Peoplesoft (ERP) Finance Access Request Form User Guide

Last Revised: 11/27/13

REVISION CONTROL

Document Title:	PeopleSoft ERP Finance Access Request Form User Guide
Author:	IT Training & Support
File Reference:	FinanceARF_SecurityBPG.docx

Revision History

Revision Date	Revised By	Summary of Revisions	Section(s) Revised
1/18/11	Lori Arthur	Updated guide to reflect new Finance ARF changes.	Click here to enter Revision Date
2/17/11	Lori Arthur	Updated guide to reflect new mechanism for choosing Approvers.	
3/22/11	Lori Arthur	Updated guide to reflect updated reports available for distributed users.	
5/3/13	Lori Arthur-Carmichael	Updated guide to reflect that paper ARFs are no longer accepted. Made ATI formatting changes.	
11/27/13	Lori Arthur-Carmichael	Revised guide to reflect changes made to form related to Finance DOA form.	

Review / Approval History

Review Date	Reviewed By	Action (Reviewed, Recommended or Approved)
1/18/11	May Wong, Kerry Boyer, Joe Luzzi	Approved
2/17/11	May Wong, Kerry Boyer, Joe Luzzi	Approved
3/22/11	May Wong, Kerry Boyer, Joe Luzzi	Approved
5/3/13	May Wong, Kerry Boyer, Joe Luzzi	Approved
11/27/13	May Wong, Kerry Boyer, Joe Luzzi	Approved

Table of Contents   Page

1.0   Access Request Form Overview

In order to access any PeopleSoft functionality campus users must complete a PeopleSoft (ERP) Access Request Form. These forms are available online through the campus portal. A separate form is required for each of the following functional areas: Human Resources, Finance, and Student Administration. ***Prior to accessing the form all popup blockers must be disabled.***

Who completes the ARF?
An Access Request Form can be initiated either by an individual employee or another person within the division.

