



Division of
Information Technology

Training

PeopleSoft (ERP) Finance Access Request Form User Guide

Last Revised: 3/22/11

REVISION CONTROL

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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.	

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1/18/11	May Wong, Kerry Boyer, Joe Luzzi	Approved
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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. All training requirements must be completed before any access to PeopleSoft is granted.



To avoid delays in access due to significant training requirements it is recommended you submit a form for immediate access needs. Then, submit a separate form for lower priority access requests.


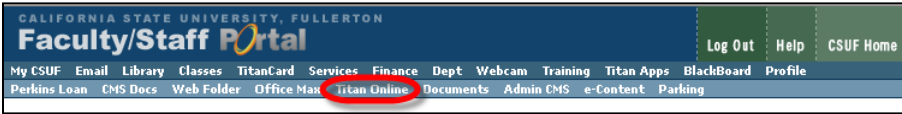
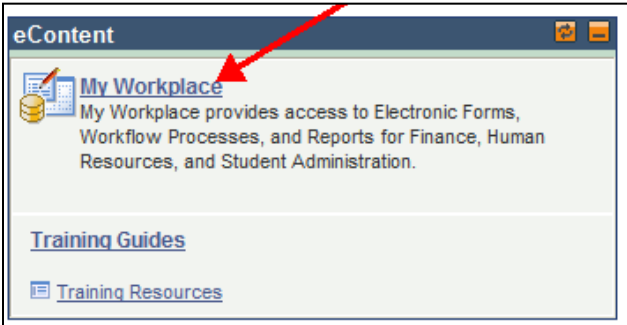
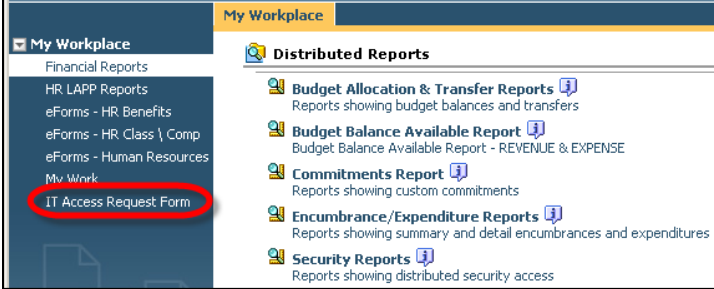
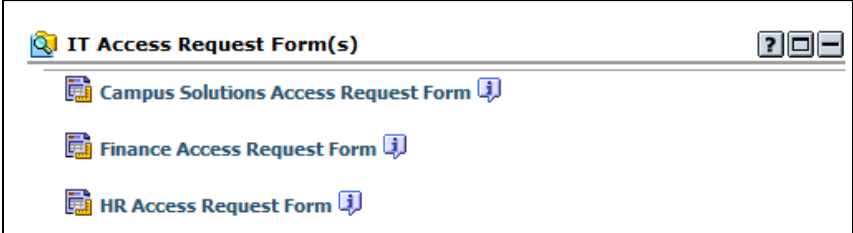





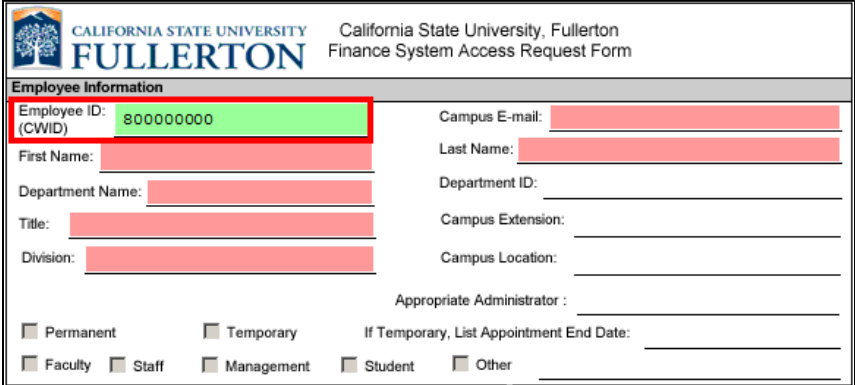
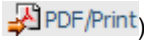


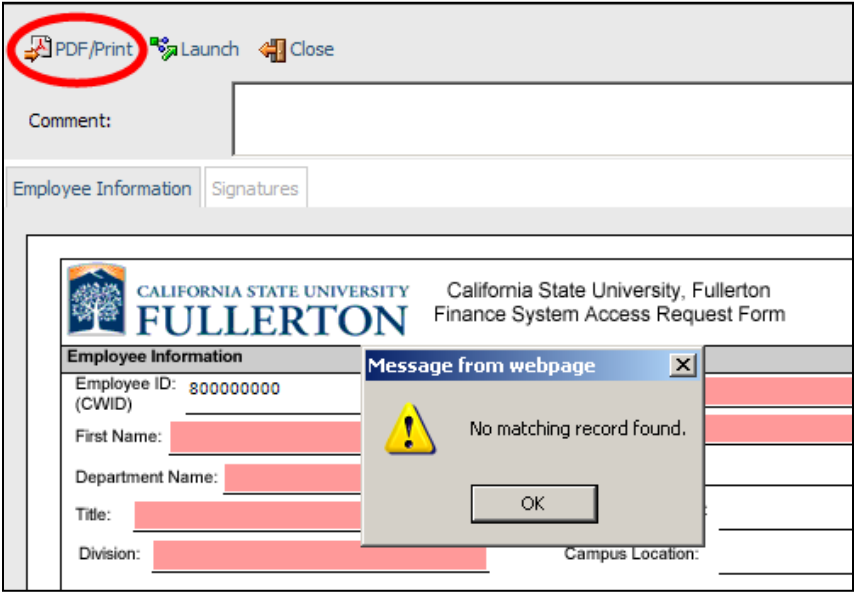
Please use the appropriate browser to successfully access the web based access request form:

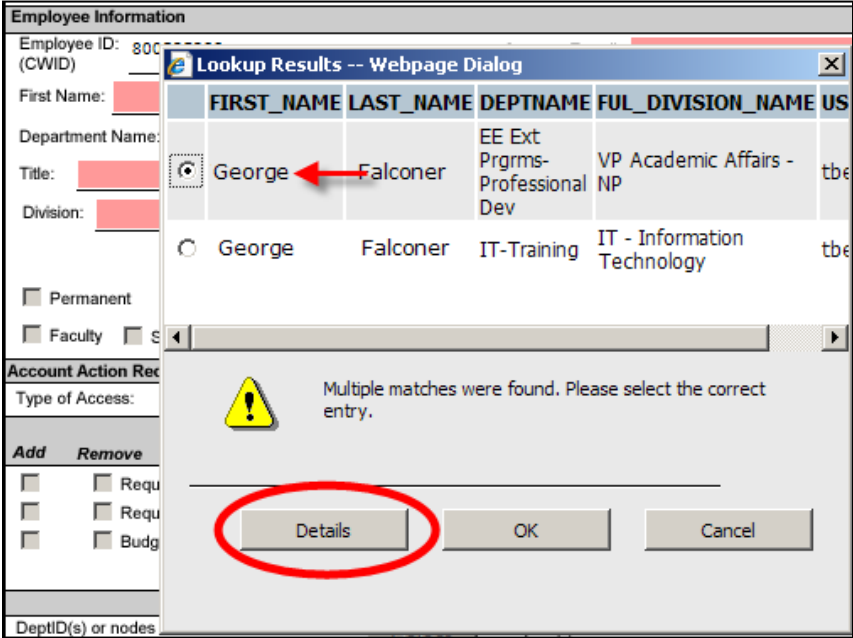
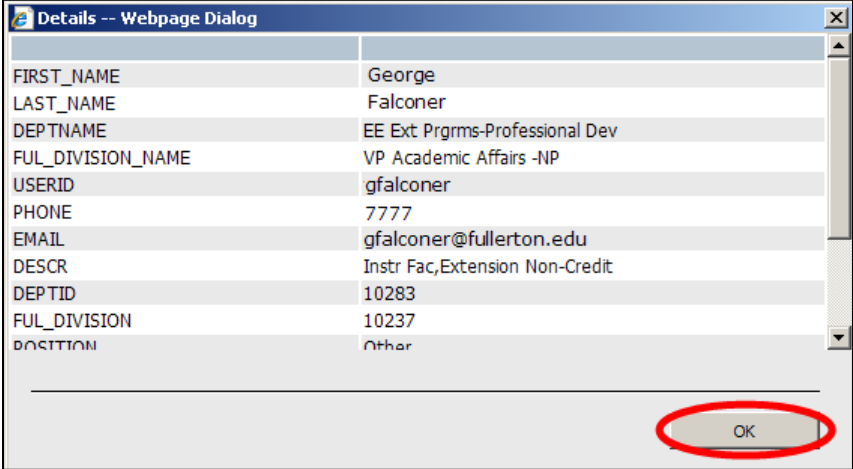
- PC – use Internet Explorer
- MAC – use Safari

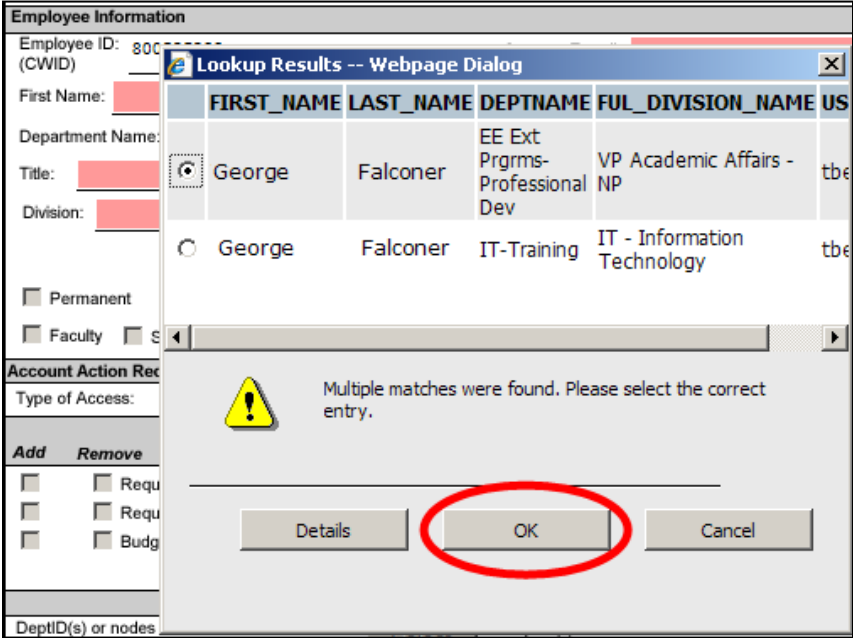

2.0 Access Request Form (ARF) Data Entry for Finance



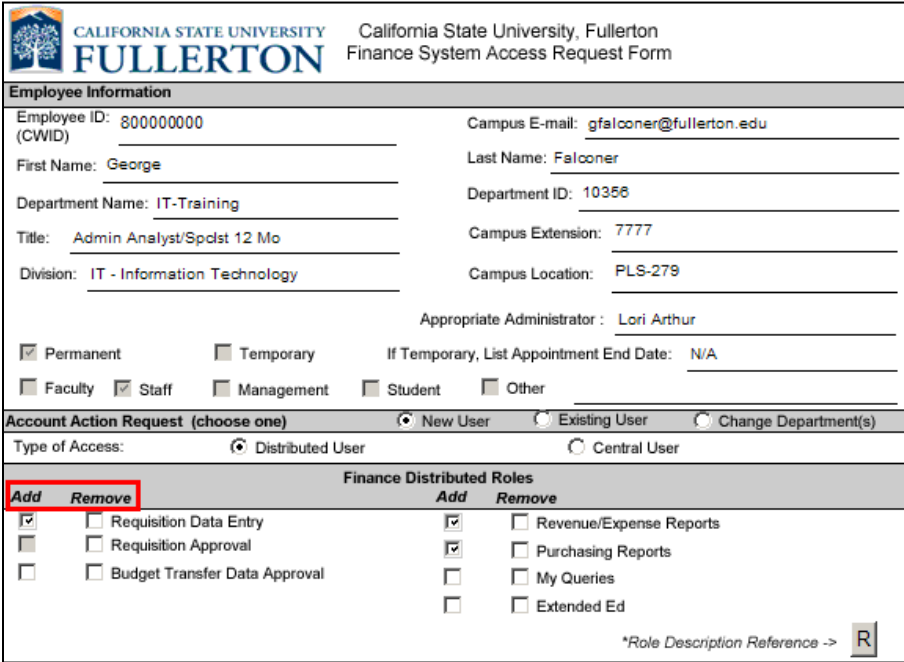
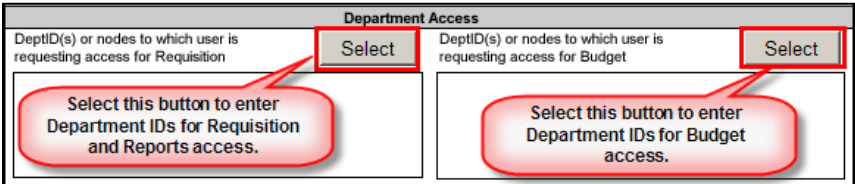
To begin the process, first create a new Finance Access Request Form.

