Account Request (PS Financials and BI)

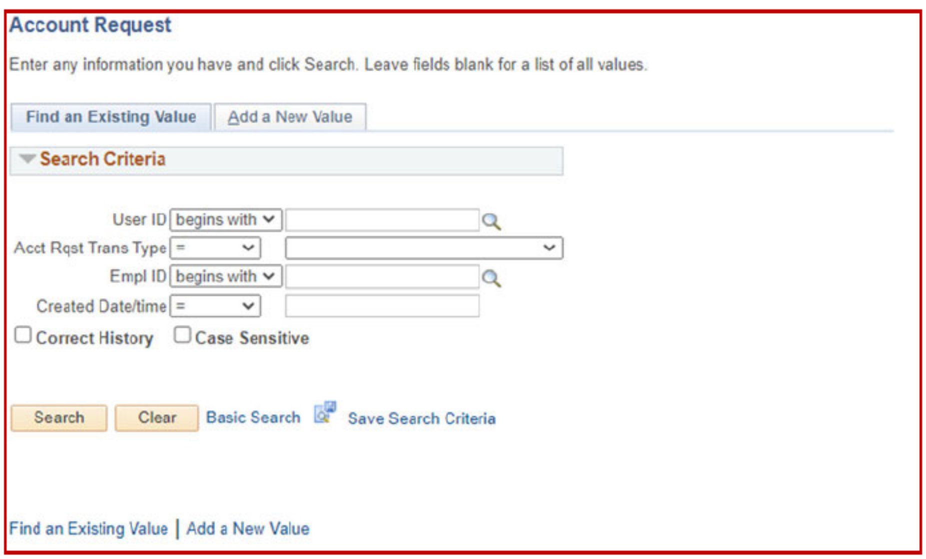
Quick Reference Guide

1. Login to PS Financials.

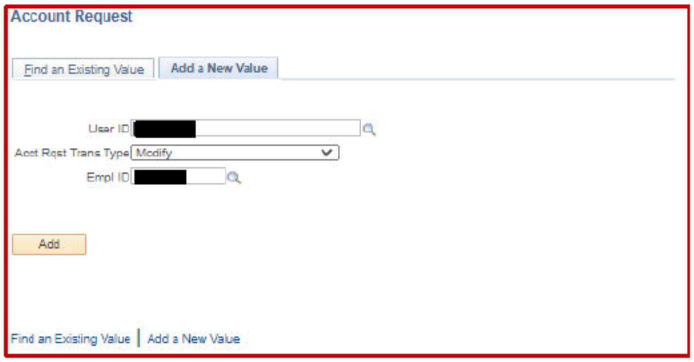
2. Click on the NavBar button in upper right corner of screen.

3. Follow this path to Account Request: *U of L Custom > UL Account Request > Account Request*
   - *The User ID field should be populated with the User ID of the **REQUESTOR** when logging into PS Financials.*

4. Go to ***Add a New Value*** tab.
   - When entering an account request, you will **ALWAYS** select ***Add a New Value.***
   - You will designate if you are adding, modifying or removing access, or if the user has been transferred in the next field.
   - *If the person already has a PeopleSoft Financials account with roles previously assigned you will use Modify, Remove, or in the case of a move to a new unit Transfer. If this is a brand new PeopleSoft Financials account you will designate the trans type as Add.*



5. Information entered on the Account Request / Add a New Value screen is for the person **requesting access** for someone else (entering **your** information). Click ***Add***.



Account Request

Find an Existing Value | Add a New Value

User ID [redacted]

