



## **PeopleSoft User ID Request Form for Financials**

- **Global Settings for PeopleSoft Security:**

An employee/student id (EMPLID) is required to request a PeopleSoft Login Account. In cases, where generic user accounts are requested, these will be linked to supervisor's EMPLID.

For auditing purposes, the Employee/Student's ID (EMPLID) must be linked to the Username. Supervisors must inform Information Technology when Faculty, Staff, Student Assistants or Part-Time employees are no longer employed by the College so that the proper measures are taken to terminate their account.

- **Security Access for New Employees (Faculty and Staff):**

A new employee (Full-time or Part-time) that will be replacing another employee is only required to complete an '***IT Action Form***' since the access has been pre-approved for that position. A new position employee must complete an '***IT Action and Access Form***' to request a new account for PeopleSoft Financials and/or PeopleSoft Student Administration systems.

All employees must have a valid employee id (EMPLID) assigned by the Office of Human Resources before requesting a PeopleSoft User ID.

- **Security Access for Existing Employees (Faculty and Staff):**

All current employees must complete an '***IT Action and Access Form***' to request additional security access on their existing User ID for PeopleSoft Financials and/or PeopleSoft Student Administration system.

- **Security Access for Student Assistants:**

In order to ensure the security of financial data, student assistants who need to access the PeopleSoft System must have a unique user id that will provide access to specific data-entry functions defined by their Department. All Student Assistant User IDs will be different from the one they use to access the **iCampus** Online System, and will have a limited timeframe to access the system which is NOT to be access outside Office environment.

An '***IT Action and Access Form***' must be completed for all student assistants that currently have a student id (EMPLID).

### **Instructions on how to complete the '*IT Action and Access Form*':**

1. The '***IT Action and Access Form***' must be completed and approved by the employee's Supervisor.
2. The '***IT Access Form***' must be approved by the Functional Lead(s) and Corresponding Dean.
3. The Office of Human Resources (HR) must validate employment and employee id (EMPLID) on the '***IT Action Form***' for new employees. HR may keep a copy of the Action and Access forms on employees' personal file for future actions.
4. The Office of Information Technology (IT) will create the User ID with a temporary password and notify the employee when it's ready for pickup. The employee must personally pickup the account from IT to sign a '***Username and Password Agreement***' and to get instructions on how to login with correct URLs for production and testing environment as well as how to change their temporary password once they login successfully.



# Information Technology Action Form

## PeopleSoft Financial System

**To be completed by Department Supervisor:**

**Legal Name:** \_\_\_\_\_ **Effective Date:** \_\_\_\_\_  
(Last) (First) (Middle) (Hire, Transfer, Additional Access, Terminated, etc.)

**Position:** \_\_\_\_\_ **Department:** \_\_\_\_\_  
(Title) (Name)

**Building:** \_\_\_\_\_ **Room:** \_\_\_\_\_ **Phone:** \_\_\_\_\_  
(Name) (Number) (Number)

**PeopleSoft Financial System Actions (Check all that Apply):** \* HR must validate EMPLID and Access Form must be completed with appropriate approvals.  
\*\* Access Form must be completed with Supervisor, Functional Lead and Dean's Approval.

**CREATE NEW USER ID\*:**

**IMPORTANT: Does the new user need to be setup as a PURCHASING REQUESTER?**

NO, New User will NOT be a Purchasing Requester. (Note: Department Secretaries, PT Employee, etc.)

YES, New User will be a Purchasing Requester\*\*. Purchasing Agent Required Approval: \_\_\_\_\_