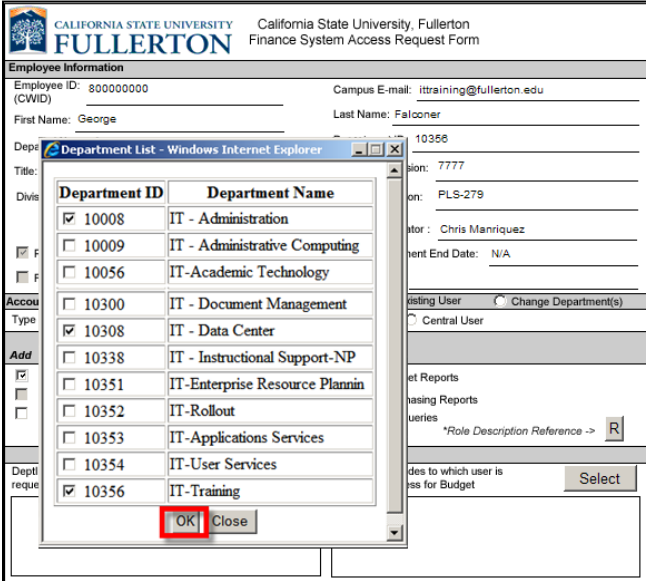
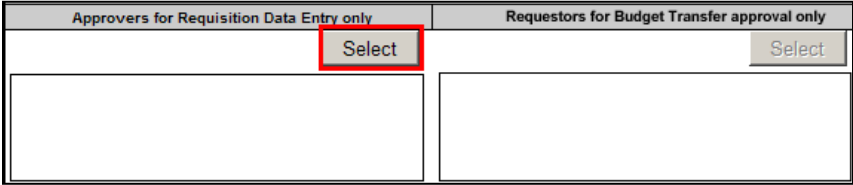

Processing Steps	Screen Shots
<p>Step 1: Log into the campus portal.</p> <p>Enter your campus username and password.</p> <p>Then, click Login.</p>	
<p>Step 2: Next, select the Titan Online tab.</p>	
<p>Step 3: Next, select My Workplace under the eContent section.</p>	
<p>Step 4: Depending upon your access you may see additional forms and reports.</p> <p>To access the Access Request Form, select the IT Access Request Form link.</p>	
<p>Step 5: Next, select the appropriate form for the required access:</p> <ul style="list-style-type: none"> • Finance Access Request Form 	


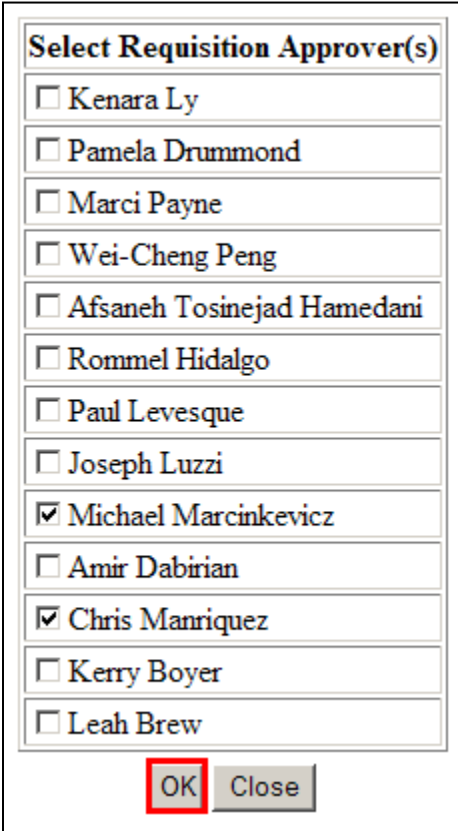

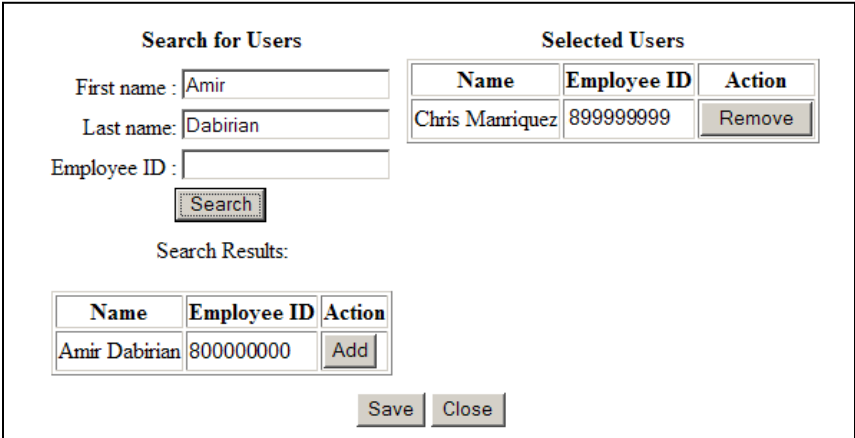
Processing Steps	Screen Shots
	 <i>Prior to accessing the form all popup blockers must be disabled.</i>
<p>Step 6: The form opens in a new window.</p> <p>First, enter the Employee ID (CWID).</p> <p>Then, tab to the next field. Additional fields on the page will auto populate.</p> <p> Fields in green should be completed first. This will auto populate other fields on the form with PeopleSoft data.</p> <p>The arrow keys () are only used in the ERP Campus Solutions Access Request Form.</p>	
<p>Step 6a: If the CWID is not listed in PeopleSoft an error message will pop up indicating “no matching record found.”</p> <p>To continue, select the PDF/Print () button and complete the form manually.</p> <p>Send the manually completed form to LH-700 Attn: Security.</p> <p> The Access Request Form must only be completed manually if an error occurs.</p> <p> If the form populates with incorrect personal data, contact Human Resources.</p>	 <p>Note - The manual process is required for the following:</p> <ul style="list-style-type: none"> - Student employees - Contractors - Temporary employees - Auxiliary - Etc.