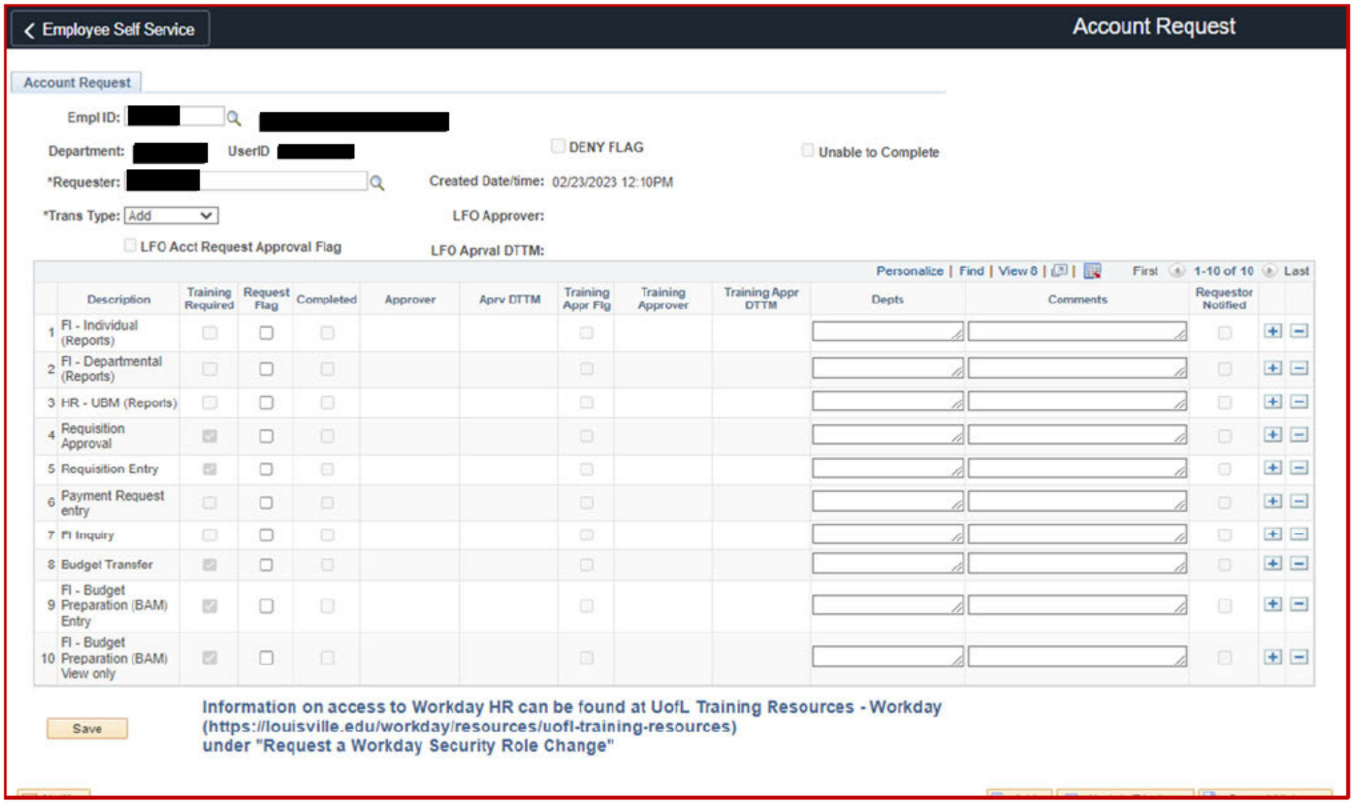
Acct Rqst Trans Type Modify

Empl ID [redacted]

Add

Find an Existing Value | Add a New Value

6. Select each line of security access being requested.
   - Note the free format fields for ***Depts*** (IDs) and ***Comments*** when needed.
   - From this screen you can also see which levels of access require training before the requested access is granted.
   - If you request access for a level of security where training is required a notification will be sent to the responsible area for the training and they will authorize your attendance and completion of the required training.
   - Each time a level of approval has been granted this screen will be updated with the user and time of approval.
   - You will be able to access this screen and see the status of your request at any time.
   - Once you click ***Save*** the form will be routed to the next approval level and an email notification will be sent to the next approval level.



Employee Self Service | Account Request

Account Request

Empl ID: [redacted]

Department: [redacted] UserID [redacted] DENY FLAG Unable to Complete

*Requester: [redacted] Created Date/time: 02/23/2023 12:10PM

*Trans Type: Add LFO Approver:

LFO Acct Request Approval Flag LFO Aprval DTTM:

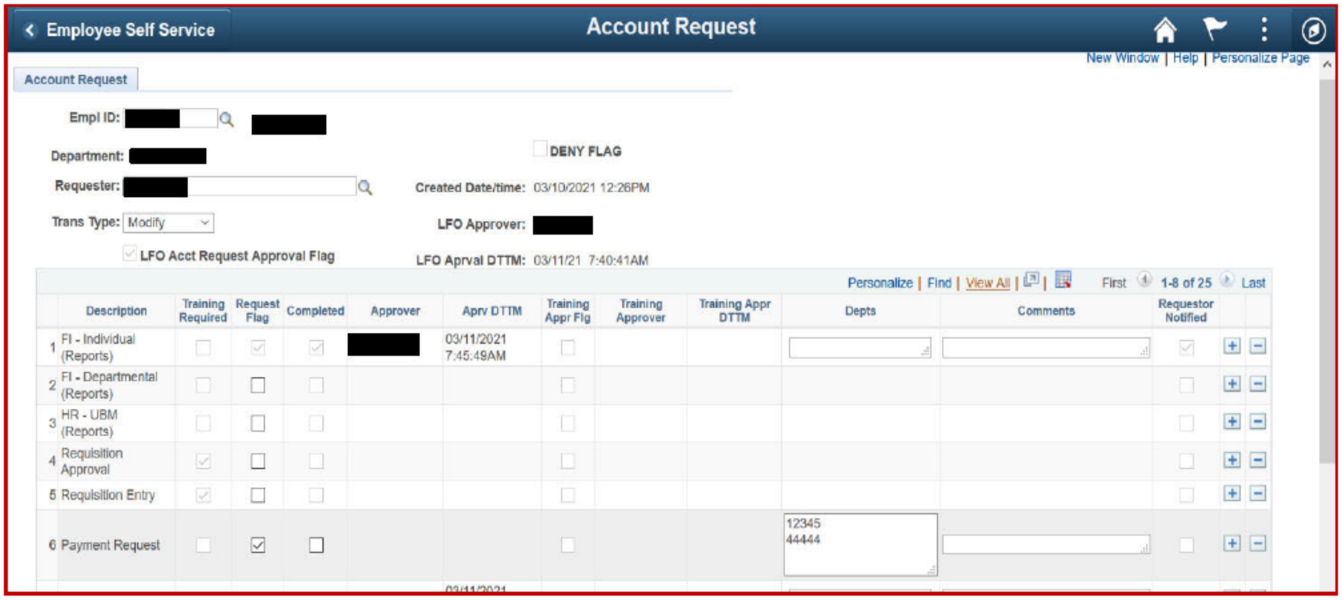
Personalize | Find | View 8 | First 1-10 of 10 Last

