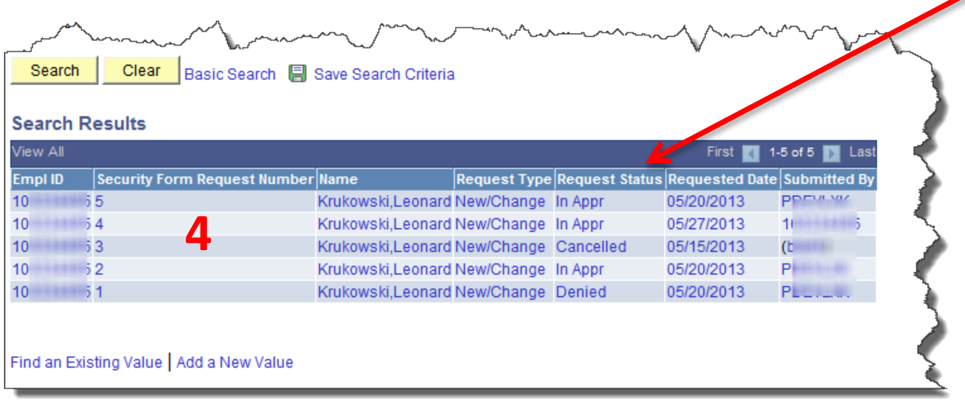
Just as it is when the Employee submits the request, the Request Status changes from "Request" to "In Approval Process", and the MABM Approver is notified by email that the requested security transaction is in their workflow ready for approval.

The Employee may now monitor the approval process by returning to the **Request/Modify Access** link and selecting the **Find an Existing Value** tab.

See the next step "How to view the workflow & existing security access".

23.




## How to view the workflow & existing security access.

Use the following steps to locate the **Request Access** workflow status or to find the **Existing Access** values for an employee:

1. *In the **Request/Modify Access** view select the tab **Find an Existing Value**.*

2. *Enter into any of the fields (Empl ID, Name, etc.) a value to narrow your search results.*

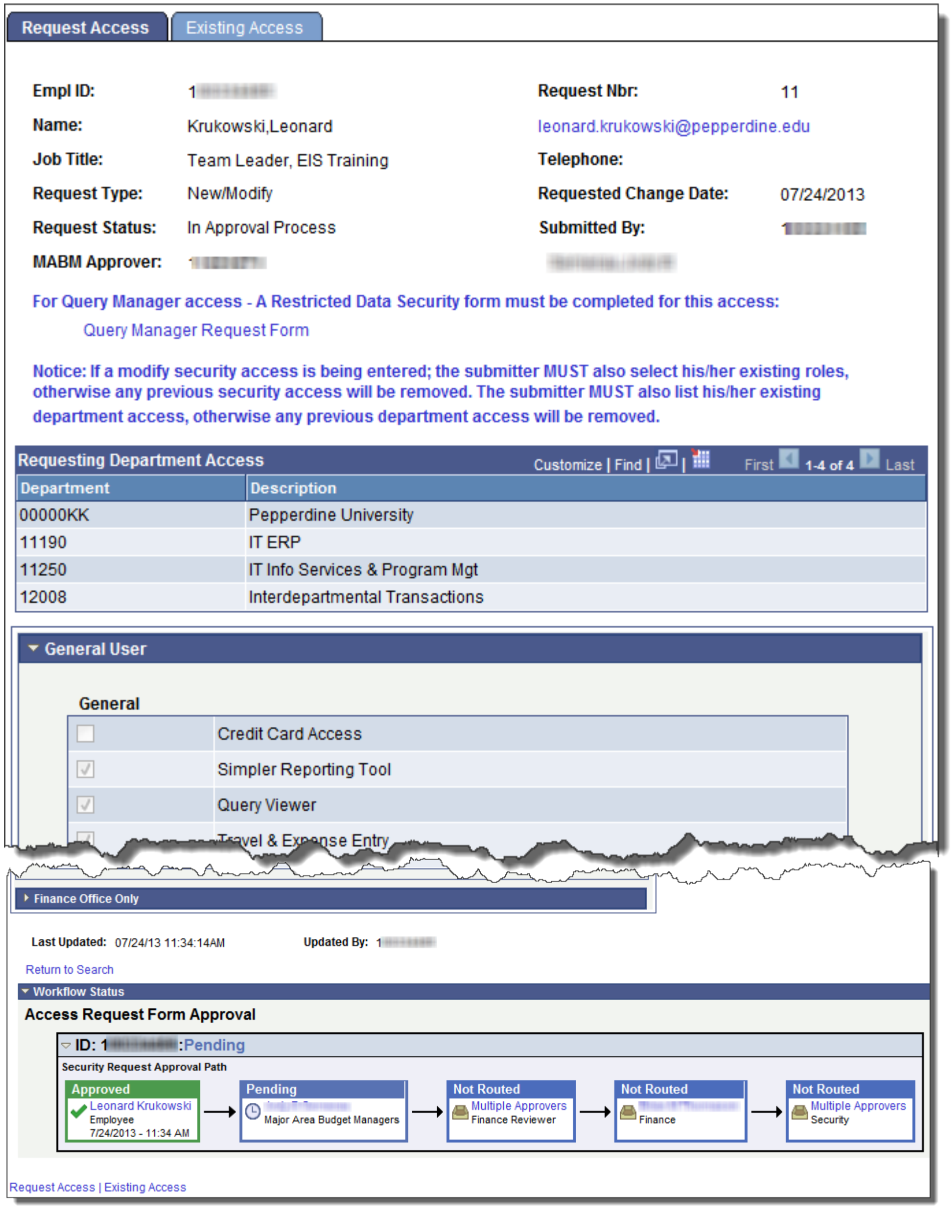
3. *Click the Search button*

4. *View the Search results and click anywhere on anyone of the requests where you wish to view the workflow status.*