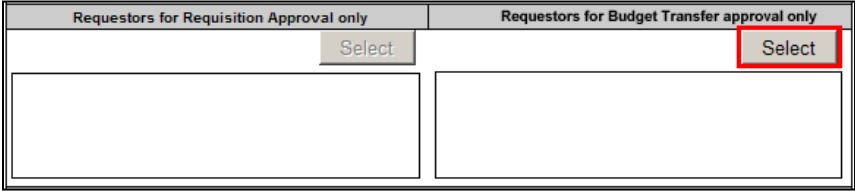

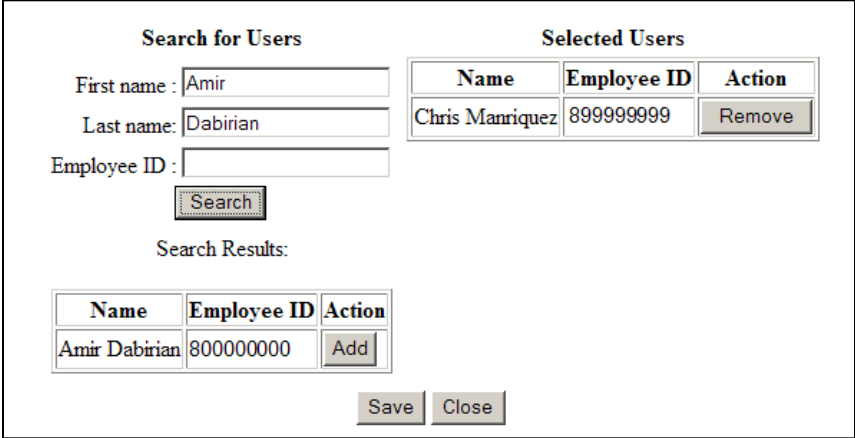
Processing Steps	Screen Shots
<p>Step 6b: If the employee has multiple jobs on campus you will be prompted to choose the appropriate position for the form.</p> <p>To review the position information, select a position and click Details.</p>	
<p>Step 6c: The job details will be displayed. Select OK to return to the position selection screen.</p>	

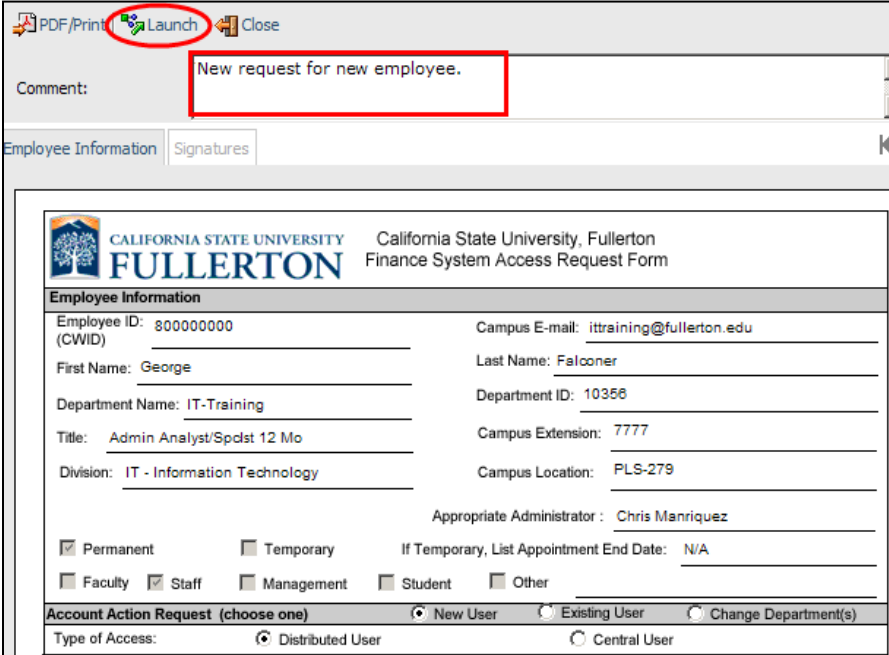
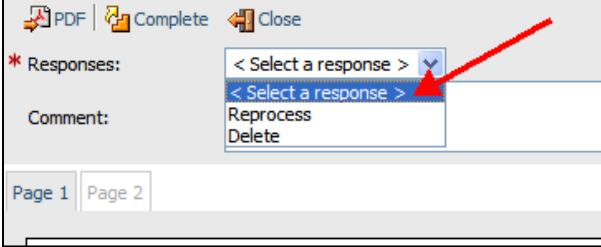
Processing Steps	Screen Shots
<p>Step 6d: When the correct position has been identified, select the position and click OK to continue.</p>	
<p>Step 7: Next, identify the action request:</p> <ul style="list-style-type: none"> • New User • Existing User • Change Department <p>Then, select the type of access:</p> <ul style="list-style-type: none"> • Distributed User • Central User 	 <p>Central Users are employees that work in departments such as: Budget Operations, Accounts Payable, Travel Operations, etc.</p>