	Description	Training Required	Request Flag	Completed	Approver	Aprv DTTM	Training Appr Flg	Training Approver	Training Appr DTTM	Depts	Comments	Requestor Notified
1	FI - Individual (Reports)											
2	FI - Departmental (Reports)											
3	HR - UBM (Reports)											
4	Requisition Approval	✓										
5	Requisition Entry	✓										
6	Payment Request entry											
7	FI Inquiry											
8	Budget Transfer	✓										
9	FI - Budget Preparation (BAM) Entry	✓										
10	FI - Budget Preparation (BAM) View only	✓										

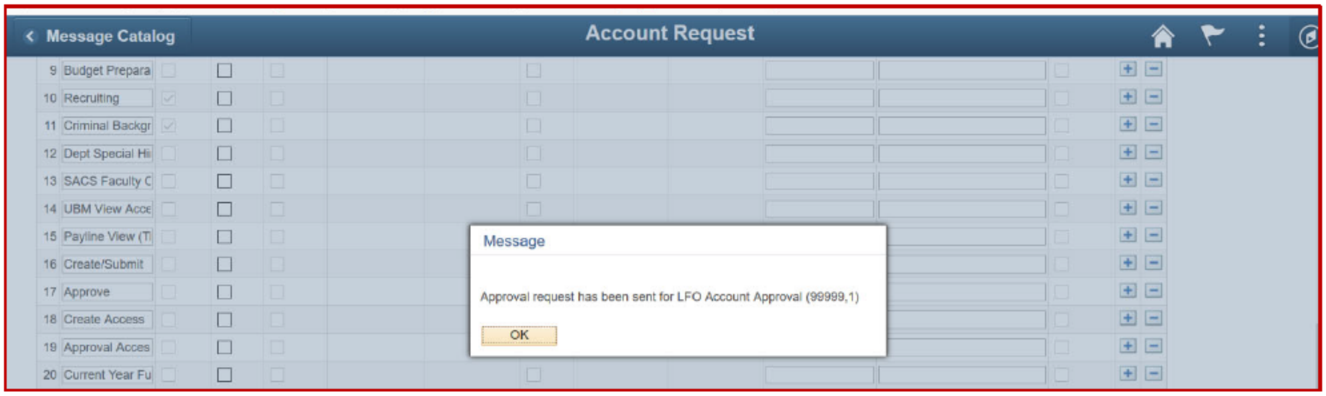
Save

Information on access to Workday HR can be found at UofL Training Resources - Workday (https://louisville.edu/workday/resources/uofl-training-resources) under "Request a Workday Security Role Change"

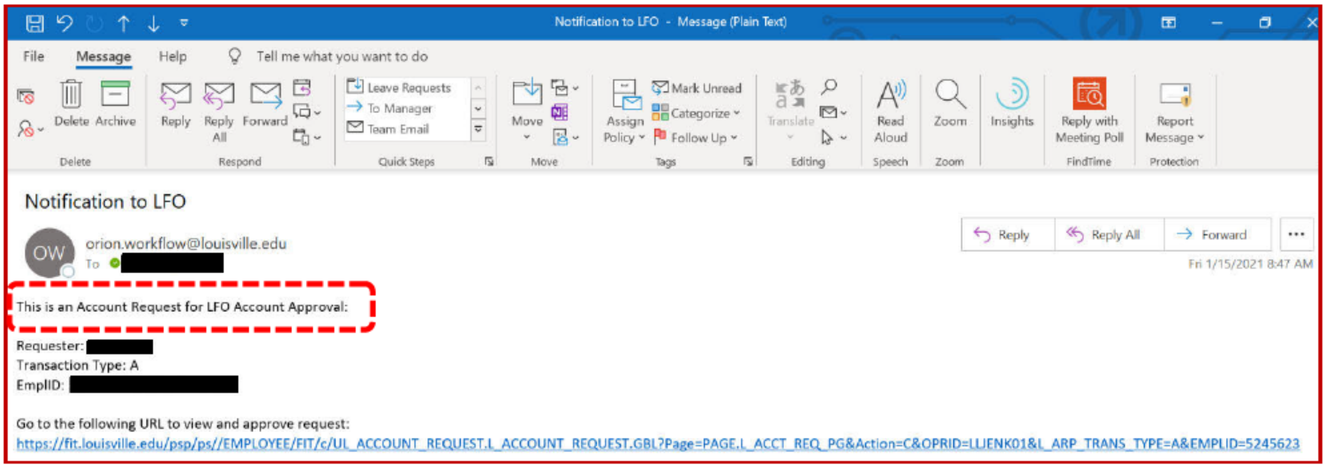
7. To enter multiple department IDs for a role requiring this information, please see sample below.
    - You can make the ***Depts*** and ***Comments*** larger by putting the mouse on the bottom right-hand side of the box and dragging it to the size you want.
    - You can get it to go to the next line by simply hitting enter.



