Division of Information Technology Training

PeopleSoft (ERP) Finance
Access Request Form User Guide

Last Revised: **3/22/11**

California State University Fullerton

REVISION CONTROL

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

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

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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.

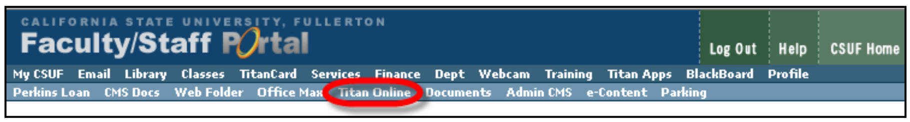
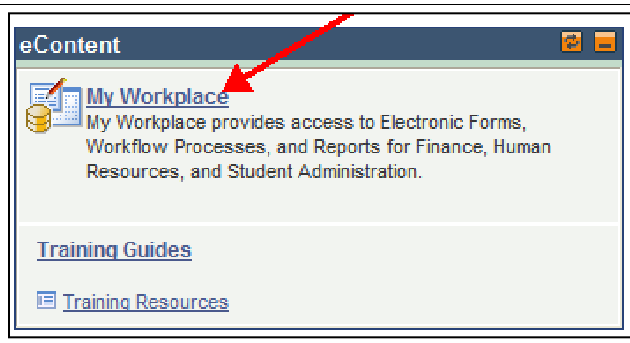
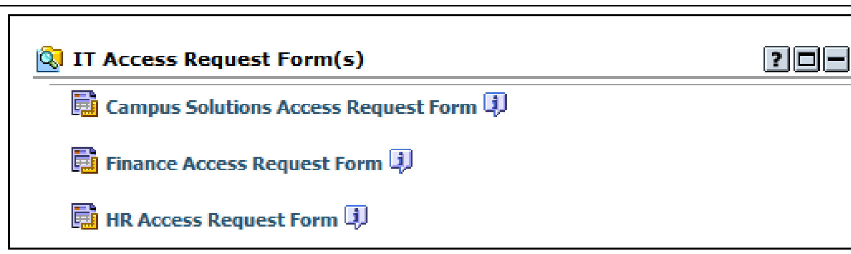
To avoid delays in access due to significant training requirements it is recommended you submit a form for immediate access needs. Then, submit a separate form for lower priority access requests.

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
<u>Step 1:</u> Log into the campus portal. Enter your campus username and password. Then, click **Login**.	
<u>Step 2:</u> Next, select the **Titan Online** tab.	
<u>Step 3:</u> Next, select **My Workplace** under the eContent section.	
<u>Step 4:</u> Depending upon your access you may see additional forms and reports. To access the Access Request Form, select the **IT Access Request Form** link.	
<u>Step 5:</u> Next, select the appropriate form for the required access: • Finance Access Request Form	

Processing Steps	Screen Shots
	Prior to accessing the form all popup blockers must be disabled.

Step 6:

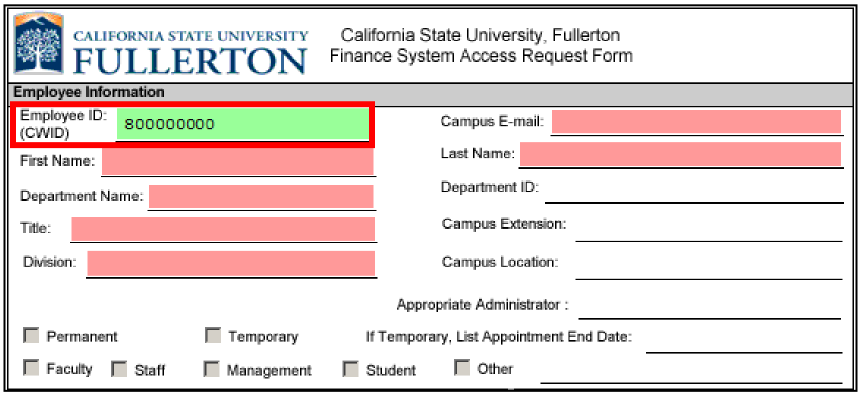
The form opens in a new window.

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.

The arrow keys ( ) are only used in the ERP Campus Solutions Access Request Form.



Step 6a:

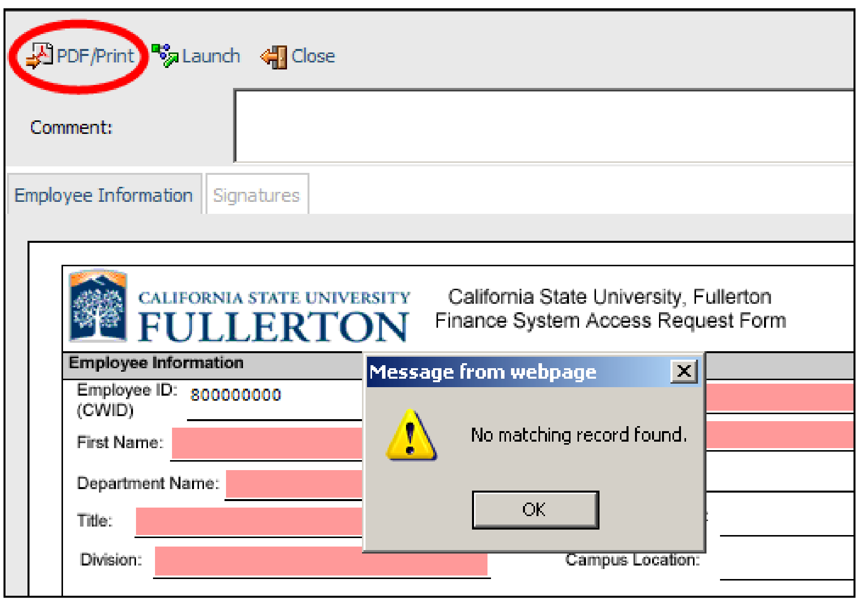
If the CWID is not listed in PeopleSoft an error message will pop up indicating "no matching record found."