Processing Steps	Screen Shots
<p>Step 8: Based upon the type of access selected, the appropriate columns become available.</p> <p>Select the 'add' box next to each role needed.</p> <p>If necessary, you can also remove any roles no longer required by choosing the 'remove' box next to the role.</p> <p> To review role descriptions, click the Role Description Reference () icon.</p>	 <p>The screenshot shows the 'California State University, Fullerton Finance System Access Request Form'. It includes fields for Employee Information (Employee ID, First Name, Department Name, Title, Division, Campus E-mail, Last Name, Department ID, Campus Extension, Campus Location, and Appropriate Administrator). Below this is the 'Account Action Request' section with radio buttons for 'New User', 'Existing User', and 'Change Department(s)', and a 'Type of Access' section with radio buttons for 'Distributed User' and 'Central User'. The 'Finance Distributed Roles' section has two columns: 'Add' and 'Remove'. The 'Add' column has checkboxes for 'Requisition Data Entry', 'Requisition Approval', and 'Budget Transfer Data Approval'. The 'Remove' column has checkboxes for 'Revenue/Expense Reports', 'Purchasing Reports', 'My Queries', and 'Extended Ed'. A '*Role Description Reference ->' link with an 'R' icon is at the bottom right.</p>
<p>Step 9: Next, identify the Department IDs being requested.</p> <p>Choose the Select button on the left to enter the Department ID(s) for Requisition and/or Reports access.</p> <p>Choose the Select button on the right to enter the Department ID(s) for Budget access.</p>	 <p>The screenshot shows the 'Department Access' section with two columns. The left column is for 'Requisition' and the right for 'Budget'. Each column has a 'Select' button. Red callout boxes point to these buttons with the text: 'Select this button to enter Department IDs for Requisition and Reports access.' and 'Select this button to enter Department IDs for Budget access.'</p>

Processing Steps	Screen Shots
<p>Step 10: For both Select buttons, only the Department IDs for the identified division are listed.</p> <p>Choose the appropriate department(s) and select OK.</p>	
<p>Step 11: Identify Requisition Requesters & Approvers If you selected “Requisition Data Entry” or “Requisition Approval” in the Finance Distributed Roles section, choose the Select button on the left to identify the appropriate Requisition Approver(s) or Requisition Requester(s).</p>	 <p> 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.</p>

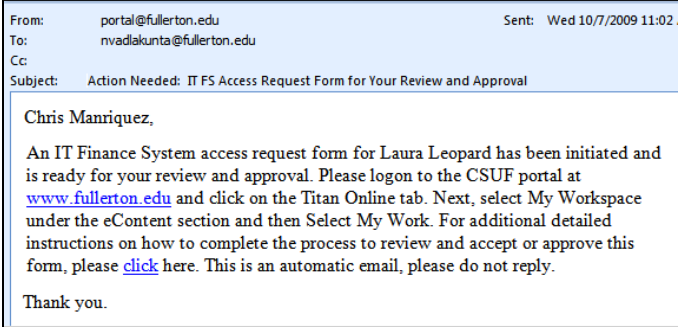

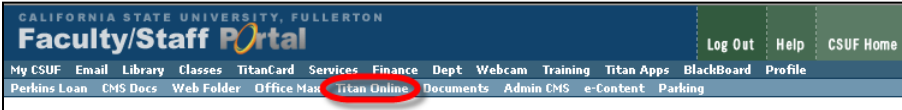
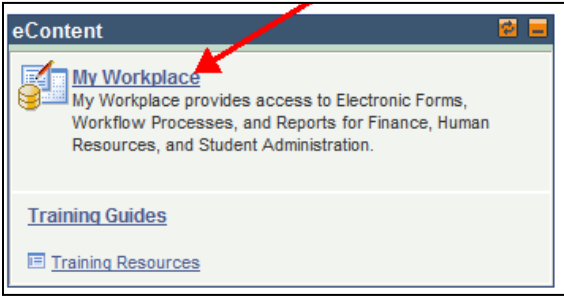
Processing Steps	Screen Shots
<p>Step 11a: If you selected "Requisition Data Entry," a list of all Requisition Approvers for the user's division will appear in a new window.</p> <p>Place a check mark next to each Requisition Approver who should be able to approve this user's requisitions.</p> <p>Click OK.</p>  <p>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.</p>	
<p>Step 11b: If you selected "Requisition Approval," a search page will open in a new window.</p> <p>Enter search criteria to find the user(s) that you wish to add.</p> <p>When a search result appears, click Add to add the user to the Selected Users list on the right.</p> <p>Click Remove next to a user in the Selected Users list to remove them.</p> <p>Click Save when you are finished adding users.</p>  <p>You will only be able to select users who are in the same division as specified in the Employee Information section.</p>	