8. To select the areas of access, click on the ***Request Flag*** column and click ***Save***.
    - Every time the ***Save*** button is pressed, notifications are sent to respective approvers.
    - The first step in the approval process is for the appropriate LFO to approve the request for access.



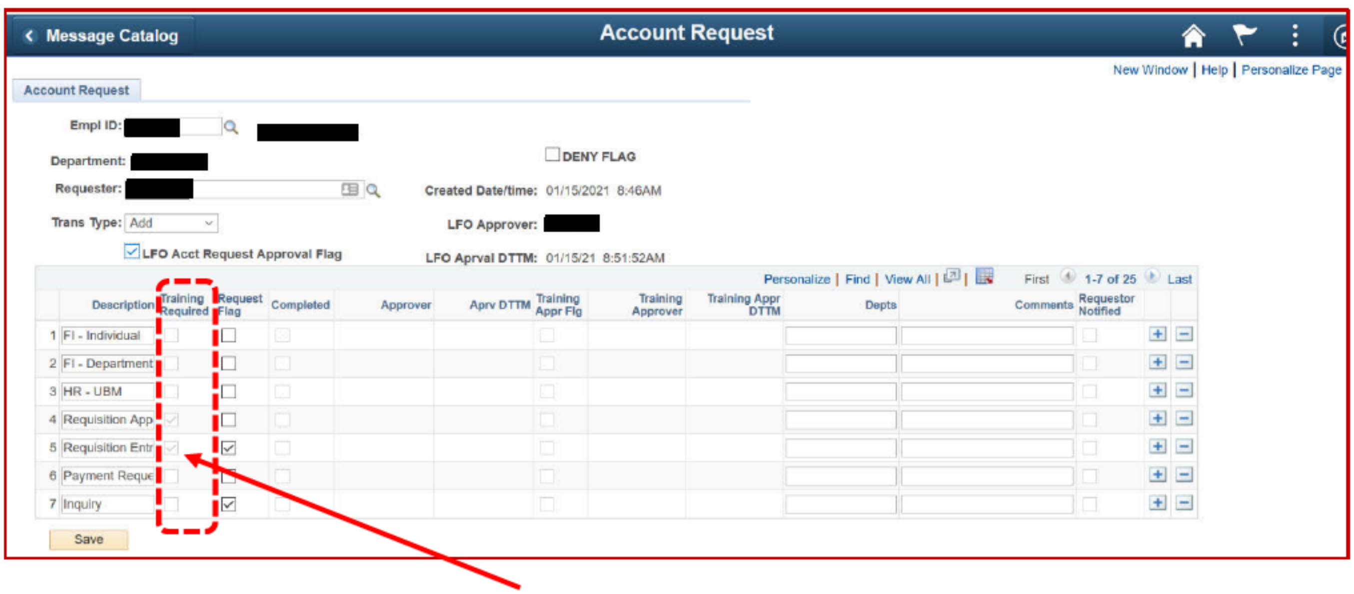
9. The LFO will receive an email notification of the pending request.



10. The LFO can click on the link in email received and will be taken to the request (*may require ULink login*).
    - The LFO will then approve or deny the account request and press ***Save***.
    - The userid of the LFO will be recorded on the form along with a time/date stamp when the request was approved.

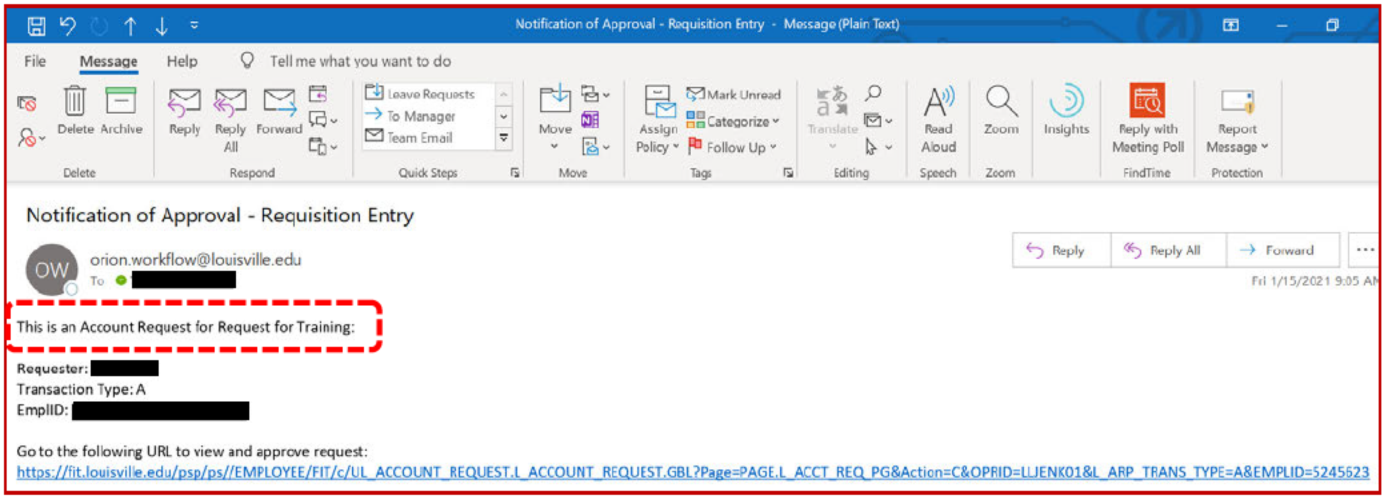
11. When the ***Save*** button is pressed the respective notifications will go to the next step for each process.