Note the possible **Request Status** types:

- **Request** - the employee or requestor has started a security request and has saved it for later.
- **Submitted** - a requestor has submitted a security access request and it is pending approval by the employee.
- **In Approval** - in the workflow approval path beginning with the MABM, ending with IT Security.
- **Approved** - an employee or requestor security request has been approved.
- **Cancelled** - an employee or requestor has cancelled the security request.
- **Denied** - any one of the approvers has denied the security request.

24.



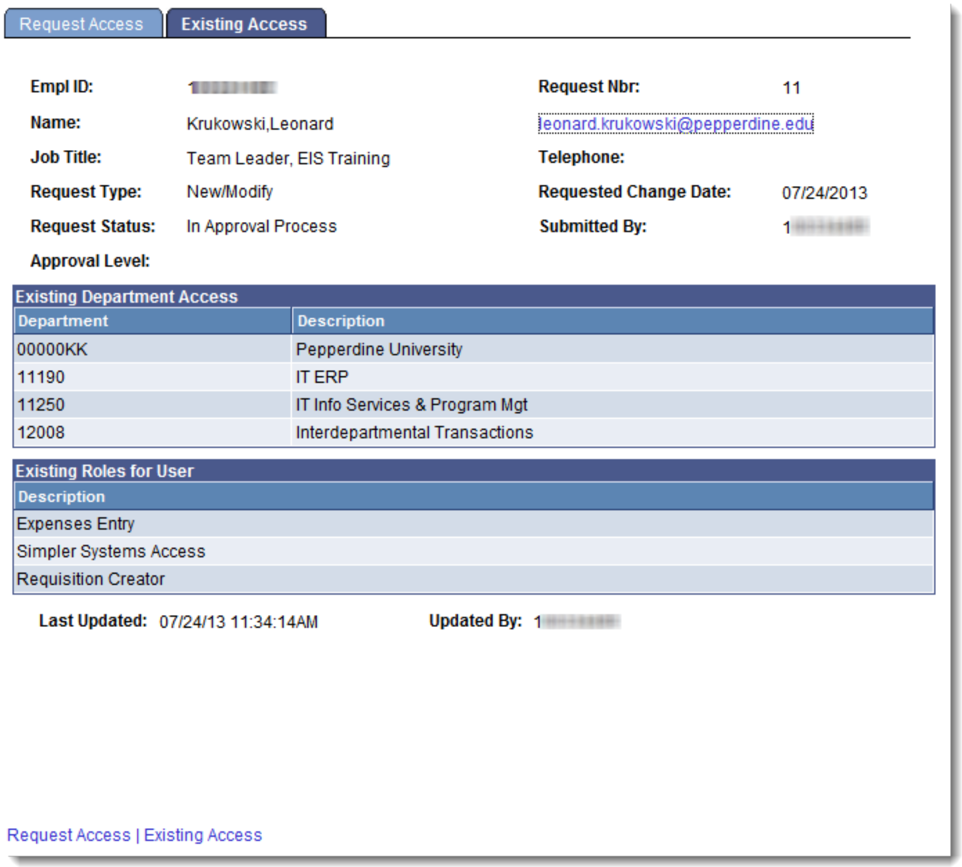

This view displays the **Request Access** Workflow Status.

In the example shown to the left, the employee has approved the requested security access. The Request Status is “In Approval Process”, and an email has been sent to the MABM Approver.

Note: Emails are generated for each step of the approval process notifying the next approver of the pending approval. The employee receives an email when the workflow is initiated and when final approval comes from IT Security.

The Workflow Status may be viewed at any time by anyone who has access to the **Finance Access Forms.**

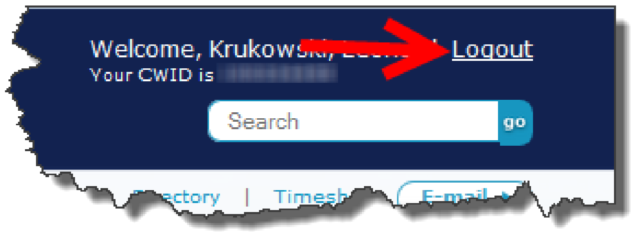
25.




The **Existing Access** tab will provide a read only view of the current security access.

The **Existing Department Access** fields will get populated at the time of request submission. If the request was not submitted, current department access for the user will be displayed.

The **Existing Roles for User** gets populated at the time of request submission. If the request was not submitted, current roles for the user will be displayed.

| | | |
|---|---|---|
| 26. |  | Upon completion of your Request or Modify Access actions, or viewing existing security, you may wish to navigate back to the WaveNet home page or if finished, Logout of WaveNet.<br><br>For information on how to **Approve Access**, see the PeopleSoft Finance **Approve Access Training Guide**<br><br>For information on how to **View Existing Access** see the PeopleSoft Finance **View Existing Access Training Guide** |
| | | |
| 27. | | For questions regarding the Finance Access Forms process or comments/suggestions regarding this document or … please call or email:<br><br>Len Krukowski: x6807<br>Leonard.Krukowski@Pepperdine.edu |