When is the access granted?
Once the manager electronically approves the ARF, IT Training will assign the necessary training courses. <u>All training requirements</u> must be completed before <u>any</u> access to PeopleSoft is granted.
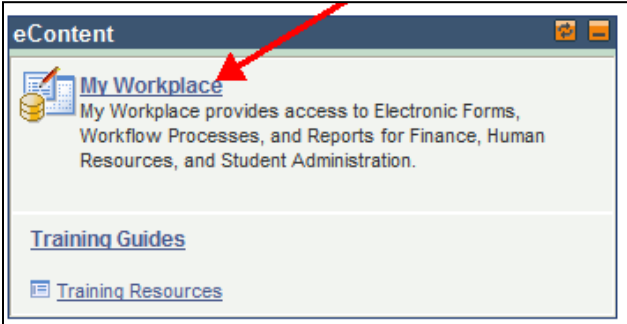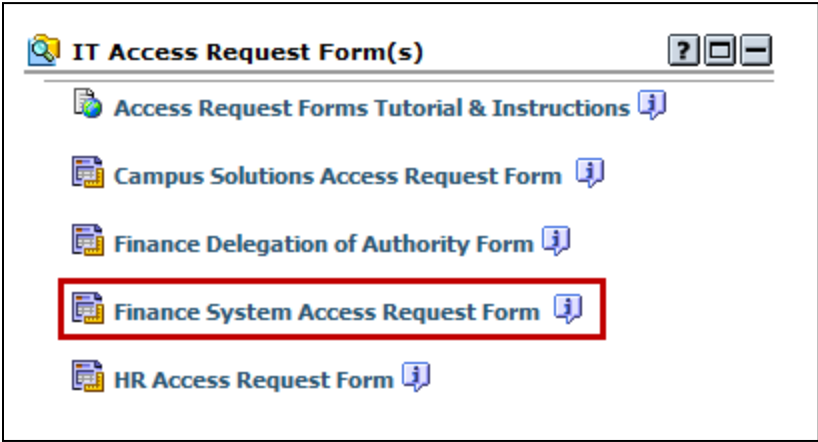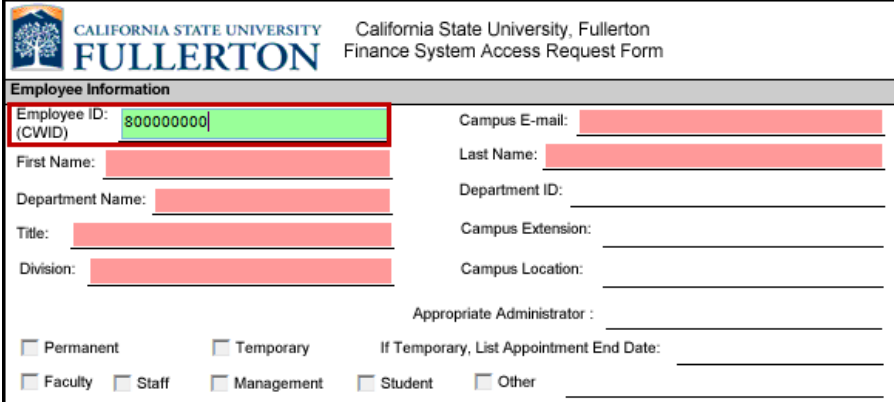
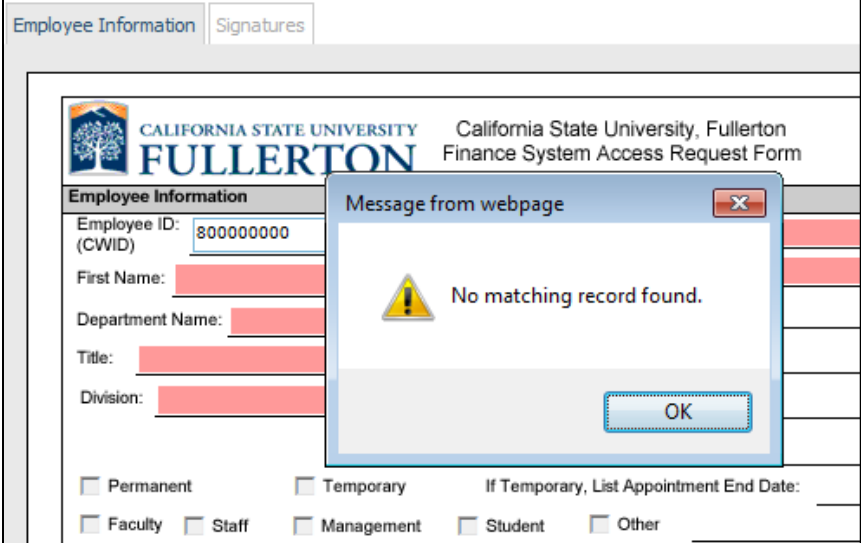Please use the appropriate browser to successfully access the web based access request form:
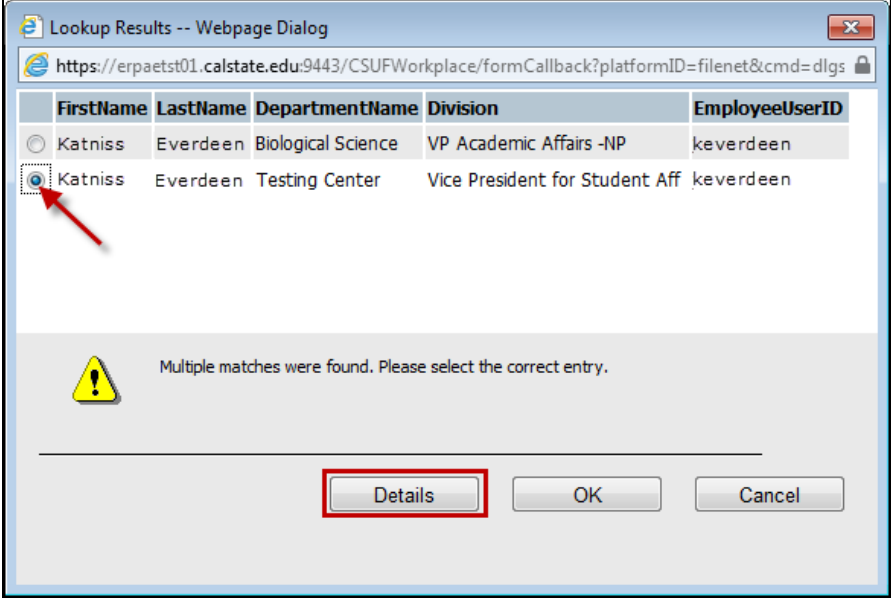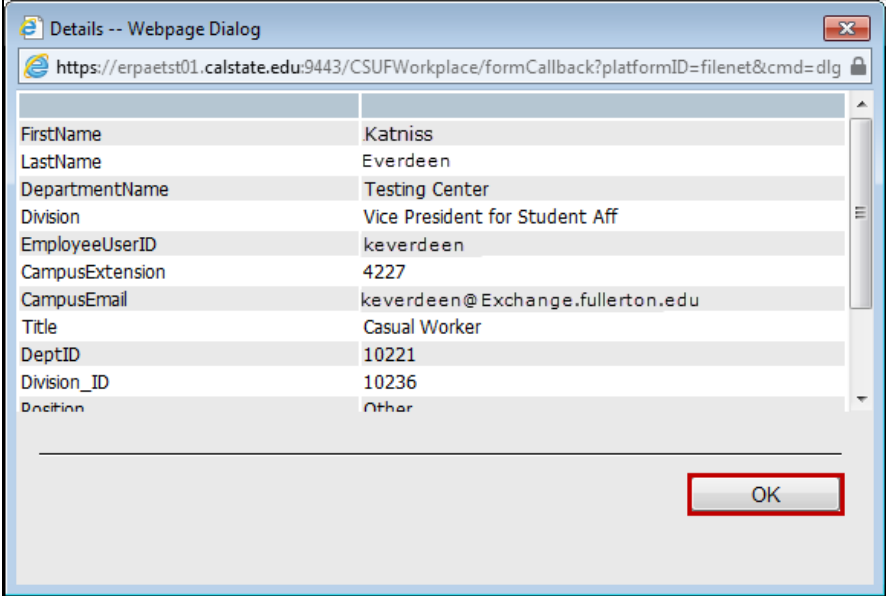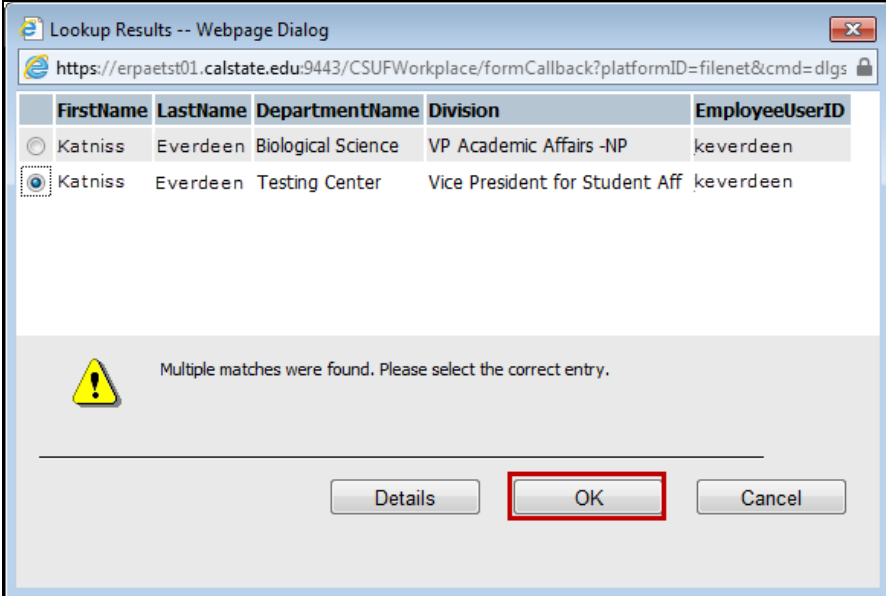
- PC – use Internet Explorer
- MAC – use Safari

2.0 Access Request Form (ARF) Data Entry for Finance

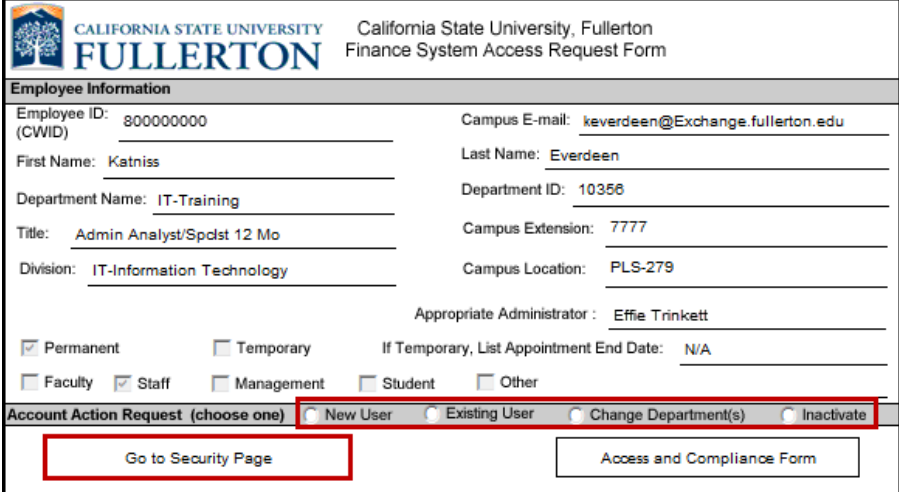To begin the process, first create a new Finance Access Request Form.

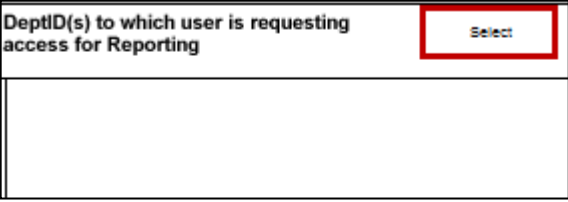| Processing Steps	Screen Shots
Step 1: Log into the campus portal. Enter your campus username and password. Then, click **Login**.	
Step 2: Next, select the **Titan Online** tab.	
Step 3: Next, select **My Workplace** under the eContent section.	
Step 4: Depending upon your access you may see additional forms and reports. To access the Access Request Form, select the **IT Access Request Form** link.	

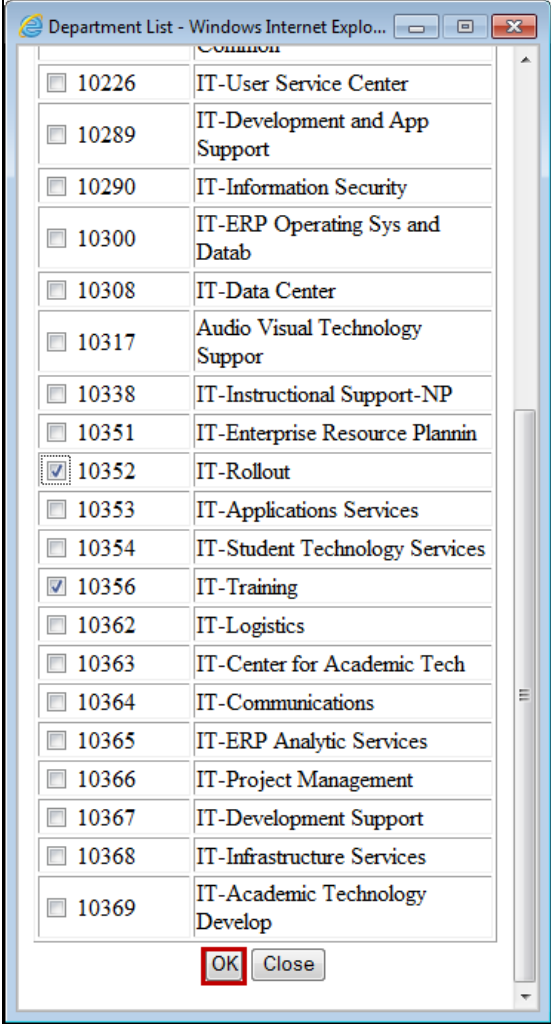| Processing Steps	Screen Shots
Step 5: Next, select the appropriate form for the required access: • Finance System Access Request Form ⚠️*Prior to accessing the form all popup blockers must be disabled.*	
Step 6: The form opens in a new window. First, enter the Employee ID (CWID). Then, tab to the next field. Additional fields on the page will auto populate. 📝 Fields in green should be completed first. This will auto populate other fields on the form with PeopleSoft data. 🛑 Verify that the employee's Appropriate Administrator is correct since this form will automatically be routed to that person for approval. 📝 If the form populates with incorrect personal data, contact Human Resources and close the form without continuing. This form should not be used until that data has been corrected.	

Processing Steps	Screen Shots
Step 6a: If the CWID is not listed in PeopleSoft an error message will pop up indicating "no matching record found." Contact CMS Security at cmssecurity@fullerton.edu with the employee's name and CWID if you get this error message. Security personnel will assist you in getting the user added to the system.	
Step 6b: If the employee has multiple jobs on campus you will be prompted to choose the appropriate position for the form. To review the position information, select a position and click **Details**.	

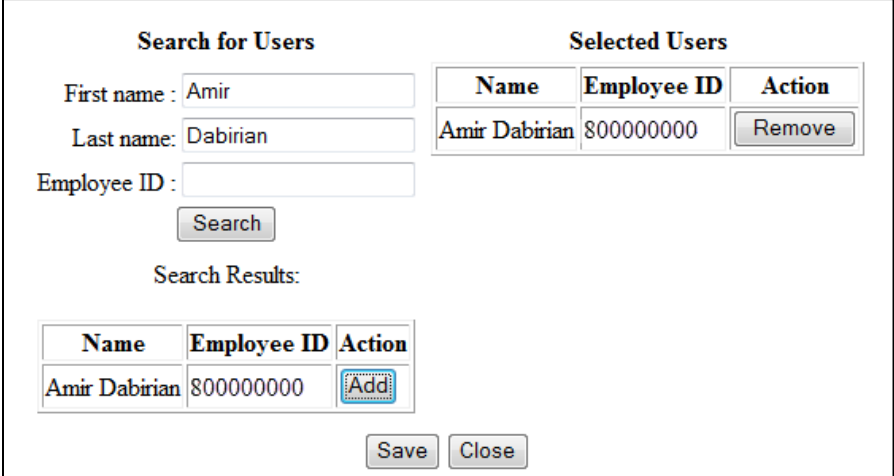| Processing Steps	Screen Shots
Step 6c: The job details will be displayed. Select **OK** to return to the position selection screen.	*Details -- Webpage Dialog* https://erpaetst01.**calstate.edu**:9443/CSUFWorkplace/formCallback?platformID=filenet&cmd=dlg FirstName — Katniss LastName — Everdeen DepartmentName — Testing Center Division — Vice President for Student Aff EmployeeUserID — keverdeen CampusExtension — 4227 CampusEmail — keverdeen@Exchange.fullerton.edu Title — Casual Worker DeptID — 10221 Division_ID — 10236 Position — Other OK
Step 6d: When the correct position has been identified, select the position and click **OK** to continue.	*Lookup Results -- Webpage Dialog* https://erpaetst01.**calstate.edu**:9443/CSUFWorkplace/formCallback?platformID=filenet&cmd=dlgs **FirstName LastName DepartmentName Division EmployeeUserID** ○ Katniss Everdeen Biological Science VP Academic Affairs -NP keverdeen ◉ Katniss Everdeen Testing Center Vice President for Student Aff keverdeen ⚠ Multiple matches were found. Please select the correct entry. Details	OK	Cancel

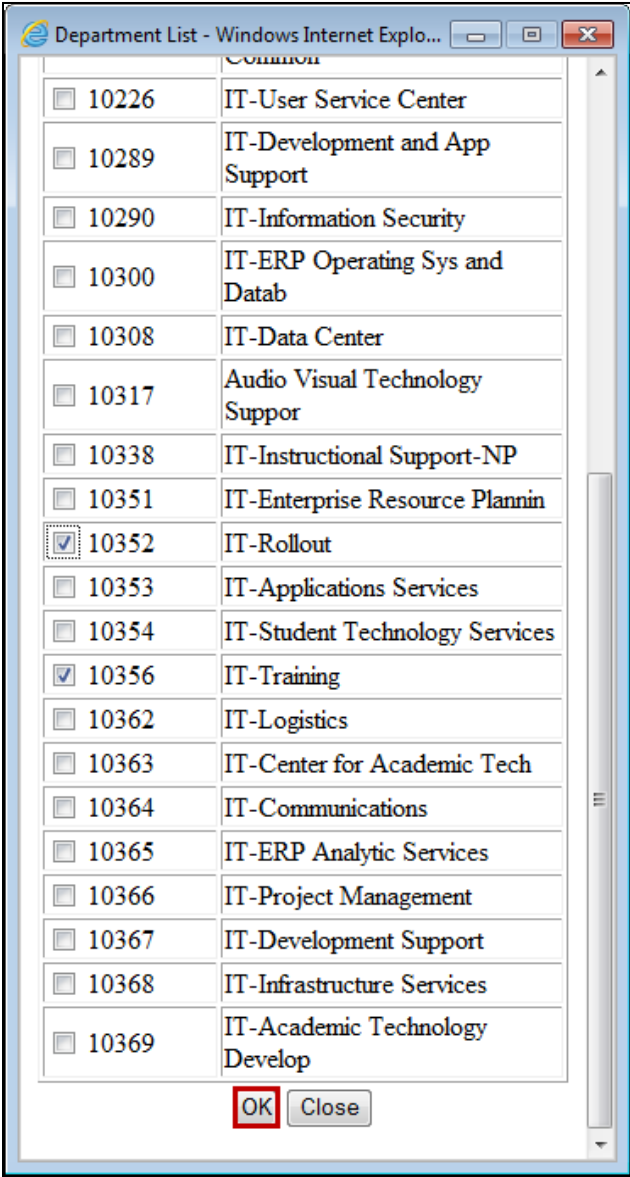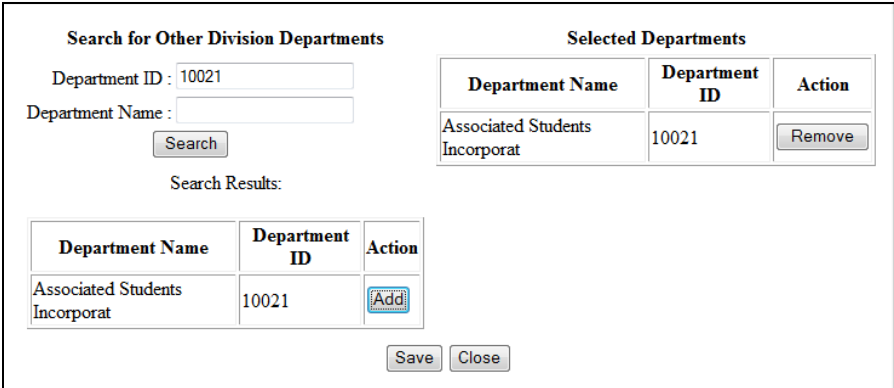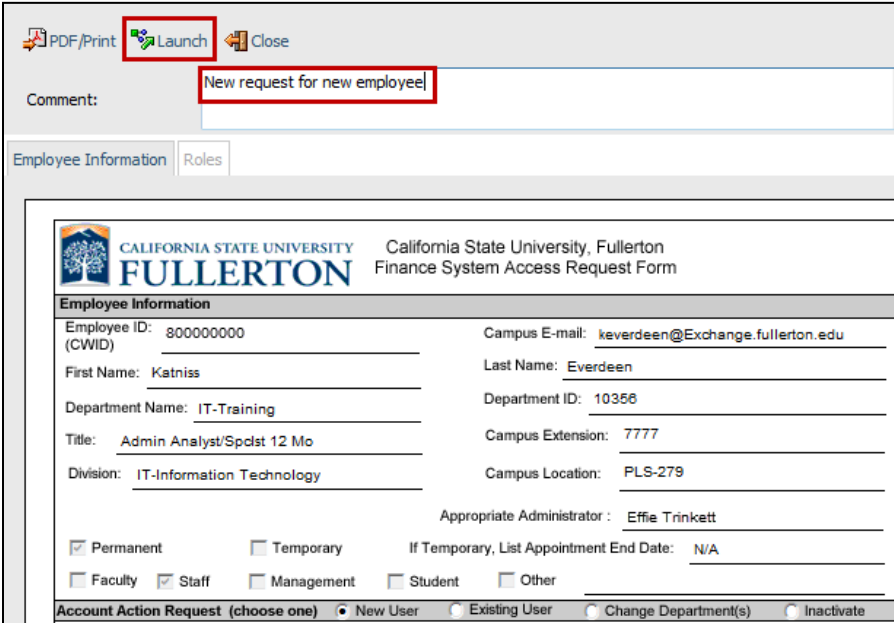| Processing Steps	Screen Shots
Step 7: Next, identify the action request: • **New User**: a user who does not currently have Finance access. • **Existing User**: a user whose Finance access needs to be modified. • **Change Department**: a user who has moved from one department to another and their Finance access needs to be modified. • **Inactivate**: a user whose purchase requisition approval authority and access needs to be deactivated. Then click on the **Go to Security Page** button.	
Step 8: Select the type of access: • **Distributed User**: a user who works in a campus department. • **Central User**: a user who works in a Finance department such as Budget Operations, Accounts Payable, Contracts & Procurement, Travel Operations, etc. 📝 Central Users may submit ARFs for distributed access (i.e. the ability to submit purchase requisitions on behalf of their department). When doing so, they should select Distributed User.	

Processing Steps	Screen Shots
Step 9: Based upon the type of access selected, the appropriate columns become available. Select the **Add** box next to each role needed. If necessary, you can also remove any roles no longer required by choosing the **Remove** box next to the role. To review role descriptions, click the Role Description Reference (R) icon. Please note that when Purchase Requisition Approval is selected, you must fill out the DOA for Requisition section at the bottom of the form (see Step 12)	 **CALIFORNIA STATE UNIVERSITY** **FULLERTON** California State University, Fullerton Finance System Access Request Form Type of Access: ☑ Distributed User ☐ Central User **Finance Distributed Roles** *Role Description Reference -> R* **Add Remove** **Add Remove** ☐ ☐ Purchase Requisition Data Entry ☐ ☐ Purchase Requisition Approval ☐ ☐ Revenue/Expense Reports Purchasing Reports ☐ Other My Queries
Step 10: If you are requesting access to Reports, click **Select** to indicate for which department ID(s) you are requesting report access.	DeptID(s) to which user is requesting access for Reporting Select

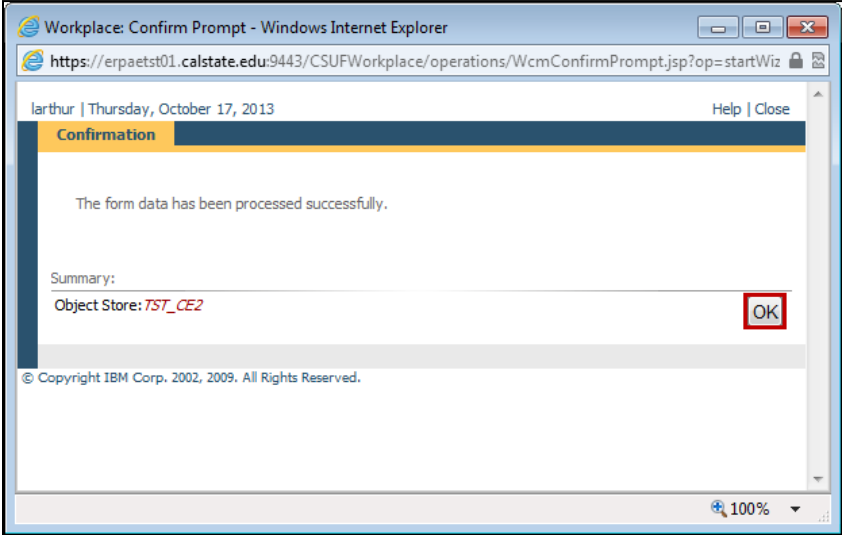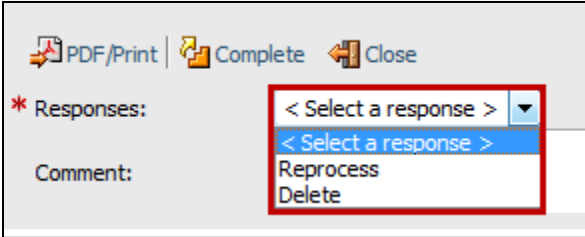| Processing Steps	Screen Shots
Step 10a: Only the Department IDs for the identified division are listed. Choose the appropriate department(s) and click **OK**.	Department List - Windows Internet Explo... Common ☐ 10226 IT-User Service Center ☐ 10289 IT-Development and App Support ☐ 10290 IT-Information Security ☐ 10300 IT-ERP Operating Sys and Datab ☐ 10308 IT-Data Center ☐ 10317 Audio Visual Technology Suppor ☐ 10338 IT-Instructional Support-NP ☐ 10351 IT-Enterprise Resource Plannin ☑ 10352 IT-Rollout ☐ 10353 IT-Applications Services ☐ 10354 IT-Student Technology Services ☑ 10356 IT-Training ☐ 10362 IT-Logistics ☐ 10363 IT-Center for Academic Tech ☐ 10364 IT-Communications ☐ 10365 IT-ERP Analytic Services ☐ 10366 IT-Project Management ☐ 10367 IT-Development Support ☐ 10368 IT-Infrastructure Services ☐ 10369 IT-Academic Technology Develop [OK] [Close]

Processing Steps	Screen Shots
Step 11: Identify Requisition Requesters & Approvers If you selected "Purchase Requisition Data Entry" or "Purchase Requisition Approval" in the Finance Distributed Roles section, click the **Select** button to identify the appropriate Requisition Approver(s) or Requisition Requester(s). 📝 If you selected "Requisition Data Entry," you will be identifying the Requisition approver(s) who can approve requisitions for this user. If you selected "Requisition Approval," you will be identifying the Requisition Requester(s) for whom this user will approve requisitions.	Approvers for Requisition Data Entry only Select Requestors for Requisition Approval only Select
Step 11a: If you selected "Purchase Requisition Data Entry," a list of all Requisition Approvers for the user's division will appear in a new window. Place a check mark next to each Requisition Approver who should be able to approve this user's requisitions. Click **OK**. ⚠️ If the Requisition Approver does not appear on this list, please contact CMS Security. It may be that the appropriate paperwork has not been submitted to set up the Requisition Approver.	**Select Requisition Approver(s)** ☐ Kenara Ly ☐ Pamela Drummond ☐ Marci Payne ☐ Wei-Cheng Peng ☐ Afsaneh Tosinejad Hamedani ☐ Rommel Hidalgo ☐ Paul Levesque ☐ Joseph Luzzi ☑ Michael Marcinkevicz ☐ Amir Dabirian ☑ Chris Manriquez ☐ Kerry Boyer ☐ Leah Brew OK Close

Processing Steps	Screen Shots
Step 11b: If you selected "Purchase Requisition Approval," a search page will open in a new window. Enter search criteria to find the user(s) that you wish to add. When a search result appears, click **Add** to add the user to the Selected Users list on the right. Click **Remove** next to a user in the Selected Users list to remove them. Click **Save** when you are finished adding users. You will only be able to select users who have requisition requester access and who are in the same division as specified in the Employee Information section.	**Search for Users** **Selected Users** First name : Amir Last name: Dabirian Employee ID : Search Selected Users table: Name: Amir Dabirian, Employee ID: 800000000, Action: Remove Search Results: Name: Amir Dabirian, Employee ID: 800000000, Action: Add Save Close
Step 12: DOA for Requisition Approver Only If you selected "Purchase Requisition Approval" you will need to fill out the DOA for Requisition Approver section. First, indicate the effective date.	Effective Date: 10/13/2013
Step 12a: Next, indicate if the authority is permanent or temporary. If the authority is temporary, indicate the end date.	☐ Permanent ☑ Temporary If Temporary, List End Date: 06/30/2014

Processing Steps	Screen Shots
Step 12b: Click on **Select Division Departments** to indicate to which department(s) this user has purchase requisition approval authority.	Select Division Depts Departments
Step 12c: Only the Department IDs for the identified division are listed. Choose the appropriate department(s) and click **OK**.	Department List - Windows Internet Explo... Common ☐ 10226 IT-User Service Center ☐ 10289 IT-Development and App Support ☐ 10290 IT-Information Security ☐ 10300 IT-ERP Operating Sys and Datab ☐ 10308 IT-Data Center ☐ 10317 Audio Visual Technology Suppor ☐ 10338 IT-Instructional Support-NP ☐ 10351 IT-Enterprise Resource Plannin ☑ 10352 IT-Rollout ☐ 10353 IT-Applications Services ☐ 10354 IT-Student Technology Services ☑ 10356 IT-Training ☐ 10362 IT-Logistics ☐ 10363 IT-Center for Academic Tech ☐ 10364 IT-Communications ☐ 10365 IT-ERP Analytic Services ☐ 10366 IT-Project Management ☐ 10367 IT-Development Support ☐ 10368 IT-Infrastructure Services ☐ 10369 IT-Academic Technology Develop OK Close

Processing Steps	Screen Shots
Step 12d (optional): If this user has purchase requisition approval authority for departments in another division on campus, click **Select Other Division Depts**.	
Step 12e: Enter search criteria to find the department(s) that you wish to add. When a search result appears, click **Add** to add the department to the Selected Departments list on the right. Click **Remove** next to a department in the Selected Departments list to remove them. Click **Save** when you are finished adding departments.	
Step 13: If necessary, add any comments in the 'Comment' field. Then, click the **Launch** button to complete processing of the form.	
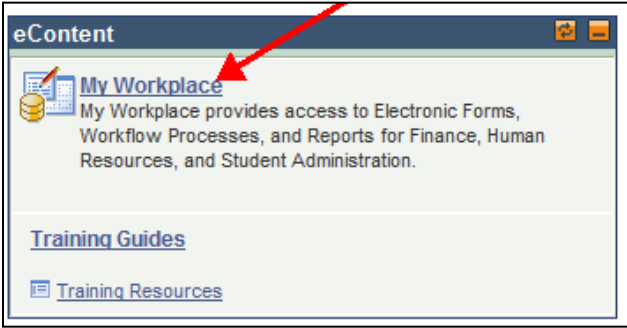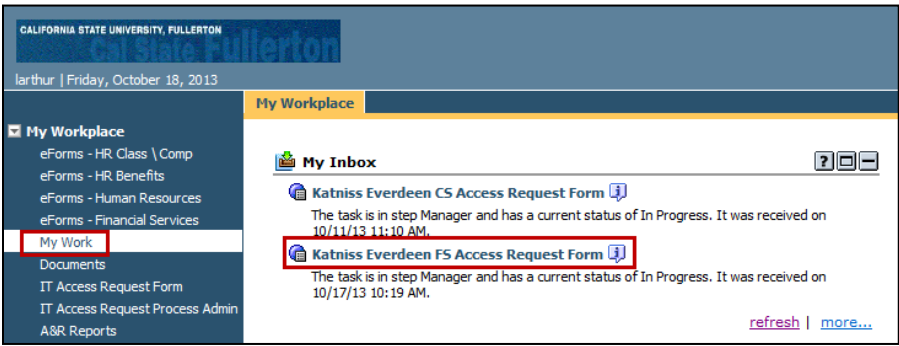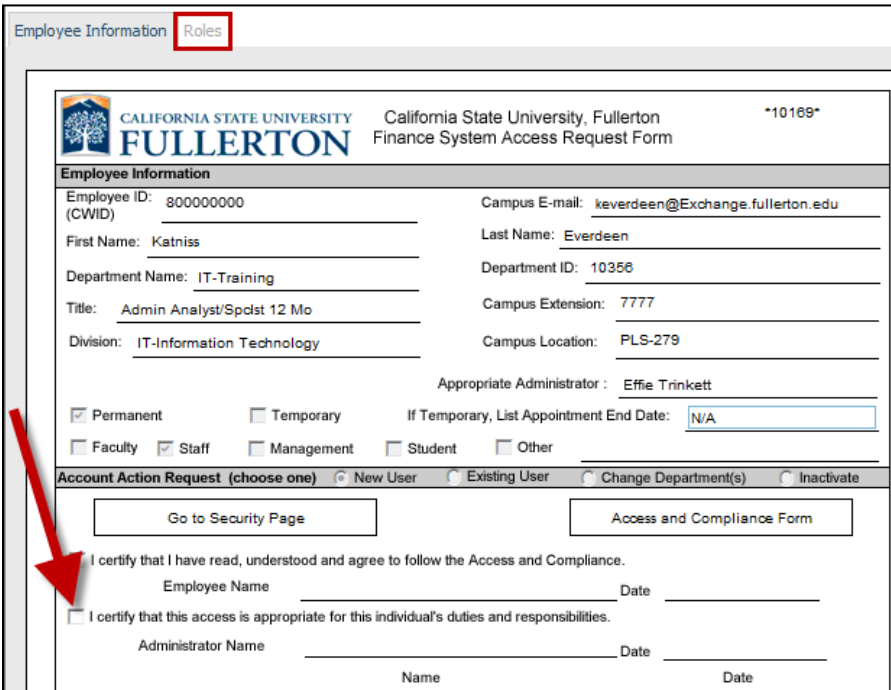
Processing Steps	Screen Shots
Step 14: The form is now complete. The appropriate manager is notified via email to electronically approve the access request form. Once routed to the manager, changes cannot be made to the form; however, the manager can reject the form and it will be routed back to the initiator.	
Rejected Form: If the form is rejected and returned to the initiator: • The initiator can update and reprocess the form • The initiator can delete the form and start over.	

3.0   Manager Approval Process
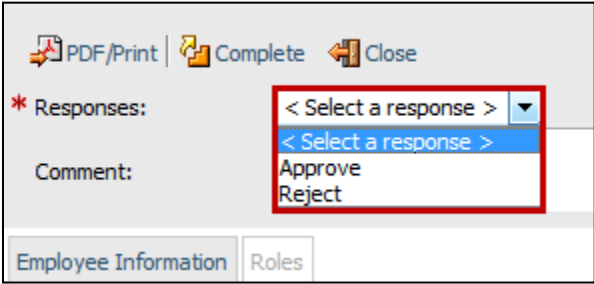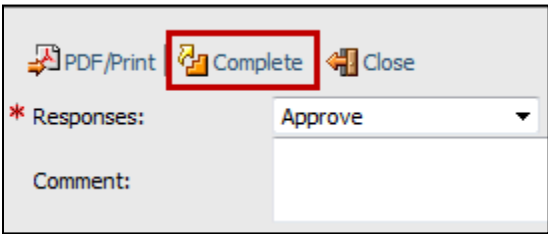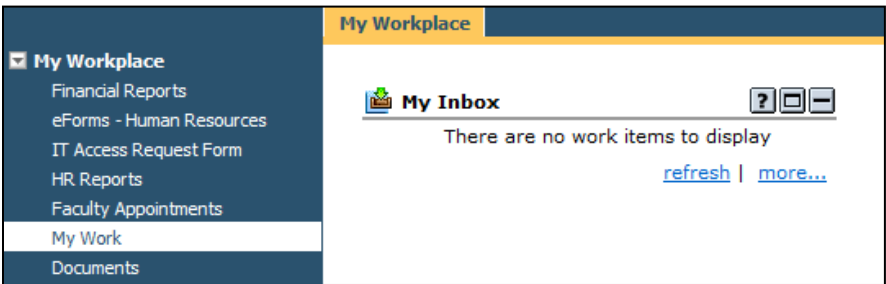
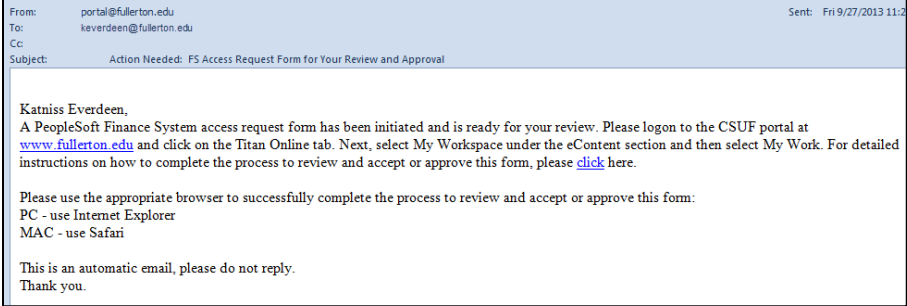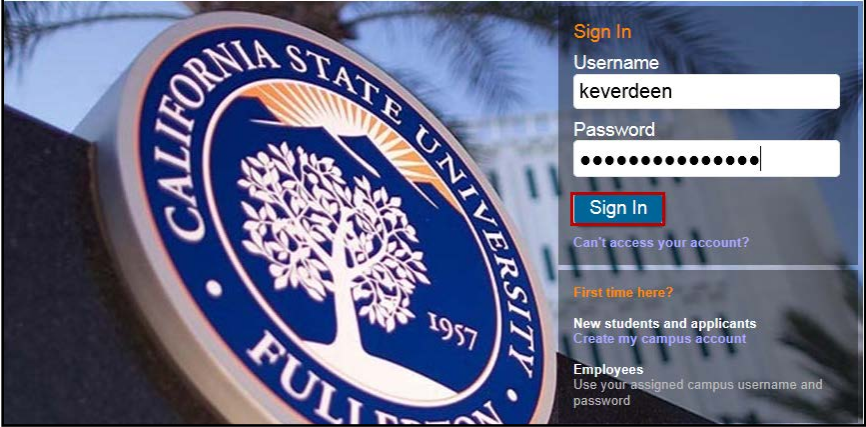Once a form is complete the appropriate manager is notified via email to review the Access Request Form (ARF).

Processing Steps	Screen Shots
Step 1: The appropriate manager receives an email to review the Access Request form electronically.	From: portal@fullerton.edu Sent: Fri 9/27/2013 10:11 To: etrinkett@fullerton.edu Cc: Subject: Action Needed: FS Access Request Form for Your Review and Approval Effie Trinkett, A PeopleSoft Finance System access request form for Katniss Everdeen has been initiated and is ready for your review and approval. Please logon to the CSUF portal at www.fullerton.edu and click on the Titan Online tab. Next, select My Workspace under the eContent section and then Select My Work. For additional detailed instructions on how to complete the process to review and accept or approve this form, please click here. Please use the appropriate browser to successfully complete the process to review and accept or approve this form: PC - use Internet Explorer MAC - use Safari This is an automatic email, please do not reply. Thank you.
Step 2: Log into the campus portal. Enter your campus username and password. Then, click **Login**.	
Step 3: Next, select the **Titan Online** tab.	

Processing Steps	Screen Shots
Step 4: Next, select **My Workplace** under the eContent section.	
Step 5: Then select **My Work.** The pending Access Request form will appear. Click on the form you want to review.	
Step 6: Review the access request form; be sure to click on the **Roles** tab to view the requested access. On the Employee Information page, certify that the access is appropriate.	

Processing Steps	Screen Shots
Step 7: Next, select either **Approve** or **Reject** from the Responses drop-down menu. 📝 If the request is rejected it will return to the form initiator.	
Step 8: Once the response is selected, click the **Complete** button. Note: • If the request is rejected it will return to the form initiator. • If the request is approved the form will move to the next appropriate party for processing. 📝 If the request is approved by the ISO admin office, the manager will be notified via email.	
Step 9: The Access Request form is approved and removed from the list of pending ARF's.	

4.0 Employee Review Process

The employee must review and accept the form electronically, even if the employee initiated the Access Request Form.

Processing Steps	Screen Shots
Step 1: Employee receives an email to review the Access Request form electronically.	
Step 2: Log into the campus portal. Enter your campus username and password. Then, click **Login**.	
Step 3: Next, select the **Titan Online** tab.	

Processing Steps	Screen Shots
Step 4: Next, select **My Workplace** under the eContent section.	
Step 5: Then select **My Work**. The pending Access Request form will appear. Click on the form you wish to electronically sign.	
Step 6: The Access Request form is displayed. Click on the **Roles** tab to review the access being requested. To approve the form, first click on the **Access and Compliance Form** button on the Employee Information tab. Then electronically sign the form by checking the statement "I certify that I have read, understood and agree to follow the Access and Compliance form."	

Processing Steps	Screen Shots
Step 7: Next, select either **Approve** or **Reject** from the Responses drop-down menu. You may also optionally enter a comment in the Comment field. If you reject the form, enter a comment to explain the rejection. If the employee rejects the access request form it is routed back to the appropriate administrator. If the appropriate administrator agrees, he/she can also reject the form. The rejected form is returned to the initiator.	PDF/Print | Complete Close * Responses: < Select a response > ▼ < Select a response > Accept Comment: Reject
Step 8: To complete the approval process, select the **Complete** link.	PDF/Print | Complete Close * Responses: Accept ▼ Comment:
Step 9: The Access Request form is approved and removed from the list of pending ARF's. The form is routed to the Division of Information Technology. The Access Request form cannot be changed once approved by the employee. Please contact the ISO security admin Pat Nelson for assistance. Once access has been granted, the employee will be notified by the ISO administrative office.	**My Workplace** ☑ **My Workplace** Financial Reports eForms - Human Resources IT Access Request Form HR Reports Faculty Appointments My Work Documents **My Inbox** ? ☐ ▬ There are no work items to display refresh | more...