12. To demonstrate the workflow path, we will show how this works for ***Requisition Entry*** (*which requires training*) and ***Financial Inquiry*** (*which does not require training*).

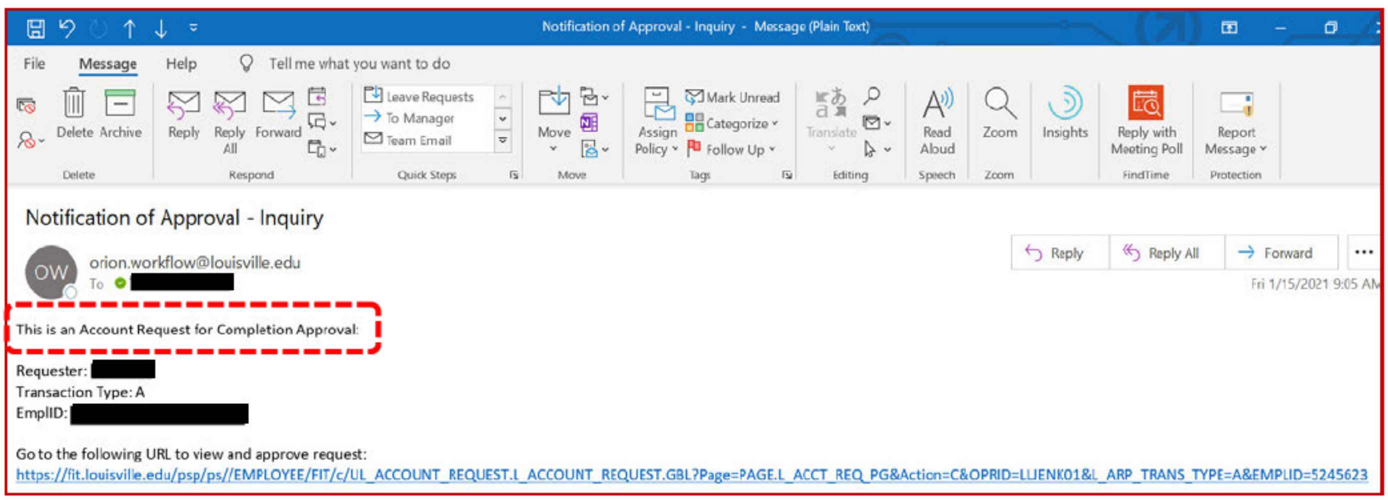


13. Note that the selected item "***Requisition Entry***" has the ***Training Required*** box checked. The notification for this entry goes to the person who handles the training for that functionality.