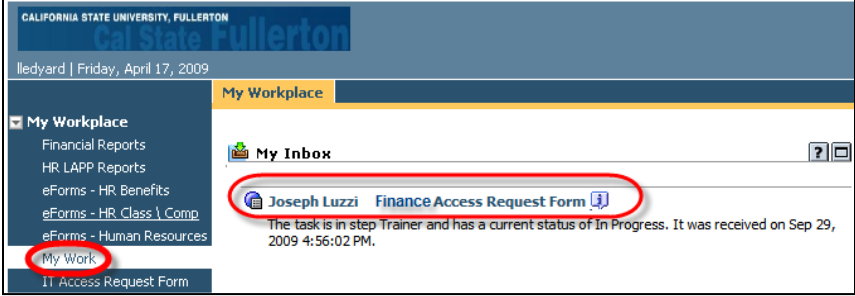



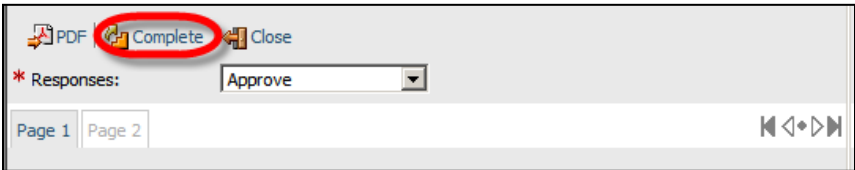
Processing Steps	Screen Shots
<p><u>Step 12: Identify Budget Transfer Requesters.</u></p> <p>If you selected "Budget Transfer Approval" in the Finance Distributed Roles section, choose the Select button on the right to identify the Budget Transfer Requester(s) for whom this user will approve budget transfers.</p>	 <p>The screenshot shows two side-by-side panels. The left panel is titled 'Requestors for Requisition Approval only' and has a 'Select' button. The right panel is titled 'Requestors for Budget Transfer approval only' and has a 'Select' button highlighted with a red rectangular box.</p>
<p><u>Step 12a:</u></p> <p>A search page will open in a new window.</p> <p>Enter search criteria to find the user(s) that you wish to add.</p> <p>When a search result appears, click Add to add the user to the Selected Users list on the right.</p> <p>Click Remove next to a user in the Selected Users list to remove them.</p> <p>Click Save when you are finished adding users.</p> <p> You will only be able to select users who are in the same division as specified in the Employee Information section.</p>	 <p>The screenshot displays a search interface. On the left, under 'Search for Users', there are input fields for 'First name' (Amir), 'Last name' (Dabirian), and 'Employee ID'. A 'Search' button is below. On the right, under 'Selected Users', there is a table with columns 'Name', 'Employee ID', and 'Action'. One row shows 'Chris Manriquez' with ID '899999999' and a 'Remove' button. Below this is the 'Search Results' section with a table showing 'Amir Dabirian' with ID '800000000' and an 'Add' button. At the bottom are 'Save' and 'Close' buttons.</p>

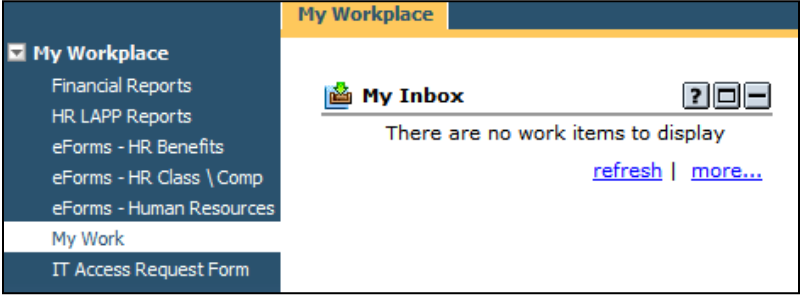
Processing Steps	Screen Shots
<p>Step 13: If necessary, add any comments in the 'Comment' field.</p> <p>Then, select the Launch link to complete processing of the form.</p>	 <p>The screenshot shows the top navigation bar with 'PDF/Print', 'Launch', and 'Close' buttons. Below is a 'Comment:' field with the text 'New request for new employee.' The 'Launch' button is highlighted with a red circle. Below the comment field are tabs for 'Employee Information' and 'Signatures'. The main content area displays the 'CALIFORNIA STATE UNIVERSITY FULLERTON' logo and 'Finance System Access Request Form' title. Under 'Employee Information', fields include Employee ID (800000000), First Name (George), Department Name (IT-Training), Title (Admin Analyst/Spolst 12 Mo), and Division (IT - Information Technology). There are also fields for Campus E-mail, Last Name (Falconer), Department ID (10356), Campus Extension (7777), and Campus Location (PLS-279). The 'Appropriate Administrator' is listed as Chris Manriquez. At the bottom, there are checkboxes for 'Permanent', 'Temporary', 'Faculty', 'Staff', 'Management', 'Student', and 'Other'. The 'Account Action Request' section has radio buttons for 'New User', 'Existing User', and 'Change Department(s)'. The 'Type of Access' section has radio buttons for 'Distributed User' and 'Central User'.</p>
<p>Rejected Form:</p> <p>If the form is rejected and returned to the initiator:</p> <ul style="list-style-type: none"> The initiator can update and reprocess the form The initiator can delete the form and start over. 	 <p>The screenshot shows the top navigation bar with 'PDF', 'Complete', and 'Close' buttons. Below is a '* Responses:' dropdown menu that is open, showing three options: '< Select a response >', 'Reprocess', and 'Delete'. A red arrow points to the 'Reprocess' option. Below the dropdown menu is a 'Comment:' field. At the bottom, there are tabs for 'Page 1' and 'Page 2'.</p>

3.0 Manager Approval Process

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

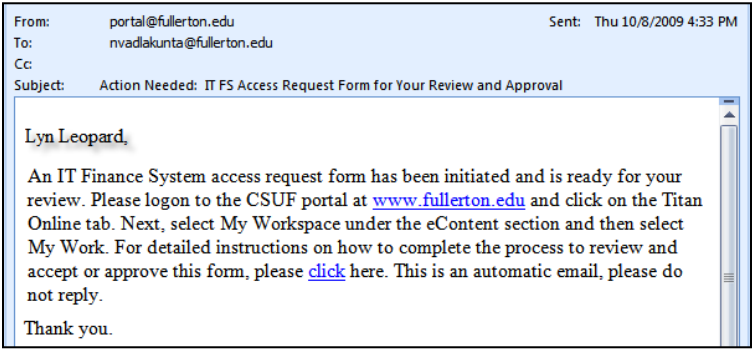

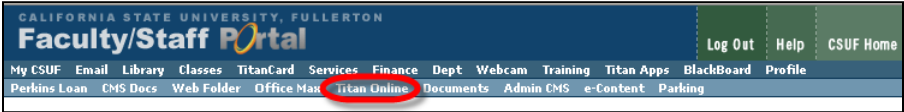
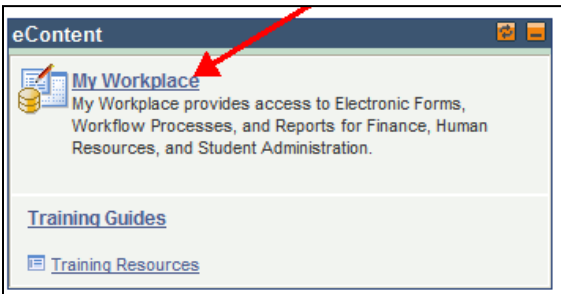
Processing Steps	Screen Shots
<p>Step 1: The appropriate manager receives an email to review the Access Request form electronically.</p>	
<p>Step 2: Log into the campus portal. Enter your campus username and password. Then, click Login.</p>	
<p>Step 3: Next, select the Titan Online tab.</p>	
<p>Step 4: Next, select My Workplace under the eContent section.</p>	

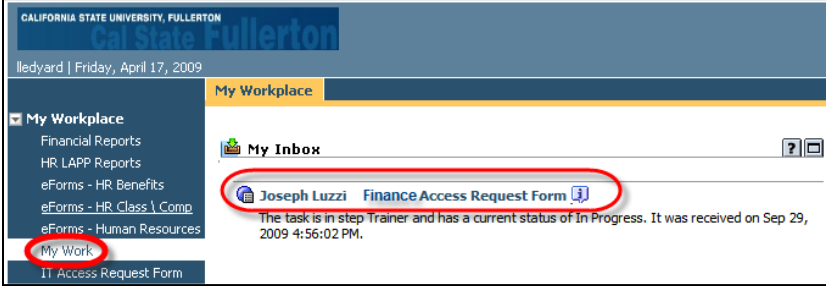

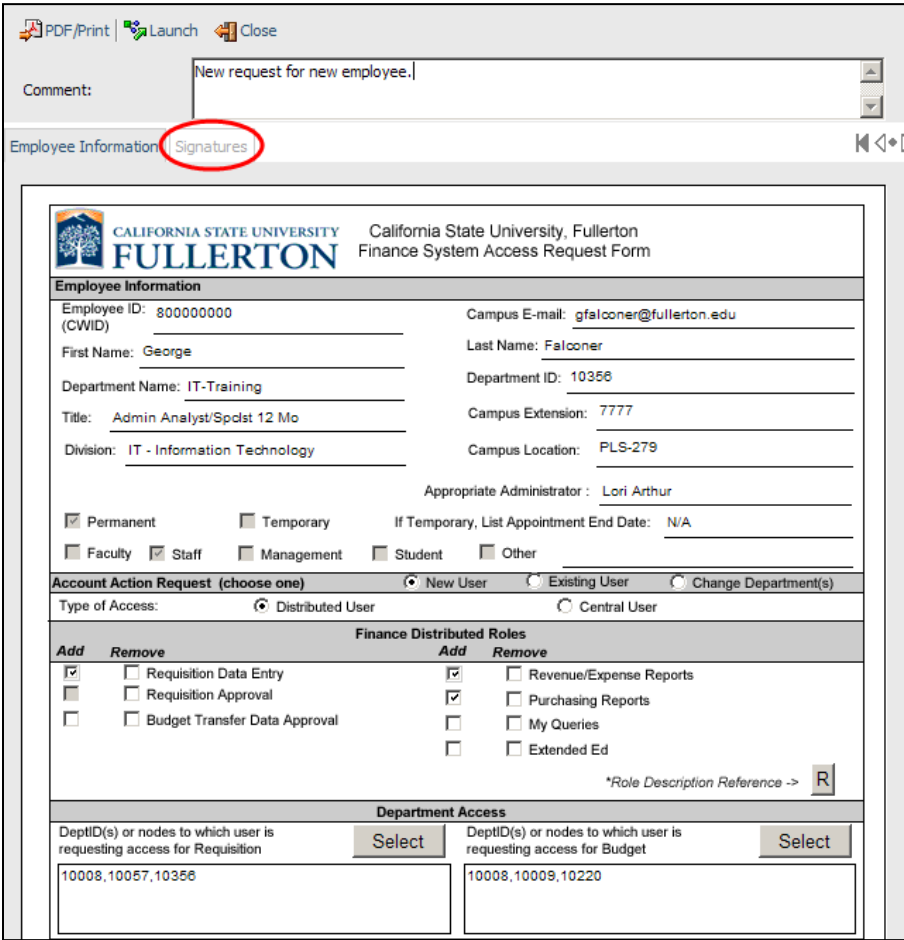
Processing Steps	Screen Shots
<p>Step 5: Then select My Work.</p> <p>The pending Access Requests form will appear.</p> <p>Choose the appropriate form.</p>	
<p>Step 6: Review the access request form.</p> <p>Select the Signatures page and certify the access is appropriate.</p>	
<p>Step 7: Next, either "Approve" or "Reject" the form.</p> <p>If the request is rejected it will return to the form initiator.</p>	
<p>Step 8: Once the response is selected, click the Complete button.</p> <p>Note:</p> <ul style="list-style-type: none"> 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. <p> If the request is approved by the ISO admin office, the manager will be notified via email.</p>	

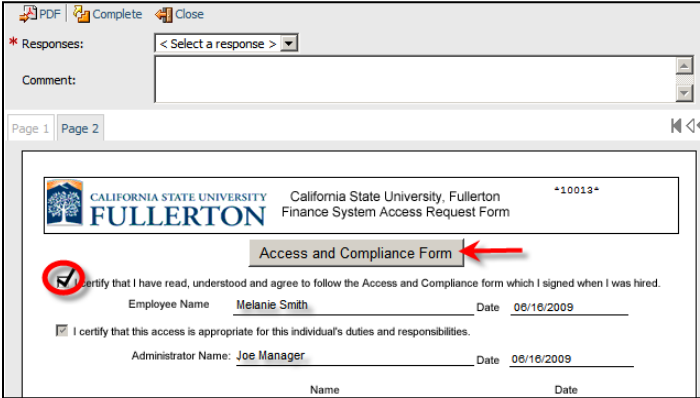

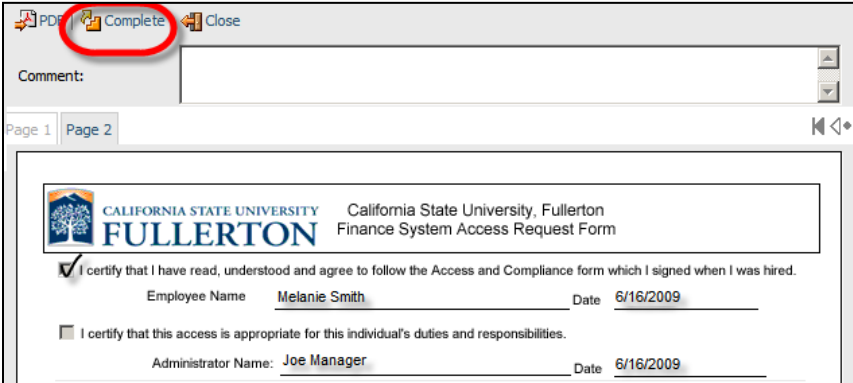
Processing Steps	Screen Shots
<p>Step 9: The Access Request form is approved and removed from the list of pending ARF's.</p>	 <p>The screenshot displays the 'My Workplace' interface. On the left is a dark blue navigation menu with the following items: 'My Workplace' (with a checkmark icon), 'Financial Reports', 'HR LAPP Reports', 'eForms - HR Benefits', 'eForms - HR Class \ Comp', 'eForms - Human Resources', 'My Work', and 'IT Access Request Form'. The main content area has a yellow header 'My Workplace' and a 'My Inbox' section. The 'My Inbox' section contains the text 'There are no work items to display' and two links: 'refresh' and 'more...'. There are also icons for help, maximize, and close in the top right of the inbox area.</p>


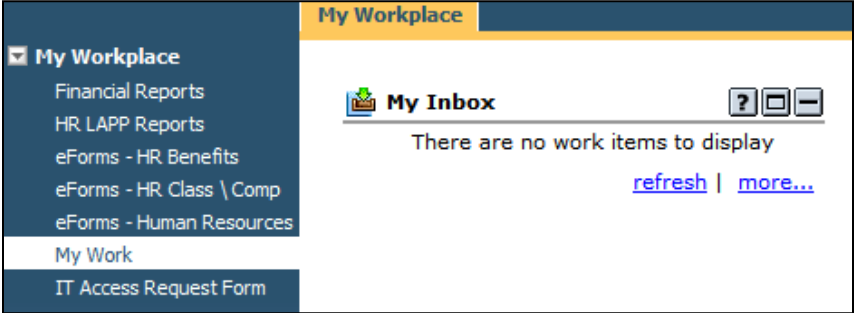
4.0 Employee Review Process

If the Access Request form is initiated by someone other than the employee, the employee must review and accept the form electronically.

Processing Steps	Screen Shots
<p>Step 1: Employee receives an email to review the Access Request form electronically.</p>	
<p>Step 2: Log into the campus portal. Enter your campus username and password. Then, click Login.</p>	
<p>Step 3: Next, select the Titan Online tab.</p>	
<p>Step 4: Next, select My Workplace under the eContent section.</p>	

Processing Steps	Screen Shots
<p>Step 5: Then select My Work.</p> <p>The pending Access Requests form will appear.</p> <p>Choose the appropriate form.</p>	 <p>The screenshot shows the 'My Workplace' page with a sidebar menu. The 'My Work' item in the sidebar is circled in red. The main content area shows a 'My Inbox' section with a red circle around the entry for 'Joseph Luzzi Finance Access Request Form'. Below the entry, it states: 'The task is in step Trainer and has a current status of In Progress. It was received on Sep 29, 2009 4:56:02 PM.'</p>
<p>Step 6: The Access Request form is displayed.</p> <p>Review the fields on the page for accuracy.</p> <p>To approve the form, select the Signatures page.</p> <p> 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.</p>	 <p>The screenshot shows the 'Finance System Access Request Form' with the 'Signatures' tab selected and circled in red. The form includes fields for Employee Information (Employee ID, First Name, Department Name, Title, Division, Campus E-mail, Last Name, Department ID, Campus Extension, Campus Location, Appropriate Administrator), Account Action Request (New User, Existing User, Change Department(s)), Finance Distributed Roles (Add/Remove checkboxes for Requisition Data Entry, Requisition Approval, Budget Transfer Data Approval, Revenue/Expense Reports, Purchasing Reports, My Queries, Extended Ed), and Department Access (DeptID(s) or nodes to which user is requesting access for Requisition and Budget).</p>

Processing Steps	Screen Shots
<p>Step 7: Electronically sign the form by checking the statement “I certify that I have read, understood and agree to follow the Access and Compliance form which I signed when I was hired.”</p> <p>By checking this statement your name and date will auto-populate.</p> <p>If necessary, add any comments into the ‘Comment’ field.</p>	 <p>The screenshot shows a web browser window with a PDF viewer. At the top, there are icons for PDF, Complete, and Close. Below that is a 'Responses' dropdown menu with the text '< Select a response >'. A 'Comment' field is visible below the dropdown. The main content area shows the 'CALIFORNIA STATE UNIVERSITY FULLERTON' logo and the title 'California State University, Fullerton Finance System Access Request Form'. A button labeled 'Access and Compliance Form' is highlighted with a red arrow. Below the button, there are two checked checkboxes: 'I certify that I have read, understood and agree to follow the Access and Compliance form which I signed when I was hired.' and 'I certify that this access is appropriate for this individual's duties and responsibilities.'. The form also contains fields for 'Employee Name: Melanie Smith', 'Date: 06/16/2009', and 'Administrator Name: Joe Manager', 'Date: 06/16/2009'.</p>
<p>Step 8: Next, either “Accept” or “Reject” the form.</p> <p>If the request is rejected it will return to the form to your appropriate administrator.</p>	 <p>The screenshot shows a close-up of the 'Responses' dropdown menu. The menu is open, showing three options: '< Select a response >', '< Select a response >', 'Accept', and 'Reject'. The 'Accept' and 'Reject' options are highlighted by a red rectangular box.</p>
<p>Step 9: To complete the approval process, select the Complete link.</p>	 <p>The screenshot shows the 'Complete' link in the browser window's toolbar, circled in red. The rest of the form content is visible below, showing the same certification checkboxes and populated fields as in the previous screenshots.</p>

Processing Steps	Screen Shots
<p>Step 10: The Access Request form is approved and removed from the list of pending ARF's.</p> <p>The form is routed to the Division of Information Technology.</p> <p> The Access Request form cannot be changed once approved by the employee. Please contact the ISO security admin Pat Nelson for assistance.</p> <p>Once access has been granted, the employee will be notified by the ISO administrative office.</p>	 <p>The screenshot shows a web interface with a dark blue sidebar on the left containing a menu with items like 'My Workplace', 'Financial Reports', 'HR LAPP Reports', 'eForms - HR Benefits', 'eForms - HR Class \ Comp', 'eForms - Human Resources', 'My Work', and 'IT Access Request Form'. The main content area has a yellow header 'My Workplace' and a white box titled 'My Inbox' with a message: 'There are no work items to display' and links for 'refresh' and 'more...'.</p>