Supervisor Approving Purchase Requisitions for New User: \_\_\_\_\_

Create New User as Existing User ID: \_\_\_\_\_

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Supervisor Signature

\_\_\_\_\_  
Date

**To be completed by Human Resources:**

**Employment and EMPLID Validation for New Employees:**

**Classification (Check all that Apply):**  FT Faculty  PT Faculty  Administrator  Staff  PT Employee  Student Assistant

**Employee/Student ID** \_\_\_\_\_  
(EMPLID)

\_\_\_\_\_  
Human Resources Approval - Print Name

\_\_\_\_\_  
Human Resources Approval - Signature

\_\_\_\_\_  
Date



# Information Technology Access Form

## PeopleSoft Financial System

Print Name of Person Requiring Access \_\_\_\_\_

Department \_\_\_\_\_

Date \_\_\_\_\_

Campus E-mail Address \_\_\_\_\_

Office Phone Number \_\_\_\_\_

EMPLID \_\_\_\_\_

**To be completed by Department Supervisor. To be approved by Dean and Functional Lead:**

### PEOPLESFT SYSTEM - FINANCIAL

DEPT	PERMISSION LIST	ACTIONS	PERMISSION LIST MENU DESCRIPTION
<b>Accounts Payable</b>			
	AP INQUIRY	Inquire Only	All Account Payables inquiry Access.
	AP PMT	Payment Processing	All Account Payables Payment Processing.
	VOUCHER ENTRY	Add & Update NO CORRECTION	Vouchers data entry access without Setups and Correction.
	VOUCHER INQUIRY	Inquire Only	Vouchers Inquiry Only.
<b>Budgets</b>			
	BUDGET REPORTS For MANAGEMENT	Add, Update, UD All & CORRECTION	All Access on Budget Reports with all components like Use, Setup, Inquire, Process and Report. Includes all actions like Add, Update/Display, Update/Display All and Correction.
	BUDGET REPORTS For STAFF	Update Display	Budget Reports Printing and Inquiry Only.
<b>Business Office</b>			
	BANK RECONCILE	Add, Update, UD All & CORRECTION	All Bank Reconciliation menus with all components like Use, Setup, Inquire, Process and Report. Includes all actions like Add, Update/Display, Update/Display All and Correction.
<b>Financial Services</b>			
	FINANCIAL SERVICES MANAGEMENT	Add, Update, UD All & CORRECTION	Dean of Financials Services Management Level Access. Includes all components: Use, Setup, Inquire, Process and Reports. Also includes all Actions: Add, Update/Display, Update/Display All and Correction.
	FS INQUIRY	Inquire Only	All Financials Inquiry Access on Requisitions, Purchase Orders, Receiving, Vouchers, & Payments. Note: Default Permission List for all Requisition Entry Employees.
<b>General Ledger</b>			
	JOURNAL ENTRY	GL Journal Entry	Limited Journal Entry without Correction.
	JOURNAL INQUIRY	Inquire Only	Journal Entry Inquiry Only.
<b>Purchasing</b>			
	REQUISITION APPROVAL	Add & Update NO CORRECTION	Deans Level Access to Approve Purchase Requests.
	REQUISITION ENTRY	Add & Update NO CORRECTION	All Purchase Requesters Default Permission List for Requisition Data Entry.
	REQUISITION INQUIRY	Inquire Only	Purchase Requisition Use Pages are Display Only.
	PO SUPR	PO Management	All Purchasing Management that includes purchasing correction access.
	PO INQUIRY	Inquire Only	Purchase Order Inquiry Only.
	VENDOR CORRECTION	Vendor Entry with Correction	Purchasing Vendor Entry with Correction Access for Management.
	VENDOR ENTRY	Add & Update NO CORRECTION	Vendor Data Entry without Correction.
	VENDOR INQUIRY	Inquire Only	Vendor Use Pages are Display Only.
<b>Shipping and Receiving</b>			
	SHIPPING & RECEIVING	Add & Update NO CORRECTION	Specific permission list for Shipping and Receiving. Provides limited access to Manage Purchase Orders, Manage Returned Material, Manage Shipments and Requisition Items.
<b>Technical</b>			
	PROCESS MONITOR	Monitor Process Jobs Print Reports	Process Monitor provides access to budget reports, print requisitions, and other process jobs. Note: Default Permission List for all Requisition Entry Employees.
	QUERY MANAGER	Add & Update NO CORRECTION	Query Tool Access to run public and private Queries. Individual Users will only be able to create private queries and it's also dependent on Query Access Groups that limit access to individual records. Query Manager tool is provided with PeopleSoft User permission list.

**Update Existing User ID by adding the following Navigation(s) and Action(s):**

Ex. Purchasing, POs, Review PO Information, POs, Purchase Order Inquiry	Actions
	<input type="checkbox"/> Add <input type="checkbox"/> Update Display <input type="checkbox"/> Update Display/History <input type="checkbox"/> Correction
	<input type="checkbox"/> Add <input type="checkbox"/> Update Display <input type="checkbox"/> Update Display/History <input type="checkbox"/> Correction
	<input type="checkbox"/> Add <input type="checkbox"/> Update Display <input type="checkbox"/> Update Display/History <input type="checkbox"/> Correction
	<input type="checkbox"/> Add <input type="checkbox"/> Update Display <input type="checkbox"/> Update Display/History <input type="checkbox"/> Correction
	<input type="checkbox"/> Add <input type="checkbox"/> Update Display <input type="checkbox"/> Update Display/History <input type="checkbox"/> Correction

Please return signed Action and Access Forms to the Department of Information Technology.

\_\_\_\_\_  
*Person Requesting Access Signature*

\_\_\_\_\_  
*Print Name*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Supervisor's Approval Signature*

\_\_\_\_\_  
*Print Name*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Functional Lead's Approval Signature*

\_\_\_\_\_  
*Print Name*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Dean's Approval Signature*

\_\_\_\_\_  
*Print Name*

\_\_\_\_\_  
*Date*

**Information Technology Use Only:**

Last Updated: 7/20/2007

*PeopleSoft8 Action and Access Request Form for Financials.doc*

Created by: \_\_\_\_\_ Date: \_\_\_\_\_ Database: \_\_\_\_\_ User ID: \_\_\_\_\_