14. Email notification sent directly to person who handles the training for that functionality.

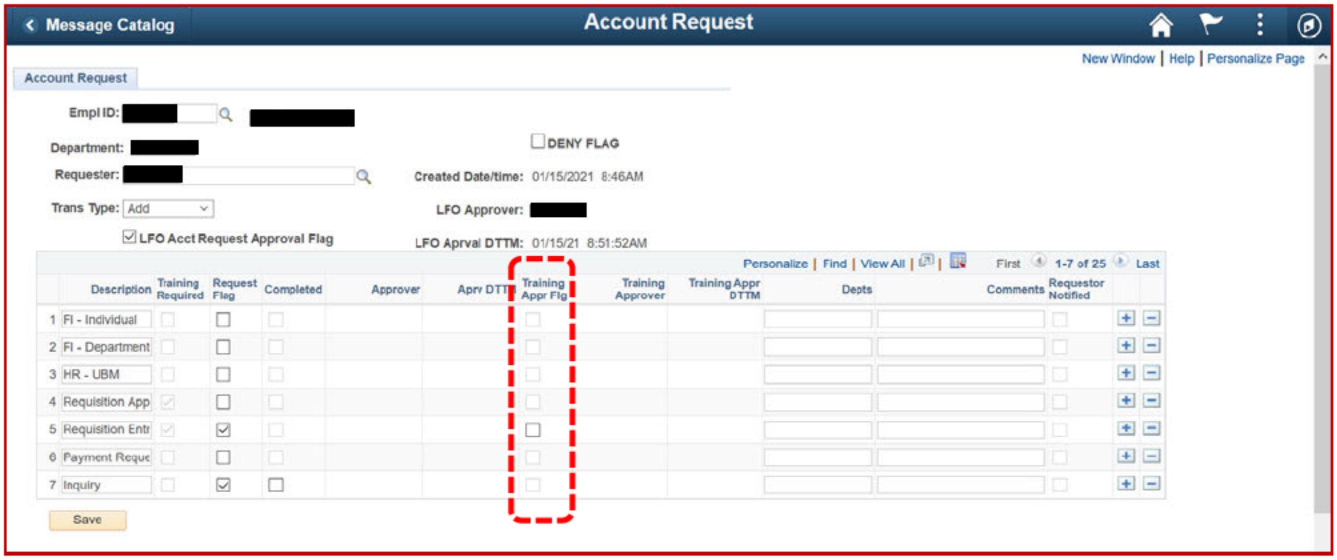


15. The selected item "***Inquiry***" (*pic under #12*) does not have the ***Training Required*** box checked, email notification goes to the security administrator responsible for assigning the appropriate security roles within the PeopleSoft Financials system.

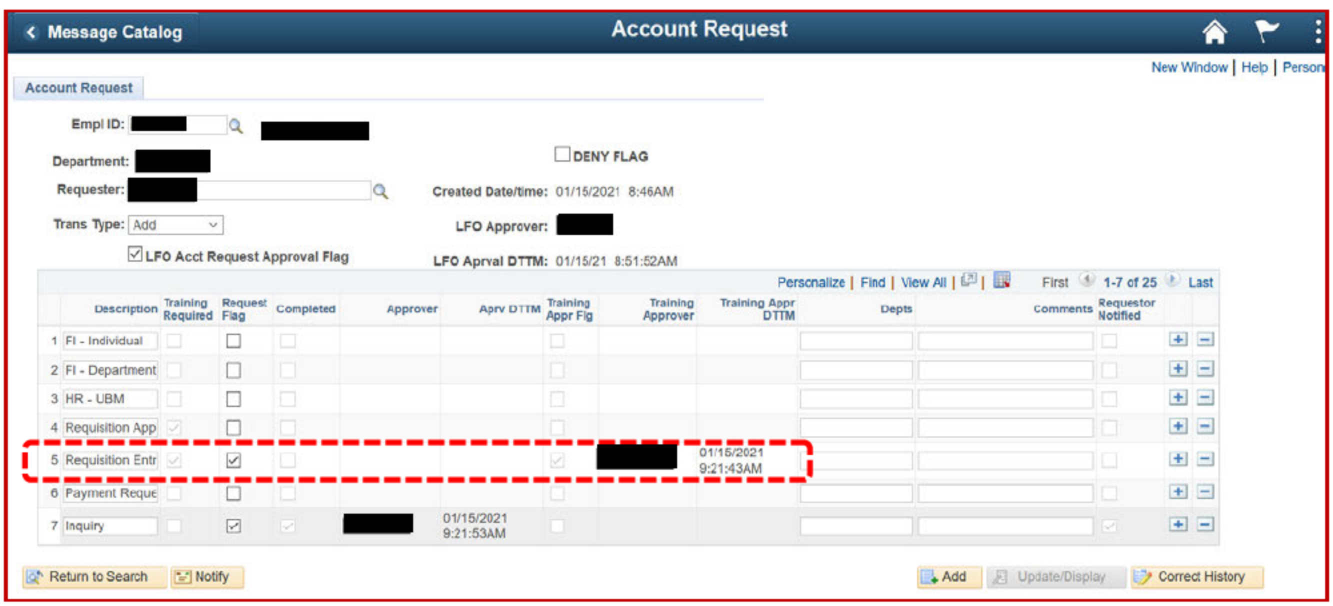


16. The email notification for ***Training Required*** line items, will go to the person who coordinates the training.

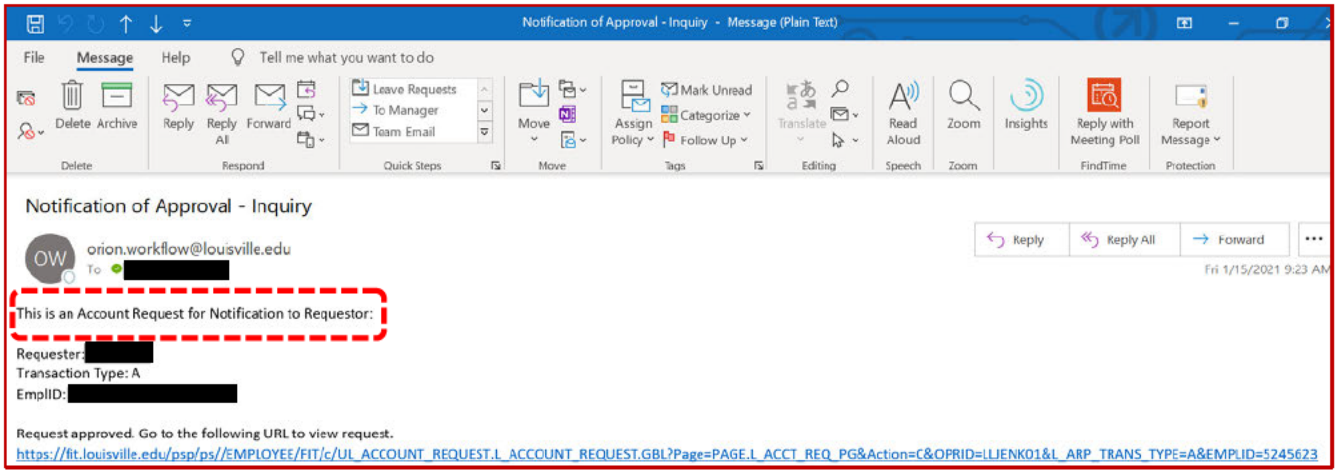
- The ***Approval*** box is available to be check as approved.
- Note that when the ***Training Required*** box is checked, the final approval check box is not available until the training ***Completed*** box has been checked:



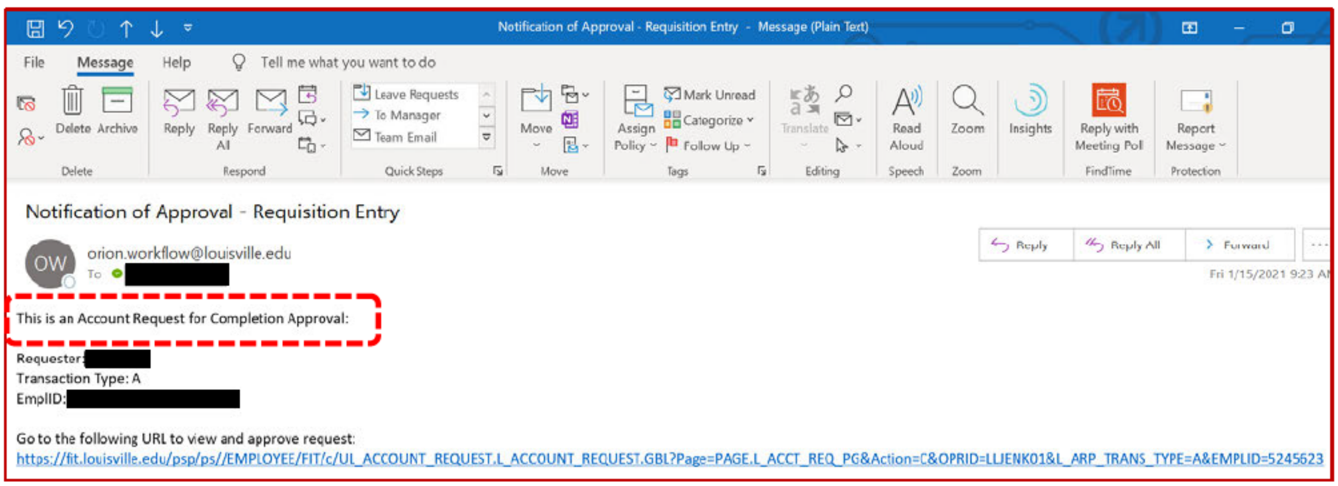
17. On the below example, once the ***Requisition Entry*** training is approved and the item "***Inquiry***" is complete, an email notification will be sent.



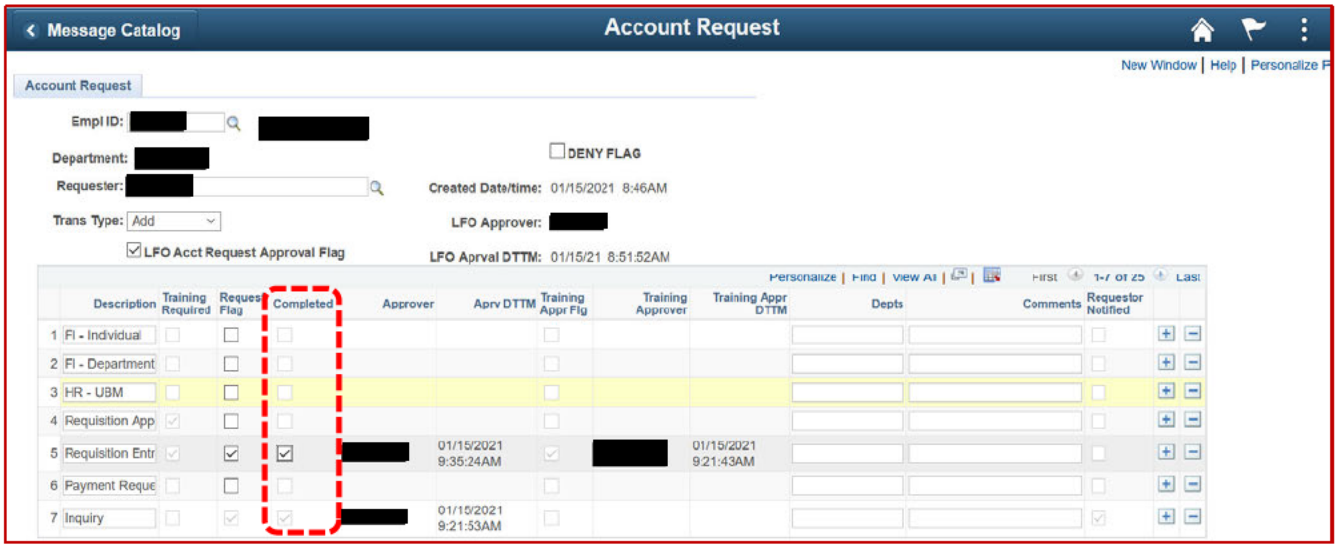
18. Email notification will be sent to requestor.