To continue, select the **PDF/Print** (PDF/Print) button and complete the form manually.

Send the manually completed form to LH-700 Attn: Security.

The Access Request Form must **only** be completed manually if an error occurs.

If the form populates with incorrect personal data, contact Human Resources.



Note - The manual process is required for the following:

- Student employees
- Contractors
- Temporary employees
- Auxiliary
- Etc.

<table>
<tr><th>Processing Steps</th><th>Screen Shots</th></tr>
<tr><td>

<u>**Step 6b:**</u>
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**.

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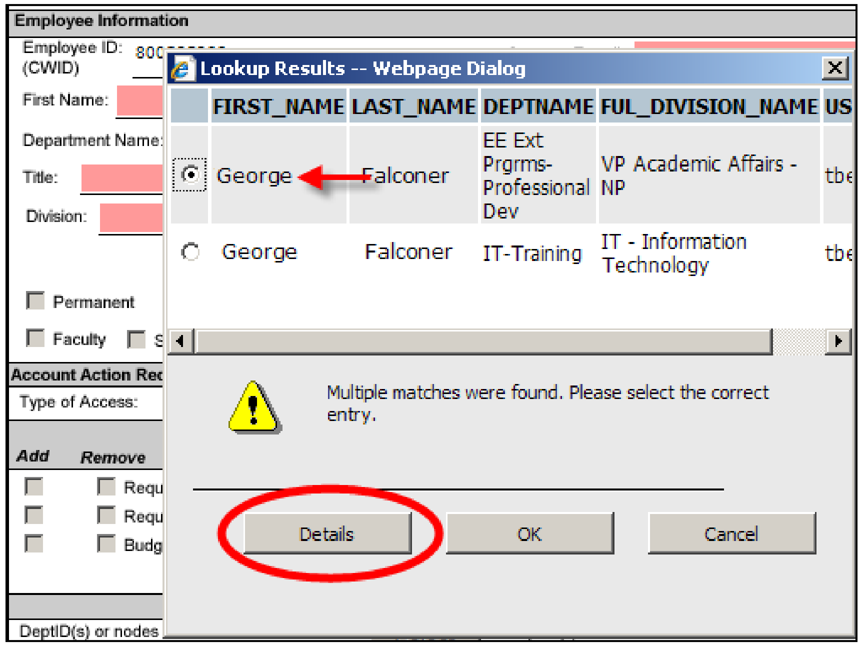

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<u>**Step 6c:**</u>
The job details will be displayed.
Select **OK** to return to the position selection screen.

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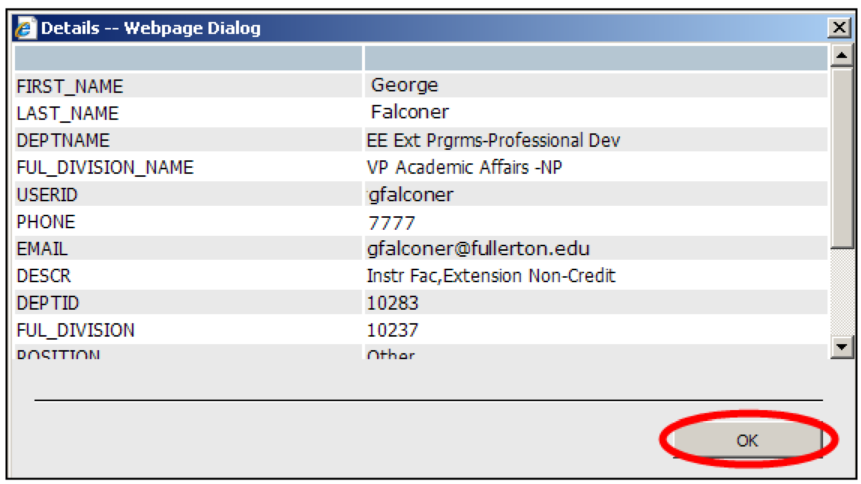

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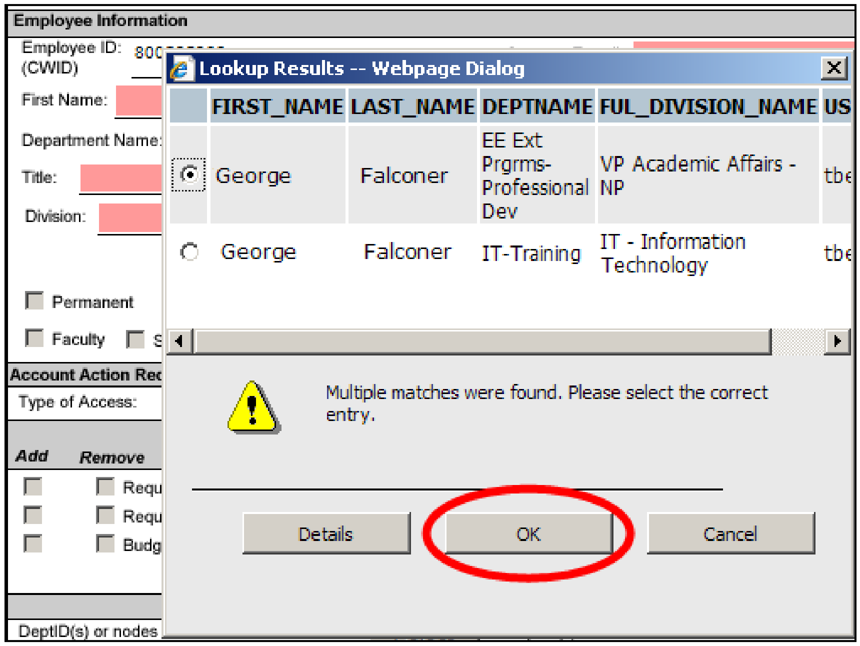
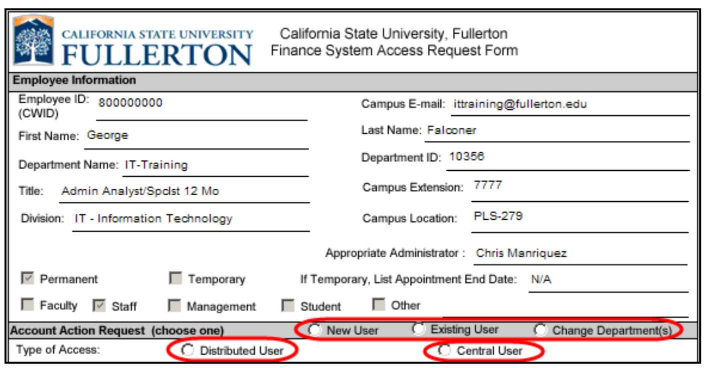
Processing Steps	Screen Shots
<u>Step 6d:</u> When the correct position has been identified, select the position and click **OK** to continue.	
<u>Step 7:</u> Next, identify the action request: • New User • Existing User • Change Department Then, select the type of access: • Distributed User • Central User	 Central Users are employees that work in departments such as: Budget Operations, Accounts Payable, Travel Operations, etc.

<table>
<tr><th>Processing Steps</th><th>Screen Shots</th></tr>
<tr><td>

<u>**Step 8:**</u>
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.

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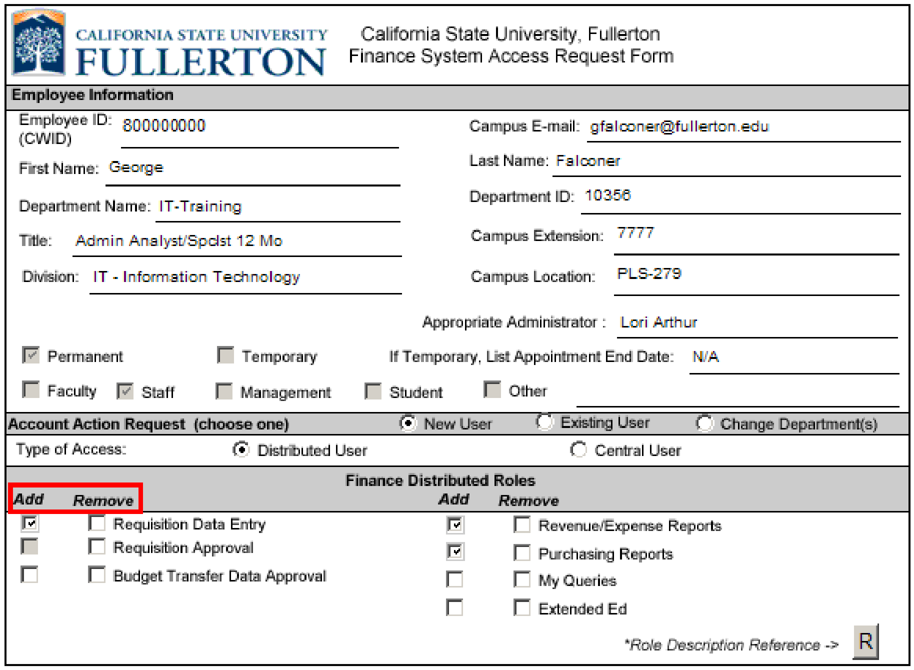

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<u>**Step 9:**</u>
Next, identify the Department IDs being requested.

Choose the **Select** button on the left to enter the Department ID(s) for Requisition and/or Reports access.

Choose the **Select** button on the right to enter the Department ID(s) for Budget access.

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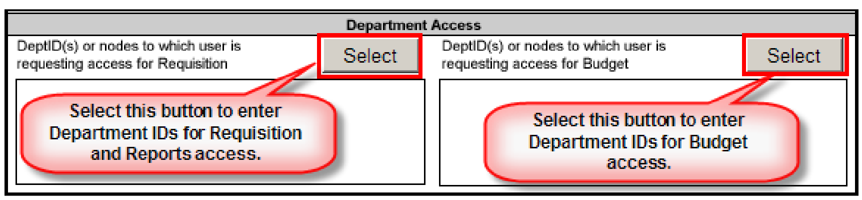

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<tr><th>Processing Steps</th><th>Screen Shots</th></tr>
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<u>**Step 10:**</u>
For both **Select** buttons, only the Department IDs for the identified division are listed.

Choose the appropriate department(s) and select **OK**.

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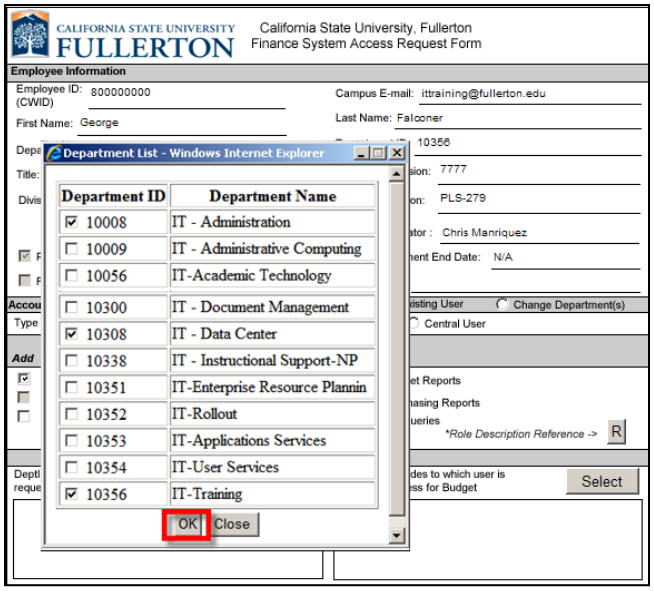

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<u>**Step 11: Identify Requisition Requesters & Approvers**</u>
If you selected “Requisition Data Entry” or “Requisition Approval” in the Finance Distributed Roles section, choose the **Select** button on the left to identify the appropriate Requisition Approver(s) or Requisition Requester(s).

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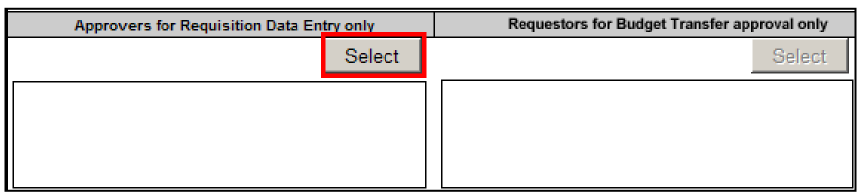

If you selected “Requisition Data Entry,” you will be identifying the Requisition approver(s) who can approve requisitions for this user. If you selected “Requisition Approval,” you will be identifying the Requisition Requester(s) for whom this user will approve requisitions.

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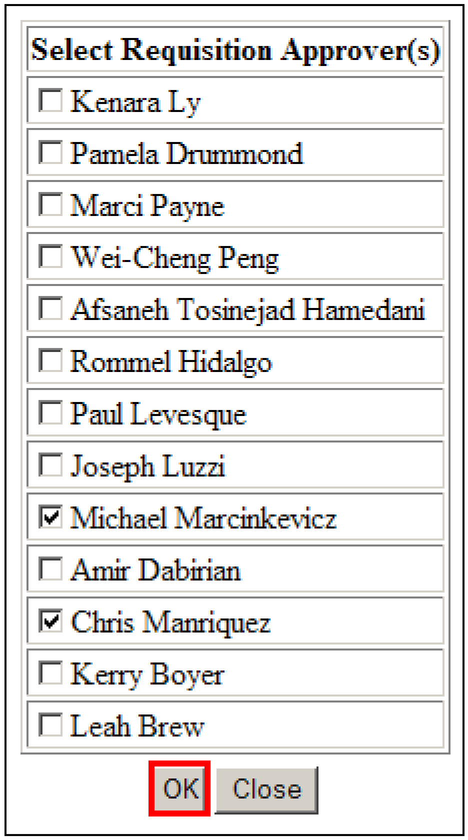
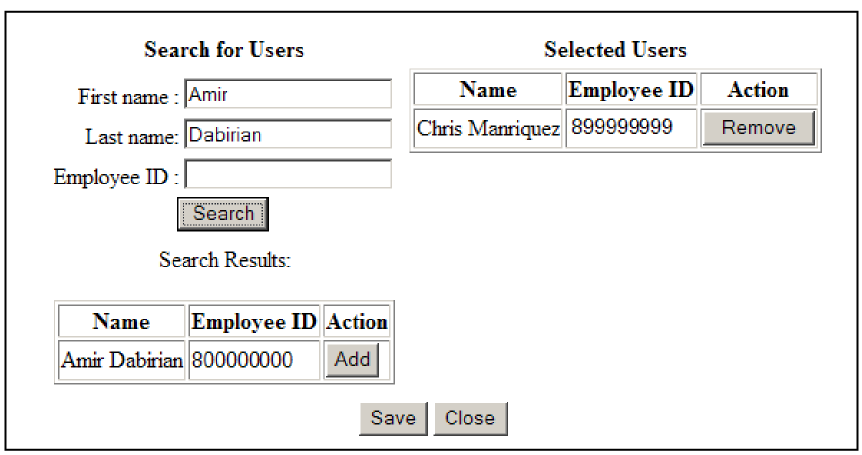
</table>

Processing Steps	Screen Shots
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. 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.	
Step 11b: If you selected "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 are in the same division as specified in the Employee Information section.	

<table>
<tr><th>Processing Steps</th><th>Screen Shots</th></tr>
<tr><td>

<u>**Step 12: Identify Budget Transfer Requesters.**</u>
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.

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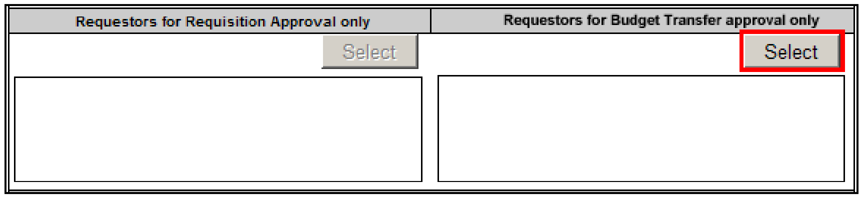

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<u>**Step 12a:**</u>
A search page will open in a new window.

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 are in the same division as specified in the Employee Information section.

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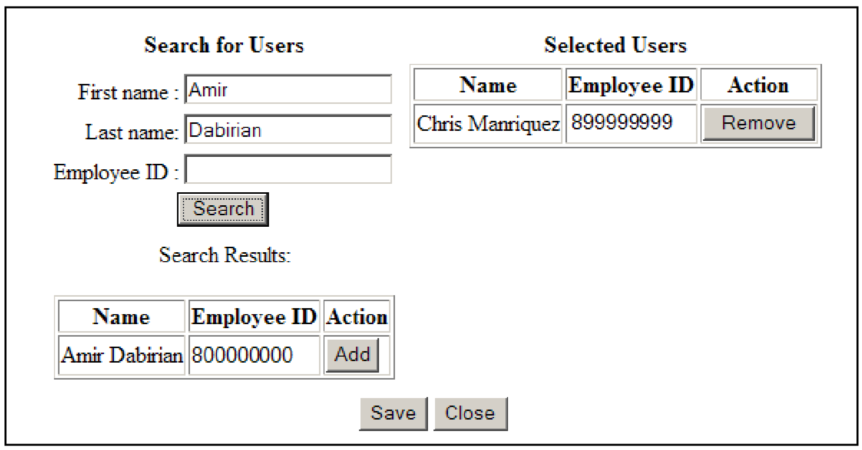

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<tr><th>Processing Steps</th><th>Screen Shots</th></tr>
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<u>Step 13:</u>
If necessary, add any comments in the ‘Comment’ field.

Then, select the **Launch** link to complete processing of the form.

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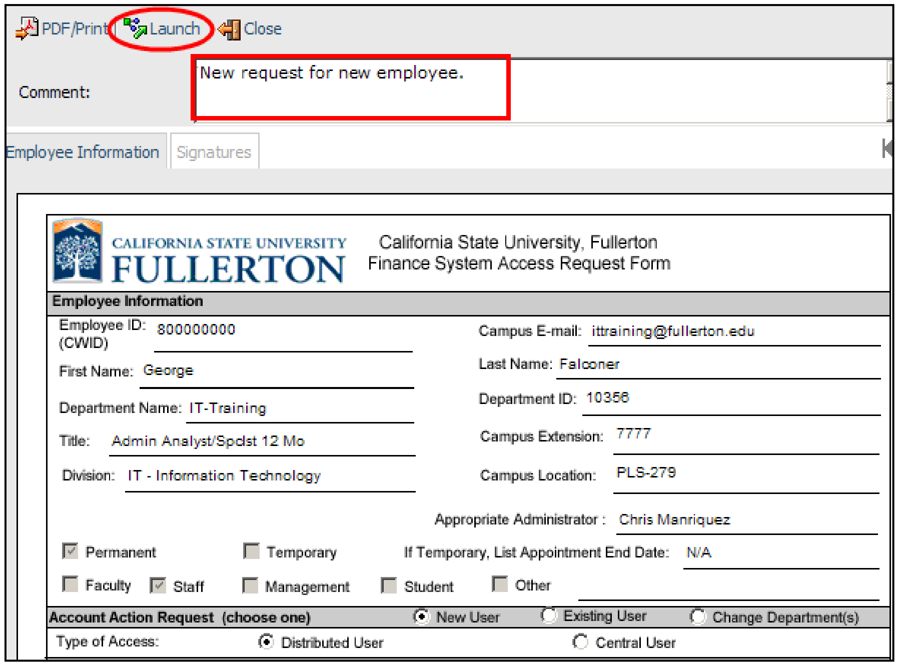

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<u>Rejected Form:</u>

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.

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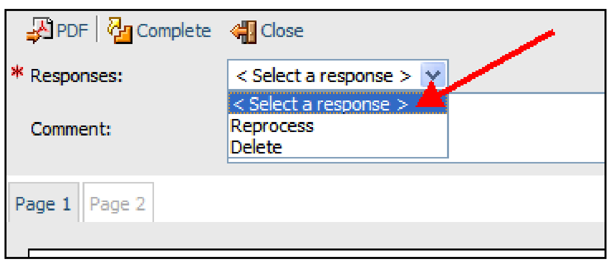

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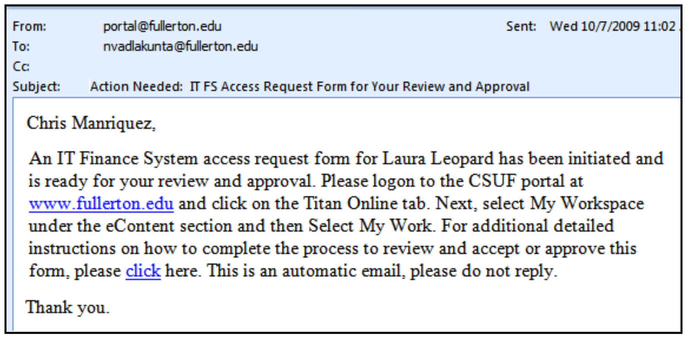
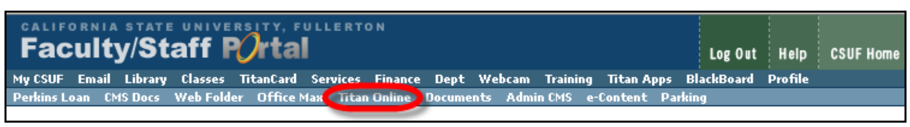
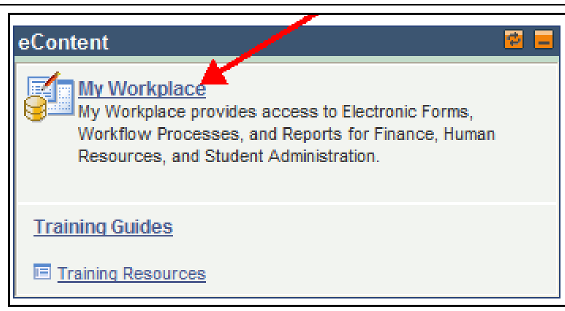
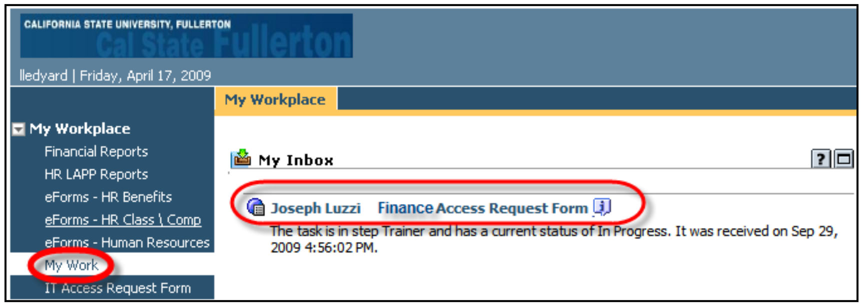
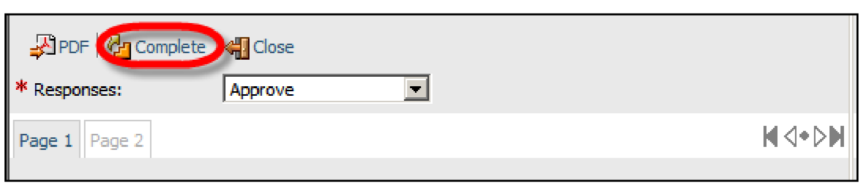
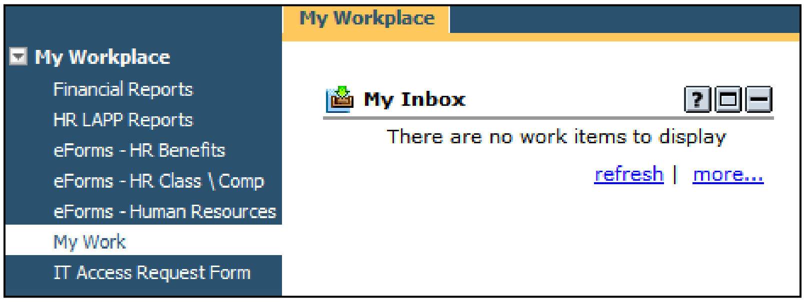
3.0 Manager Approval Process

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

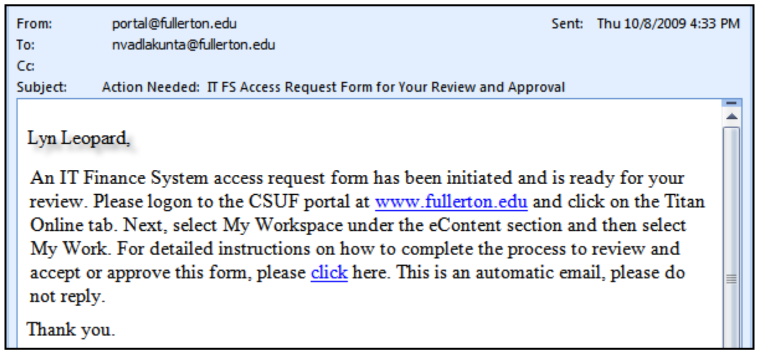
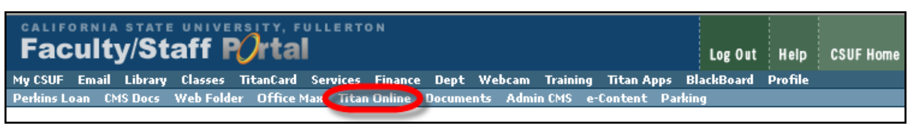
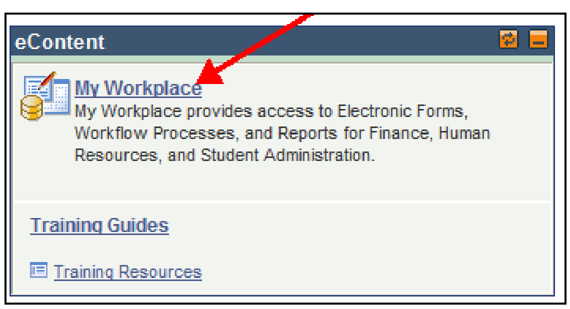
Processing Steps	Screen Shots
Step 1: The appropriate manager receives an email to review the Access Request form electronically.	 From: portal@fullerton.edu Sent: Wed 10/7/2009 11:02 To: nvadlakunta@fullerton.edu Cc: Subject: Action Needed: IT FS Access Request Form for Your Review and Approval Chris Manriquez, An IT Finance System access request form for Laura Leopard 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. 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.	
Step 4: Next, select **My Workplace** under the eContent section.	

Processing Steps	Screen Shots
Step 5: Then select **My Work.** The pending Access Requests form will appear. Choose the appropriate form.	
Step 6: Review the access request form. Select the **Signatures** page and certify the access is appropriate.	
Step 7: Next, either "Approve" or "Reject" the form. 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.	

Processing Steps	Screen Shots
Step 9: The Access Request form is approved and removed from the list of pending ARF's.	

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
Step 1: Employee receives an email to review the Access Request form electronically.	 From: portal@fullerton.edu Sent: Thu 10/8/2009 4:33 PM To: nvadlakunta@fullerton.edu Cc: Subject: Action Needed: IT FS Access Request Form for Your Review and Approval Lyn Leopard, An IT Finance System access request form has been initiated and is ready for your review. 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 detailed instructions on how to complete the process to review and accept or approve this form, please click here. 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.	
Step 4: Next, select **My Workplace** under the eContent section.	

<table>
<tr><th>Processing Steps</th><th>Screen Shots</th></tr>
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<u>**Step 5:**</u>
Then select **My Work**.

The pending Access Requests form will appear.

Choose the appropriate form.

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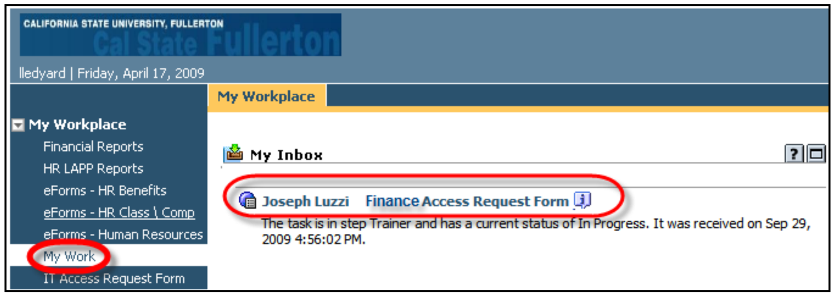

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<u>**Step 6:**</u>
The Access Request form is displayed.

Review the fields on the page for accuracy.

To approve the form, select the **Signatures** page.

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.

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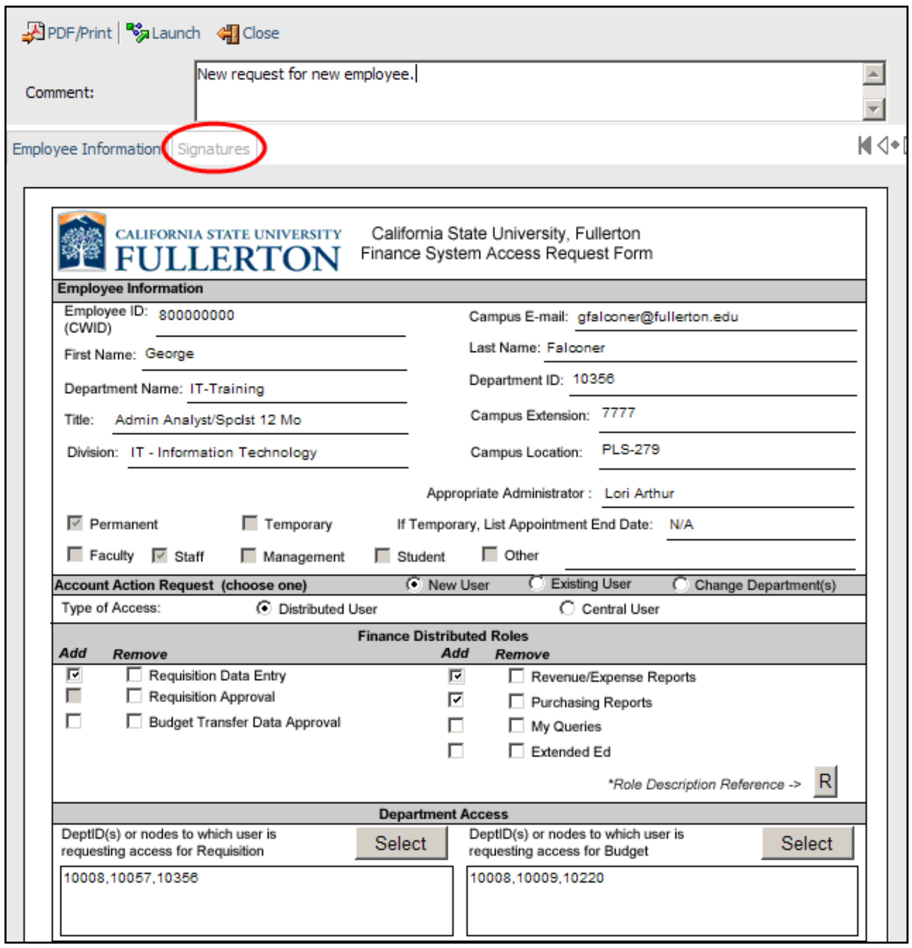

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<table>
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<tr><td>

<u>Step 7:</u>
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.”

By checking this statement your name and date will auto-populate.

If necessary, add any comments into the ‘Comment’ field.

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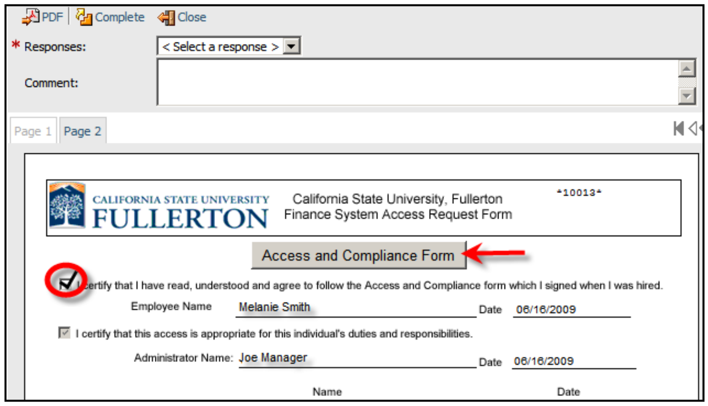

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<u>Step 8:</u>
Next, either “Accept” or “Reject” the form.

If the request is rejected it will return to the form to your appropriate administrator.

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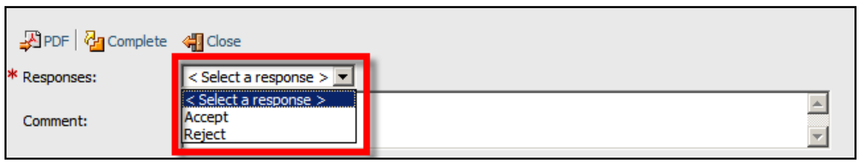

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<u>Step 9:</u>
To complete the approval process, select the **Complete** link.

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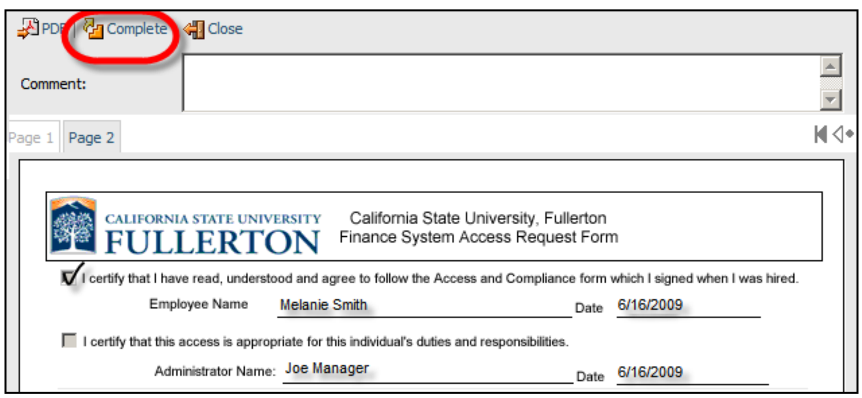

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Processing Steps	Screen Shots
<u>Step 10:</u> The Access Request form is approved and removed from the list of pending ARF's. The form is routed to the Division of Information Technology. The Access Request form cannot be changed once approved by the 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.