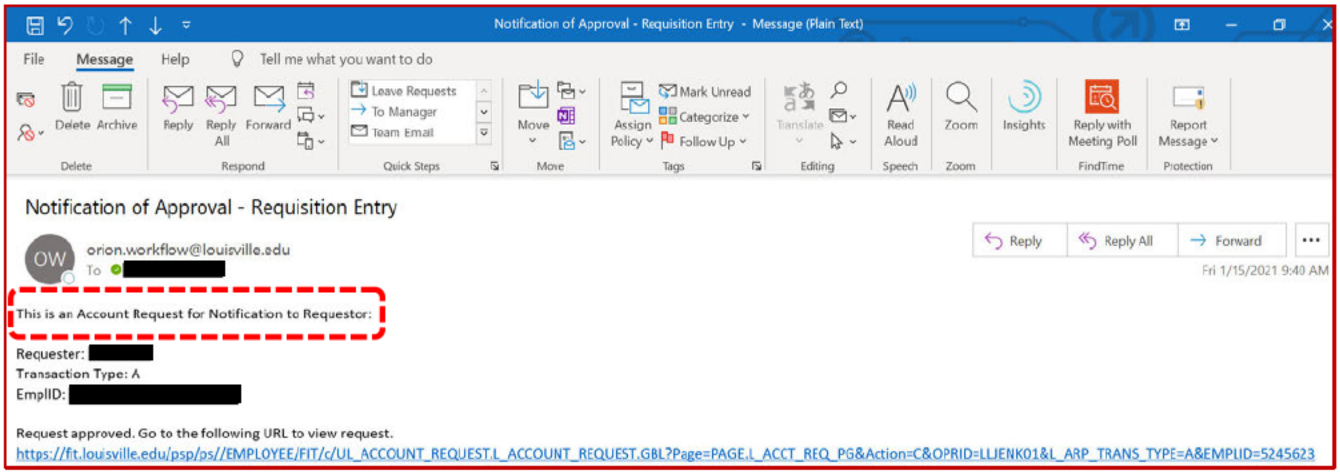
19. An email notification is also sent to the security administrator that training is completed for the ***Requisition Entry*** portion of the request.



20. The security administration will then add the appropriate security roles and check the ***Completed*** box.

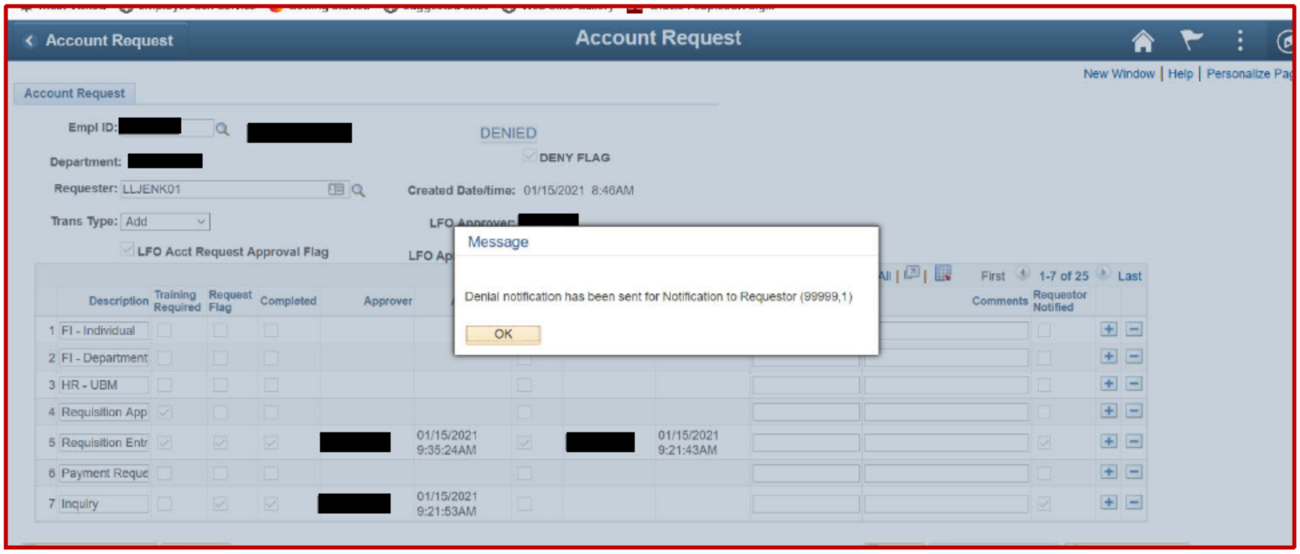


21. An email notification is then sent to original requestor that the ***Requisition Entry*** portion has been completed.



22. The above flow of email notifications will be sent when each line of the request is designated as ***Completed***, meaning the security roles have been added and the appropriate level of access has been given to the individual.

23. Notification is sent to original requester if LFO **denies** request:



24. Email notification sent to original requestor: