

Access Control Executive

Procedures Manual & Reference Guide

Project Portfolio Management & Delivery/Transition Solutions



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Introduction

IMS – Business Support Services have custodial responsibility for the management of all HSC administrative business systems; however, departments maintain the responsibility for authorizing user access to systems for the completion of daily operations.

Fulfilling this responsibility, each UTHSCSA department must designate an Access Control Executive (ACE). The ACE *must* be appointed by the Dean, Chair, or Director through the **Access Control Executive (ACE) Designation Form**.

What is an ACE?

The ACE has the responsibility to manage departmental users accessing administrative business systems including PeopleSoft applications, Document Review System (DRS), Data Warehouse (DW), Hyperion, and eShipGlobal. These systems contain sensitive data and information critical to HSC business processes. In addition to this critical function, the ACE serves as the official liaison between the departmental users, administrative departments, and IMS in the use of UTHSCSA administrative business systems.

Good internal control procedures provide the foundation for implementing secure administrative business systems. Therefore, it is required that the ACE be a senior member of the department: Dean, Chair, Director, Associate/Assistant Director, Administrator or the department's senior administrative position (provided the department's organization structure does not include an Associate/ Assistant Director or Administrator).

The ACE must be knowledgeable about the University policies and procedures, internal controls, and the department's business processes and organizational structure.

The **Access Control Executive (ACE) Designation Form** cannot be signed by anyone other than the Dean, Chair, or Director without approval from the Vice President and Chief Financial Officer.

Implementation of appropriate access controls to administrative business systems is critical to attainment of HSC's missions. Deans, Chairs, and Directors, as well as the designated departmental ACE to ensure departmental compliance should carefully review the ACE responsibilities listed in the next page.

Failure to comply could put business processes and information at risk.

ACE Responsibilities and Duties

The departmental ACE has the following responsibilities and duties:

- ❑ The ACE has the responsibility to assign appropriate security access to all application systems. Departmental users should be assigned access privileges based on job duties, or on a “need-to-know” basis. Additionally, the ACE must ensure approval cycles support appropriate separation-of-duties and good internal controls.
- ❑ The ACE has the responsibility to immediately terminate security access for an employee who has been terminated, transferred to another department, or no longer has a need to access administrative systems.
- ❑ The ACE is required to review the “User Security Access Departmental List”, at least annually, and provide a signed copy to their Dean, Chair or Director. Any access changes should be forwarded to IMS for implementation. To document the completion of required ACE training and system access verification, the department must maintain a current signed copy of the list.
- ❑ In the ACE’s absence, only a designated ACE Proxy, or the Dean, Chair, or Director may assume the responsibilities and duties of the ACE.
- ❑ The ACE is required to attend mandatory annual training.
- ❑ The ACE has the responsibility to ensure departmental personnel receive both formal systems training and training related to departmental procedures and accounts.
- ❑ The ACE serves as the official liaison between the department, administrative departments, and Information Management Services in the use of UTHSCSA’s administrative business systems. Access control actions requested by the ACE will be implemented by the Application Security team or the Transition Solutions team (formerly known as DCATS), a division of IMS.
- ❑ The ACE has the responsibility to maintain the electronic *Administrative Mailbox*, which is established for internal control of routine departmental business processes.
- ❑ The ACE has the responsibility to ensure personal computers accessing administrative business systems are properly secured.

Access Control Executive (ACE) Designation Procedure

To designate a departmental ACE, the Dean, Chair, or Director must scan and attach the completed and signed **Access Control Executive (ACE) Designation Form** upon submission of the request through the IMS Self Service Portal. The form must include the final signature from the VP & CFO.

The departmental ACE can also be the Technical Support Representative (TSR) and vice versa, the TSR can also be the departmental ACE.

1. To assign a new ACE, the department will need to complete the **ACE Designation form** and forward the signed form to the Vice President and Chief Financial Officer for approval.
 - ❑ It is the responsibility of the Vice President and Chief Financial Officer to grant or deny ACE nominations. The Vice President will then return the form to the departmental office.
 - ❑ After signatures are complete, the current ACE will scan and attach the ACE Designation Form to a service request on the IMS Self Service Portal.
 - ❑ The newly appointed ACE will be contacted to schedule initial ACE training. This training is required for NEWLY designated ACEs and is conducted one-on-one throughout the year.
 - ❑ This Initial ACE training includes a “technical” and “functional overview,” a review of current Departmental Security Access, and overview of the appropriate forms.
 - ❑ An ACE Checklist is signed after the new ACE has completed one-on-one training stating the new ACE has reviewed the current application user lists.
2. Only the Vice President and Chief Financial Officer may sign the **Access Control Executive (ACE) Designation Form** in place of the Dean, Chair, or Director.
3. When a new ACE is designated, the name of the former ACE will be removed from distribution lists and all ACE security access will be terminated immediately.
4. As a review of responsibilities and existing departmental access, each ACE is required to process ACE Annual Access Review documentation.
 - ❑ Mandatory Annual ACE training may be required and is completed through online training. This includes a “functional” overview, a review of current departmental security access, and overview of the appropriate forms.
 - ❑ The ACE training includes the following documentation:
 - ACE Procedure manual
 - Departmental User Security Access Confirmation List
 - Additional Process Guides as needed
 - ❑ Upon completion of the Mandatory Annual ACE review, the original forms for the Departmental User Security Access Confirmation List and the Mandatory Annual ACE Training Acknowledgement are to be signed, scanned, and attached by the ACE to an IMS Self Service portal request. Each department should maintain the original copies for their records.
5. Application Security is responsible to maintain signed & scanned copies of the ACE Designation Form and the Departmental User Security Access Confirmation List with the Security Access application. Departments are not required to submit an original hardcopy to the Application Security office.

ACE Proxy

Due to the Access Control Executive's (ACE) critical role to ensure the day-to-day operations of the department, it is imperative that the absence of the Access Control Executive (ACE) does not hinder or halt the department's ability to operate. If the Access Control Executive (ACE) is out of the office and modifications are necessary for a departmental user's access for any of the institutional administrative business systems, the Proxy has full authority to request the needed access by submitting an email to the Transition Solutions office at DCATS@UTHSCSA.EDU. When the Transition Solutions office receives the email request, a Service Request will be submitted to the appropriate back office personnel for completion.

Appropriate security measures should be followed for the institutional administrative business systems. The Proxy's limited responsibilities are listed below and should be reviewed carefully by the ACE Proxy, Departmental ACE, and Dean, Chair, or Director.

In the ACE's absence, the Proxy has the responsibility to request the appropriate security access to be granted, to the institutional business systems for the department personnel based on job duties, or a "need-to-know" basis.

The Departmental ACE should not abuse ACE Proxy responsibilities. This method of action should only be used if the Departmental ACE is on vacation or using sick/personal leave.

- ❑ The Proxy must email Transition Solutions with the request for access upon the ACE's absence.
- ❑ The Proxy must copy the Departmental ACE and Departmental Dean, Chair or Director in the email to Transition Solutions in the ACE's absence.
- ❑ A confirmation Reply To All email will be sent from Transition Solutions upon completion of the request.
- ❑ The Proxy cannot request to delete access to any of the institutional administrative applications during the ACE's absence.

- ❑ The Proxy may be required to take ACE training.

- ❑ The Proxy will agree to abide by the terms of all ACE Policies, including Transition solutions guidelines and the University's Handbook of Operating Procedures.

- ❑ The Proxy cannot access the ACE Tools or the PSAR form. It is against HOP Policy (5.8.4) for the ACE to share the domain username and password to allow a Proxy to access these menu items.

Security Access Password Procedure

Access to the Inside UTHSCSA Portal as well as the Document Review System (DRS), Data Warehouse (DW), Enterprise Analytics (EA) and Hyperion applications are controlled by the user's domain login password for the UTHSCSA domain. This password expires every 60 days and must be reset by the user online or by contacting the IMS Service Helpdesk at (210) 567-7777 option 1, to request the user's domain password to be reset. The user may also visit the IMS Service Desk walk-in locations on the San Antonio campus with a UTHSCSA ID badge.

The Scope of ACE Duties Administrative Business Systems at HSC

Administrative Mailboxes

UTHSCSA is utilizing a portion of the PeopleSoft enterprise system known as "workflow" to enhance the electronic document flow. Workflow generates an "FYI confirmation email" to support the business and approval processes for certain PeopleSoft transactions. These email messages are sent to the department's administrative mailbox and must be maintained for documentation purposes. The departmental ACE functions as the owner of the mailbox and uses Microsoft Outlook for administration. Training on how to appropriately set up and use the administrative mailbox is provided by the Transition Solutions team during ACE training.

Document Review System

The Document Review System (DRS) is a web-based application that allows authorized users to submit and approve documents entered supporting hours worked for part-time employees or overtime hours for salaried employees, as well as vacation and sick hours for employees and staff at the Health Science Center. At present, DRS provides access to time collection and leave accounting reports.

Data Warehouse

The Data Warehouse is a set of special databases containing institutional and departmental data. The Data Warehouse is accessed through a web-based software program and allows users to schedule and view pre-defined reports supporting daily operations and business decisions.

Employee Self Service

Employee Self Service is a PeopleSoft application that allows employees to access and/or update personal information 24/7 from any computer with an internet connection. Employees may also view all paychecks processed through the UTHSCSA payroll as well as selected benefits.

Enterprise Analytics

Enterprise Analytics is an Excel based Power Pivot analysis tool used to complete required business processes. There are five data analysis templates including Financial Review & Analysis, Payroll Review & Analysis, Encumbrances, Grants Review and Analysis, Variance Reporting, and Budget Planning.

eShipGlobal

eShip Global is the consolidated web-based shipping service used by UTHSCSA to process all letters and packages shipped via 3rd party carriers through Central Receiving. It is also available to departmental users for use within departments via the inside.UTHSCSA.edu portal.

Departmental users may use this application software to schedule shipments, print air bills from a local printer and receive competitive pricing on shipments including negotiated State rates. *eShipGlobal* provides shipping services for Federal Express, UPS and DHL (Airborne Express).

Facilities Management Systems

The FM Systems is designed to assist with the annual space review process. This system allows the HSC departments to conduct their space allocation review online.

Hyperion

The Hyperion application allows employees to access and/or update Budget Planning information from any computer with an internet connection.

Payment Request

The Payment Request is an automated Local Voucher/State Voucher processing system. It is designed to allow users to electronically generate, submit for processing/approval and track status of service and reimbursement voucher requests. This process is not for travel or purchase order payments.

Portal

The inside.UTHSCSA.edu portal serves as a gateway to a variety of resources and services, from organized content to applications, used at the Health Science Center.

PeopleSoft

PeopleSoft is a collection of software for administrative business systems.

PeopleSoft/Human Capital Management

The PeopleSoft HCM workflow process was implemented to assist users navigate through the various panels needed to make any changes to an employee record from the time of hire through termination.

PeopleSoft/Financials

The PeopleSoft Web Requisition is a web-based application developed to provide UTHSCSA with a uniform purchase requisition and a uniform method of processing requisitions. This process is for preparing an animal requisition, a basic purchase requisition, a general stores requisition, a direct connect requisition, or a travel requisition.

PeopleSoft /Student Administration

The Student Admin application covers the areas of Admissions, Student Records, Financial Aid, and Student Financials (tuition and fee billing and collection). Individuals make requests to Student Services for access to PeopleSoft Student Administration. In addition, the authorized point of contact who serves as liaison for the back office support, including the Registrar, Bursars and Financial Aid offices to make requests for access. Student Services reviews the request, completes a User Security Access Request form and attaches the form upon submission of a request through the IMS Self Service Portal for processing.

Access Control Procedures for UTHSCSA Business Systems

For access to the application systems, the departmental ACE is required to submit a Personnel Security Access Request (PSAR) form through the IMS Self Service Portal.

Please note: For security reasons, only the departmental ACE can submit the PSAR form. New and existing employees, who are not in the ACE role, do not have access to this form and should not attempt to complete this form.

- ❑ The PSAR form is located in the UTHSCSA portal intranet system under the IMS Self Service Portal.
<http://supportworks.win.uthscsa.edu/sw/selfservice/>
- ❑ If the ACE is on vacation or out on leave, a proxy should be designated to submit an email to obtain emergency access for new/existing users to the UTHSCSA business applications via email, copying the Dean Chair or Director and Dept ACE.
- ❑ To set up an ACE proxy, the ACE must complete, scan and attach an ACE Proxy Designation form through the IMS Self Service Portal.
- ❑ The ACE Proxy Designation form is located in the UTHSCSA portal intranet system under the ACE Webpage at:
http://ims.uthscsa.edu/technology_support/dcats_ACE.aspx

The intention of a proxy is NOT to allow the proxy to take on the responsibilities of the ACE. This alternative is for emergencies only and should not be abused.

Completing the Personnel Security Access Request (PSAR) form

****This request MUST be completed by the departmental ACE****

To complete the PSAR form, the ACE logs into the IMS Self Service portal using their domain ID and password, using the following link: <http://supportworks.uthscsa.edu/sw/selfservice/>

1. Click on My Services
2. Click on the plus (+) sign in front of the Accounts and Access Management section
3. For the Business Application Access section, click the Raise Request button
4. Type in the Employee ID for the user needing access
5. Type the Employee Name for the user needing access
6. Type the Department Name
7. Type the Dept ID
8. Type the Effective date for requested access change
9. Enter the Department ID(s) the employee will need access to. The ACE can only request access to the DeptID(s) they are owner of.

10. From the drop down arrow, select PSAR form

Select type of HSC Business Application Access



The image shows a screenshot of a dropdown menu. The menu is open, displaying a list of options. The top option is highlighted in blue and reads "-Select Choice-". Below it are the following options: "ACE/ACE Proxy", "PeopleSoft Student Administration", "PSAR", "RAHC Portal", and "UT Police".

The following listings are not an option to select unless the ACE is in one of these departments:

- ❑ RAHC – For RAHC employees/student in the valley
- ❑ UT Police – For UT Police Employees

The form will guide the ACE through all Business Applications. Select N/A, Add, Delete or Transfer (if applicable) for all that applies. An option must be selected for every business application. If access for an application is not requested, select N/A, the section cannot be left blank.

Continue to click on Next until the request has been completed. Click the Submit button and receive a system generated request number.

At this point, the ACE will also have the option to attach a file, or document to the request.

Your request has been logged (F0079721)

Thank you. Your request has been logged, with a Reference of **F0079721**.

To assist us in providing you with a quick response to any future enquires you may have regarding this matter, please keep a note of the above reference. If you call our support hotline on 210-567-7777 to check the status of your call, you will be asked for this reference.

File Attachment

If you have any files, such as business documents, log files or screenshots, that will help the support team expedite your request you can attach them using the below form.

The request will automatically be submitted for processing.

The ACE will receive an IMS Support Works confirmation email when the request is complete.

Requesting/Granting Security Access to Application Systems

Blanket Travel Authorizations

University policy requires all departments to complete a PeopleSoft travel requisition for faculty, staff, interns, students and residents for all travel on University time or business away from the individual's headquarters city when such travel will occur during an employee's normal working hours.

To authorize individuals on Blanket Travel, the Access Control Executive (ACE) will go to Blanket Travel Authorizations within PeopleSoft Financials. Updates made within the Blanket Travel Authorization page are reflected within the public inquiry, found within HSC Self Service Inquiry, Blanket Travel Inquiry. Only the departmental ACE has update authority.

A Travel Requisition is not needed for Blanket Travel since Authorization is granted via the Blanket Travel Authorization page. Authorization is dependent on the **home** department for a user. Once the home department selects a user for Blanket Travel, the individual is authorized for **any** department. For example, if an authorized individuals' home department is T6800, but goes on a trip for T7100, this person is authorized to travel for any department. On the reimbursement for this person, the voucher should have the PID the expense is going to be charged to. If the travel occurred on a DeptID other than the Home DeptID, the home DeptID should be listed on the voucher right after the word "Blanket" in the Travel RQ box. (ex. Blanket – T6800)

1. Go to PeopleSoft Financials
 - a. HSC Custom Components
 - b. Blanket Travel Authorizations
 - c. Add a New Value
 - d. Enter the Business Unit, Department ID and Budget Period
 - e. Click Add

Blanket Travel Authorizations

Find an Existing Value | **Add a New Value**

Business Unit: HSCSA

Department: T5700

Budget Period: 2011

Add

[Find an Existing Value](#) | [Add a New Value](#)

2. Click the Select Employees button to choose the employee(s) who will be authorized for Blanket Travel reimbursements:

Blanket Travel Authorizations

Business Unit HSCSA Department T6700 Budget Period 2011

Select Employees

Employee ID	Name	Job Title	Eff Date	Status
1				

3. Click the Select All hyperlink or choose individual employees for authorization.
4. Click the Copy Selected Lines button
5. Click Save

The employees selected will appear on the HSC Self Service Inquiry – Blanket Travel Inquiry. This authorization will be effective for the entire fiscal year. The departmental ACE must add users to Blanket Travel Authorization every fiscal year.

Once the page is saved, rows cannot be deleted. For employees no longer employed by the department or for whom a blanket authorization is no longer required, the ACE can change the status for the employee’s blanket authorization to Inactive.

Transfer Employees

If an employee transfers to another department, the departmental ACE where the employee transferred **INTO** must add the employee to the new departments’ blanket travel authorization list. The employee will not automatically be removed from the departments’ list they transferred **OUT** of. If the losing department wants to remove the employee’s name from displaying in the department listing, the ACE can change the status to “Inactive”. The department the employee transferred out of will still see the employee ID from the listing; however, the name will not show.

Click Save after making any changes to the current view.

Blanket Travel Authorizations

Business Unit HSCSA Department T6800 Budget Period 2015

Select Employees

Employee ID	Name	Description	Eff Date	Status
1 014315	Yanes, Maria L	Web Specialist	09/05/2014	A
2 026048	Dyer, Jeffrey W	Business Systems Analyst-Sr	09/05/2014	A
3 030627	Reagan, Christy K	IT Project Manager -Sr	09/05/2014	A
4 036359	Menn, Bryan P	Manager, PMO	09/05/2014	A
5 041232	Schickedanz, Sherlie M	ERP Programmer-Lead	04/21/2015	A
6 055148			09/05/2014	I
7 055739	Bruns, Dalin A.	IT Project Manager-Assoc	09/05/2014	A

Save Return to Search

Department Assigned Manager

The departmental ACE has authority to edit this field for NON-Grant PIDs where the field has a magnifying button. This page was developed to provide departments with a way to assign a Department Manager for display only, in Enterprise Analytics templates. This field is optional, and will upload into EA for filtering, sorting and grouping functions.

ACEs cannot edit the field if the PID is a Grant. The Project Contract field will be grayed out and will begin with zero. Changes for these PIDs are completed by the Office of Sponsored Programs.

ACEs cannot edit the field if the PID is an Endowment. The Project Contract field will be grayed out and will begin with E57. Changes for these PIDs are completed by the Endowments office.

An ACE can update the manager field for Project ID's belonging to any department for which the ACE has authority over.

1. Go to PeopleSoft Financials
 - a. HSC Custom Components
 - b. Security
 - c. Dept Assigned Manager
2. Click the Search button to view all DeptIDs in the ACEs ownership
3. Click a DeptID to view all active PIDs for the selected Department
4. Enter a last name and a portion of the first name, click the Lookup button. The search results will give a listing of ALL active employees. Select a name from the search results
5. Click on Save to preserve the update

Departmental ACEs should be aware:

- Entering a name on the Dept Assigned Manager field will not update the Project Manager anywhere else in PeopleSoft.
- Entering a name on the Dept Assigned Manager field will not grant the user PeopleSoft Approver access.
- Entering a name on the Dept Assigned Manager field will not infer or grant any privileges or authority (such as signature authority)

The use of this field is solely for Enterprise Analytics (EA) reporting.

Data Warehouse (DW)

The Access Control Executive (ACE) submits a PSAR (Personnel Security Access Request) form to request security access to Data Warehouse/SSRS for a specific user. This user will be running reports and reconciling accounts for the department. The ACE submits the PSAR form for processing through the IMS Self Service portal.

1. If requesting the user have access to the HR Pay Listing report, the radio button in the Data Warehouse section of the PSAR form should be checked. This access is necessary if the user will also need EA-Payroll access.
2. A request will be sent to the IMS Application Security team for processing.
3. There is no mandatory training prior to access being granted for the DW/SSRS application by the IMS Application Security team, however the new user is instructed to view the Transition Solutions webpage and review all training resources.
4. The ACE is notified via Team Dynamix email when the access is complete. All necessary distribution lists and the Department User Security Access Confirmation Lists are updated. *It is suggested the departmental ACE also update the departmental list as changes occur.*

Document Review System (DRS)

The Access Control Executive (ACE) submits a PSAR (Personnel Security Access Request) form to request security access to the Document Review System for a specific user. This user will be entering or approving part-time hours worked in Time Collection and/or sick/vacation hours in Leave Accounting.

1. The ACE submits the PSAR form for processing through the IMS Self Service portal.
 1. If requesting access for a new preparer, also list the current approver's name
 2. If requesting access for a new approver, also list the current preparer's name

- There is no mandatory training prior to access being granted for the DRS application by the IMS Application Security team, however the new user is instructed to view the Transition Solutions webpage and review all training resources. Ad-hoc classes or training via phone may be scheduled if necessary. Contact Transition Solutions for assistance.
- The ACE is notified via Team Dynamix email when the access request is complete. All necessary distribution lists and the Department User Security Access Confirmation Lists are updated. *It is suggested the departmental ACE also update the departmental list as changes occur.*

Enterprise Analytics (EA)

The Access Control Executive (ACE) submits a PSAR (Personnel Security Access Request) form to request security access to Enterprise Analytics for a specific user. This user will be accessing the EA templates to perform analysis for the department. EA access will allow a user to view Financials Review & Analysis, Payroll Review & Analysis, Encumbrances, Grants Review & Analysis, Variance Reporting, and Budget Planning.

- The ACE submits the PSAR form for processing through the IMS Self Service portal.
- A request will be sent to the IMS Application Security team for processing.
- There is no mandatory training prior to access being granted to the EA templates by the IMS Application Security team, however the new user is encouraged to complete the EA training modules in Knowledge Center.
- The ACE is notified via Team Dynamix email when the access is complete. All necessary distribution lists and the Department User Security Access Confirmation Lists are updated. *It is suggested the departmental ACE also update the departmental list as changes occur.*

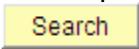
For users who need access to payroll information, the Departmental ACE must request this access in the PSAR form.

- EA Payroll Review & Analysis – Granting a user access to EA Payroll Review & Analysis will allow the user to view Payroll data. Access for the payroll template should be notated in the EA comment box on the PSAR form. The ACE will also need to check off the “HR Pay Listing” box in the Data Warehouse section of the PSAR form.

eShipGlobal

The Access Control Executive (ACE) will go to the Security page within ACE Tools/ACE Security to authorize security access to eShip Global system for a specific user. This user will ship items for the department.



1. Go to HSC Business Applications
 - a. ACE Tools
 - b. ACE Security
2. Enter a portion of the operator's last name or complete last name and click the  button.
3. The departmental ACE will add a Department ID within the User Access tab and select the eShip Global checkbox.
4. Click the SAVE option.
5. There are no required classes to attend for eShipGlobal access before security access is granted. It is recommended the user review online training at the following link: http://www.uthscsa.edu/business/avp/ESHIPGLOBAL/Training_Video.wmv
6. To access the Training Guide visit the following link: http://www.uthscsa.edu/business/avp/ESHIPGLOBAL/eShipGlobalNew_training_document_updated.doc
All necessary distribution lists and the Department User Security Access Confirmation lists are updated. *It is suggested the departmental ACE also update the departmental list as changes occur.*

For any questions related to shipping contact Jarrod Fischer at 210/567-5998 or fischerjt@uthscsa.edu

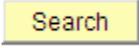
Hyperion

The Access Control Executive (ACE) submits a PSAR (Personnel Security Access Request) form to request security access to Hyperion for a specific user. This user will be making changes in the Hyperion Planning module to include entering Non-Salary numbers, Projection numbers, and projecting the budget for the next fiscal year.

1. Before the ACE submits a PSAR form for Hyperion access, they must first obtain approval from their EC office to add/delete Hyperion access for a user. This email showing EC approval, **should be attached** to the IMS Self Service request submitted when the ACE requests Hyperion access for a user.
2. The ACE submits the PSAR form for processing through the IMS Self Service portal. **The EC approval email must be attached before Hyperion access is processed.**
3. The user should review all online tutorials prior to access being granted. In Knowledge Center, the user should review the following courses:
 - a. Hyperion Budgeting
 - b. Hyperion Reporting
 - c. Position Budgeting in HCM
4. If the user will be installing the Smart View application add-on, they must be pre-approved by the Budget office and the EC office. The user must then review the following courses:
 - a. Introduction to Hyperon Smart View
 - b. Gaining Smart View Aptitude
5. The ACE is notified via Team Dynamix email when the access is complete. All necessary distribution lists and the Departmental User Security Access Confirmation Lists are updated. *It is suggested the departmental ACE also update the departmental list as changes occur.*

Payment Request

The Access Control Executive (ACE) will add Payment Request access at their discretion and on a “need to know” basis for the user. This user will be preparing or approving online payment requests.

1. The ACE logs into the UTHSCSA Portal
 - a. HSC Business Applications
 - b. ACE Tools
 - c. ACE Security
2. Enter a portion of the operator’s last name or complete last name and click the  button.
3. The departmental ACE should refer to “[Requesting and Setting up a New Operator](#)” for detailed steps on adding payment request user access.
4. Click the SAVE option.
5. The ACE should instruct the user to complete online training before the user attempts to prepare or approve payment requests.
All necessary distribution lists and the Departmental User Security Access Confirmation Lists are updated. *It is suggested the departmental ACE also update the departmental list as changes occur.*

PeopleSoft Human Capital Management (HCM)

The Access Control Executive (ACE) submits a PSAR (Personnel Security Access Request) form to request security access to the PeopleSoft HCM for a specific user. This user will be making changes in the HR area to include terminations, job maintenance and salary changes.

1. The ACE submits the PSAR form for processing through the IMS Self Service portal.
2. Mandatory training must be completed before access is granted. Upon completion, a request is assigned to the IMS Application Security team for processing.
3. The ACE is notified via Team Dynamix email when the access is complete.
All necessary distribution lists and the Departmental User Security Access Confirmation Lists are updated. *It is suggested the departmental ACE also update the departmental list as changes occur.*

PeopleSoft Student Administration

The Access Control Executive (ACE) or assigned liaison, submits the User Security Access Request form to request security access to the PeopleSoft Student Administration for a specific user. This user will be accessing the Student Services menu options.

1. The assigned liaison(s) submits the request through the IMS Self Service portal. For Student Admin access, Lisa Serna and Ellen Nystrom are authorized to submit these requests.
2. A **User Security Access Request form** (hardcopy request form), is scanned and attached to the request.
3. Security access is completed by the IMS Application Security team and then notification is sent to the assigned liaison(s) (Lisa Serna and Ellen Nystrom) via Team Dynamix email.

All necessary distribution lists and the Departmental User Security Access Confirmation Lists are updated. *It is suggested the departmental ACE also update the departmental list as changes occur.*

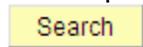
Important note: For security reasons, the User Security Access Request form can only be submitted through the authorized liaison for Student Admin access. New or existing employees who are not listed as a liaison should not complete this form.

PeopleSoft Web Financials Web Requisition

The Access Control Executive (ACE) will add Financials access at their discretion and on a “need to know” basis for users. This user will be preparing or approving online web requisitions.

1. The ACE logs into the UTHSCSA Portal
 - a. HSC Business Applications
 - b. ACE Tools
 - c. ACE Security

Enter a portion of the operator’s last name or complete last name and click the



button.

2. The departmental ACE should refer to the section “[Requesting and Setting up a New Operator](#)” for detailed steps on adding Financials user access.
3. Click the SAVE option.
4. There is no mandatory training prior to access being granted for Financials by the department ACE, however the new user is instructed to view the Transition Solutions webpage and review all training resources.
All necessary distribution lists and the Departmental User Security Access Confirmation Lists are updated. *It is suggested the departmental ACE also update the departmental list as changes occur.*

Terminating Security Access to Application Systems

The ACE has the responsibility to **immediately terminate** security access for an employee who has terminated, transferred from the department, or no longer has a need to access administrative business systems for the department.

Termination of security access to PeopleSoft, Document Review System, Data Warehouse, Enterprise Analytics and Hyperion is performed by the IMS Application Security team. The ACE should complete the PSAR form through the IMS Self Service portal at the time a user is terminated or transferred from the department.

The ACE should remove all PeopleSoft Financials requisition authorization roles, to include Department ID’s and Project ID’s, found within the ACE Security pages (User Access, Department Approver and Project Approver) in People Soft Financials for employees who have terminated from the department.

ACEs cannot remove access from a Principal Investigator who oversees an active grant without additional assistance from the Office of Sponsored Programs. To terminate a Principal Investigator (P.I.) from a grant Project ID (PID), the ACE should complete the following steps in the order they are listed:

1. Contact the Office of Sponsored Programs (OSP) and request Sponsored Programs delete the P.I.'s user name from the Project ID. They should replace the PREVIOUS P.I. with the NEWLY appointed P.I.
2. The ACE can then remove the user name from the Project ID(s) in the ACE Tools.

Please note: The ACE can only remove access from the PI once OSP has completed their part and disconnected the PI from the PID or grant by replacing the “old” P.I. name with a “new” P.I. name. If the P.I. will remain on the grant, access cannot be removed.

It is the responsibility of the departmental ACE to confirm emails of a terminated employee. The ACE has 10 days to submit a service request to retain the listed accounts if it is incorrect.

Do not ignore these emails

PeopleSoft Financials Requisition Security

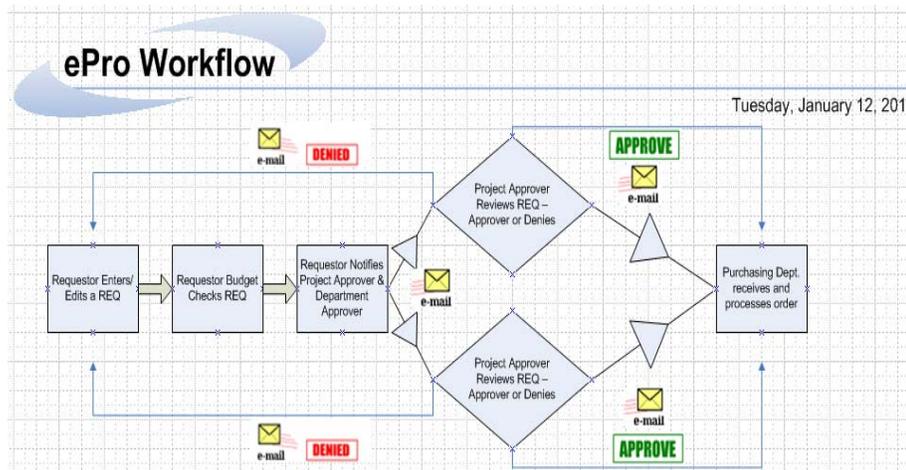
The ACE has the responsibility to set up and maintain requisition and payment request authorizations for the PeopleSoft Financials web-client for front-office users. The intent is to provide details about the setup for UT Health San Antonio for Preparers and Project and Department Approvers, and the ability for the ACE to make updates directly for the majority of the financials authorization requests.

The major processes reviewed are:

- ❑ Review typical roles
- ❑ Review Department ID Security
- ❑ Requesting and Setting up a New Operator
- ❑ Updating an Operator Profile/Adding Access
- ❑ Updating an Operator Profile/Deleting Access

Typical Roles

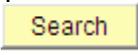
The chart below depicts the 3 roles (Requestor, Department Approver and Project Approver) that are common amongst financial front-office users.

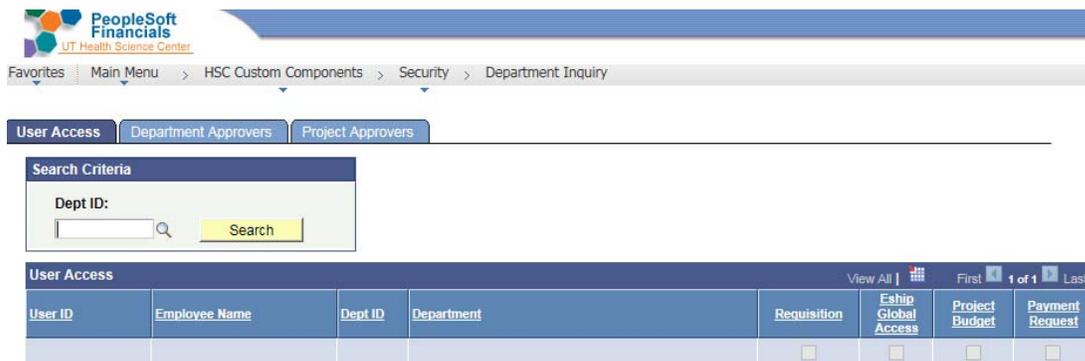


- ❑ A **Requestor** (Preparer) has the capability to enter requisitions or payment requests in the system. A requestor is designated at the department level.
- ❑ A **Department Approver** is the equivalent to a reviewer role. The Department Approver is associated with a department id.
- ❑ A **Project Approver** is the equivalent of the authorized signature approval. It is associated with a particular project ID.

Review Department ID Security

In order to assist the ACE in maintaining the Requisition Authorization information, the Department Inquiry page will allow the ACE to review the current setup for an entire department. The Department Inquiry pages can be accessed via the Portal in the ACE Tools folder.

1. Go to HSC Business Applications
 - a) ACE Tools
 - b) Department Inquiry
2. Log into ACE Tools and select Department Inquiry, click on the  icon to view ALL DeptID's the ACE owns.
3. To search for a specific department, enter a portion of the department ID and click the magnifying glass icon, or enter the full DeptID and click the  button.



The Department Inquiry will show the ACE all Financials Requestors, Department Approvers, and Project Approvers for that department.

This is a “view only” page. To make edits to a user’s access, the ACE will go to ACE Security and search for the user’s profile.

User Access tab

The checkboxes on the User Access tab will identify the Financials access the user has:

- Requisition – if checked, the user can prepare financials requisitions
- eShip Global access – If checked, the user can ship packages for the department
- Project Budget – If checked, the user can review data for PID's in the PBI inquiry
- Payment Request – If checked, the user can prepare or approve payment requests

The ACE can also search by clicking the magnifying glass icon to view a listing of Department ID's within the ACE's ownership. This list can be exported into an Excel spreadsheet by clicking the download icon. Use the left and right arrows to navigate through the pages.

User ID	Employee Name	Dept ID	Department	Requisition	Esbo Global Access	Project Budget	Payment Request
BRUNSD	Bruns,Dalín Arthur	T6800	Proj Portfolio Mgmt & Delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CARTEE	Cartee,Brian	T6800	Proj Portfolio Mgmt & Delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CASH	Cash,Deborah C	T6800	Proj Portfolio Mgmt & Delivery	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
COLLIERY	Collier,Yeman	T6800	Proj Portfolio Mgmt & Delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
GAEKE	Gaeke,Misty Ann	T6800	Proj Portfolio Mgmt & Delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
KYLEJ	Kyle,Jacquelyn A	T6800	Proj Portfolio Mgmt & Delivery	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
MENNB	Menn,Bryan P	T6800	Proj Portfolio Mgmt & Delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PENAC2	Pena,Claudia E	T6800	Proj Portfolio Mgmt & Delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
REYNAGA	Reyna,Gloria A	T6800	Proj Portfolio Mgmt & Delivery	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
REYNAMT	Reyna,Maria T	T6800	Proj Portfolio Mgmt & Delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
RIME	Rime,Sherry	T6800	Proj Portfolio Mgmt & Delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
RODRIGUEZCM	Rodriguez,Cindy M	T6800	Proj Portfolio Mgmt & Delivery	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Department Approver Access tab

The checkboxes on the Department Approver Access tab will identify the Financials access the user has:

- Requisition – If checked, the user can approve financials requisitions.
- Payment Request – If checked, the user can approve payment requests.

User ID	Name 1	Dept ID	Department	Requisition
CARTEE	Cartee,Brian	T6800	Proj Portfolio Mgmt & Delivery	<input checked="" type="checkbox"/>
COLLIERY	Collier,Yeman	T6800	Proj Portfolio Mgmt & Delivery	<input checked="" type="checkbox"/>
MENNB	Menn,Bryan P	T6800	Proj Portfolio Mgmt & Delivery	<input checked="" type="checkbox"/>
RIME	Rime,Sherry	T6800	Proj Portfolio Mgmt & Delivery	<input checked="" type="checkbox"/>

The ACE can also search by clicking the magnifying glass icon to view a listing of Department ID's within the ACE's ownership.

- Select the Dept ID then click on Search to view a listing of users who have access to that Dept ID and the user's access.

This list can be exported into an Excel spreadsheet by clicking the download icon. Use the left and right arrows to navigate through the pages.

Project Approver Access tab

The checkboxes on the Project Approver Access tab will identify the Financials access the user has:

- Signature Authority – If checked, the user can approve paper documents
- Requisition – If checked, the user can approve financials requisitions online

PROJECT ID	Project Title	FUND	DEPT ID	DEPARTMENT	STATUS	Signature Authority	Requisition	User ID	Employee Name
151388	Proj Portfolio Mgmt & Delivery	14001	T6800	Proj Portfolio Mgmt & Delivery	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	MENNB	Menn, Bryan P
151388	Proj Portfolio Mgmt & Delivery	14001	T6800	Proj Portfolio Mgmt & Delivery	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	RIME	Rime, Sherry
151388	Proj Portfolio Mgmt & Delivery	14001	T6800	Proj Portfolio Mgmt & Delivery	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	RODRIGUEZCM	Rodriguez, Cindy M
151447	PPMD Service Dept Funds	21001	T6800	Proj Portfolio Mgmt & Delivery	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	MENNB	Menn, Bryan P
151447	PPMD Service Dept Funds	21001	T6800	Proj Portfolio Mgmt & Delivery	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	RIME	Rime, Sherry
151447	PPMD Service Dept Funds	21001	T6800	Proj Portfolio Mgmt & Delivery	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	RODRIGUEZCM	Rodriguez, Cindy M
151611	PS HCM PROJECT UPGRADE	63105	T6800	Proj Portfolio Mgmt & Delivery	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	MENNB	Menn, Bryan P
151611	PS HCM PROJECT UPGRADE	63105	T6800	Proj Portfolio Mgmt & Delivery	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	RIME	Rime, Sherry
152164	PPMD-Future Initiatives	23001	T6800	Proj Portfolio Mgmt & Delivery	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	MENNB	Menn, Bryan P
152164	PPMD-Future Initiatives	23001	T6800	Proj Portfolio Mgmt & Delivery	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	RODRIGUEZCM	Rodriguez, Cindy M
155864	Velos CTMS Implementation	23001	T6800	Proj Portfolio Mgmt & Delivery	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	BRUNSD	Bruns, Dalin Arthur
155864	Velos CTMS Implementation	23001	T6800	Proj Portfolio Mgmt & Delivery	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	MENNB	Menn, Bryan P

This list can be exported to an Excel spreadsheet by clicking the download icon. Use the left and right arrows to navigate through the pages.



The ACE can also search by any of the following options:

- Dept ID field – Enter the Department ID or click the magnifying glass icon to view a listing of Dept ID's within the ACE's ownership. Select a Dept ID and click on search to view a listing of users who have access to that Dept ID.
- User ID field – Do not use this field.
- Employee Name – Enter the user's last name or click on the magnifying glass icon to view a listing of users who have access to the ACE's PID's. Select the user and click on search to view PID's they can approve on
- Click on Clear Search to clear all data from the Search Criteria box and begin a new search.

Other Information Sources

The information displayed on the Project Approver page may also be found in the HSC Self Service Inquiries within the Financials application.

The “Signature Inquiry by Project Approver” within the Self Service Inquiries link can be used to view all Project ID’s for a Project Approver regardless of department. This list of projects shows the current projects with the “Active” status.

The ACE will see the same information within the Self Service Inquiries, “Signature by Project” and “Signature by Project Approver”.

- **Signature by Project** will allow the ACE to search for approvers by entering the PID.

PeopleSoft Financials
UT Health Science Center

Favorites | Main Menu > HSC Self Service Inquiries > Signature by Project

Signature Inquiry by Project
Enter any information you have and click Search. Leave fields blank for a list of all values

Find an Existing Value

Search Criteria

Project: begins with []

Description: begins with []

Search Clear Basic Search Save Search Criteria

- **Signature by Project Approver** will allow the ACE to search for approvers by entering the name.

PeopleSoft Financials
UT Health Science Center

Favorites | Main Menu > HSC Self Service Inquiries > Signature by Project Approver

Signature Inquiry by Prj Appvr
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Project Manager: begins with []

User ID: begins with []

Empl ID: begins with []

Case Sensitive

Search Clear Basic Search Save Search Criteria

Requesting and Setting up a New Operator

Navigation

To begin the setup of a new PeopleSoft Financials web requisition user, the departmental ACE must first locate the individual within the ACE Security page. Specific operator roles, which are predefined, provide the user access to certain menu roles within PeopleSoft Financials. The ACE will need to unlock the individual's account to activate the profile and assign user roles, to include Dept ID's and Project ID's, needed for the user to perform their job duties.

When viewing Financials access for a user, the page is broken up into multiple security access tabs in the ACE Security/ACE Tools menu. A closer view of each section is discussed in the following pages.

PAGE VIEW

The screenshot shows the 'User Access' tab of the ACE Security page. The page is annotated with four sections:

- Multiple Security Access tabs:** Points to the top navigation tabs: ACE Departments, User Access, Department Approvers, and Project Approvers.
- Section 1 – Header tabs:** Points to the user information header containing fields for User ID, Email ID, Empl ID, and Account Locked Out? with an 'Add Operator' button.
- Section 2 – Action box:** Points to the 'User Access Actions' section containing 'View Existing', 'Add', and 'Delete' buttons.
- Section 3 – Filter and Search Criteria box:** Points to the 'Filter and Search Criteria' section containing a search box for DEPT ID, a search button, and a clear button.
- Section 4 – Access Data box:** Points to the 'Existing Departments and User Access' table.

DEPT ID	DEPARTMENT	eShip Global	Requisition	Project Budget	Payment Request
G1700	Physiology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
G2000	Grad Sch Physiology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Section Information

Section 1 – The Header tabs

In the new ACE Security enhancements, access for a user will be broken up in multiple separate access tabs to simplify the task of granting access.

Depending on the TYPE of Financials access a user needs (User, Department Approver, Project Approver), the ACE selects appropriate tab to complete the access. The ACE will only be able to add, change and delete information for the departments under the ACE's authority.

An ACE can **only** unlock a **NEW** user profile by clicking on the yellow Add Operator button. This action will automatically unlock the NEW user's profile and allow the ACE to add PeopleSoft Financials access as deemed necessary for the user by selecting an action from the User Access Actions section.

Multiple ACEs can maintain a single Requestor's profile if the operator has requestor and/or approver functions across different departments. This restriction will prevent unauthorized or accidental modification that could negatively affect the business processes.

The screenshot shows the 'User Access' tab selected. The user details are as follows:

User ID:	06220000	Requestor/Approver:		Empl ID:	061735
Email ID:	psfin@uthscsa.edu	Account Locked Out?:	<input checked="" type="checkbox"/>	Add Operator:	

The 'Add Operator' button is highlighted with a red box.

Additionally, if the user profile is locked, the "Add" button will be grayed out to prevent altering to the current security access set up for this profile.

The screenshot shows the 'User Access' tab selected. The user details are as follows:

User ID:	RODRIGUEZBA Rodriguez, Brittany A	Empl ID:	061735
Email ID:	RODRIGUEZBA@uthscsa.edu	Account Locked Out?:	<input checked="" type="checkbox"/>

The 'Add Operator' button is highlighted with a red box. Below this, the 'User Access Actions' section is visible, containing three buttons: 'View Existing', 'Add', and 'Delete'. The 'Add' button is highlighted with a red box and is grayed out.

Section 2 – The Action box

In the Action box, the ACE can choose what type of action (View, Add, Delete) to take for a user's Financials access. Each tab has the Action box section; the ACE **should confirm** the appropriate tab based upon the type of Financials access needed.

ACE Departments | **User Access** | Department Approvers | Project Approvers

User ID: psf1000 Email ID: psf1000@ncscsa.edu Empl ID: 1000000000
 Account Locked Out?: [Add Operator](#)

User Access Actions

[View Existing](#) [Add](#) [Delete](#)

Filter and Search Criteria

DEPT ID: [Search](#) [Clear](#)

[Select All](#) [Clear All](#) [Select All](#) [Clear All](#) [Select All](#) [Clear All](#) [Select All](#) [Clear All](#)

Existing Departments and User Access

DEPT ID	DEPARTMENT	eShip Global	Requisition	Project Budget	Payment Request
G1700	Physiology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
G2000	Grad Sch Physiology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Save](#) [Return to Search](#)

User Access Actions box from User Access tab

User Access Actions

[View Existing](#) [Add](#) [Delete](#)

Department Approvers Action box from Department Approvers tab

Department Actions

[View Existing](#) [Add](#) [Delete](#)

Project Approvers Action box from Project Approvers tab

Project Actions

[View Existing](#) [Add](#) [Delete](#)

Section 3 – The Filter and Search Criteria box

In the Filter and Search Criteria, the ACE is able to search for a listing of available options to add to the user's profile.



By typing in a portion of the Dept ID, PID, Fund or Project title and clicking the magnifying glass icon, a list of criteria that matches the parameters entered will populate in the Access Data box.

ACE Departments | **User Access** | Department Approvers | Project Approvers

User ID: [text] Email ID: [text]
 Empl ID: [text] Account Locked Out?: [checkbox]
 Add Operator

User Access Actions
 View Existing Add Delete

Filter and Search Criteria
 DEPT ID

 Search Clear

Select All Clear All Select All Clear All
 Select All Clear All Select All Clear All

Existing Departments and User Access First 1 of 2 Last

DEPT ID	DEPARTMENT	eShip Global	Requisition	Project Budget	Payment Request
G1700	Physiology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
G2000	Grad Sch Physiology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save Return to Search

The User tab and Department Approver tab view of this section:

Filter and Search Criteria

DEPT ID

 Search Clear

The Project Approver tab view of this section:

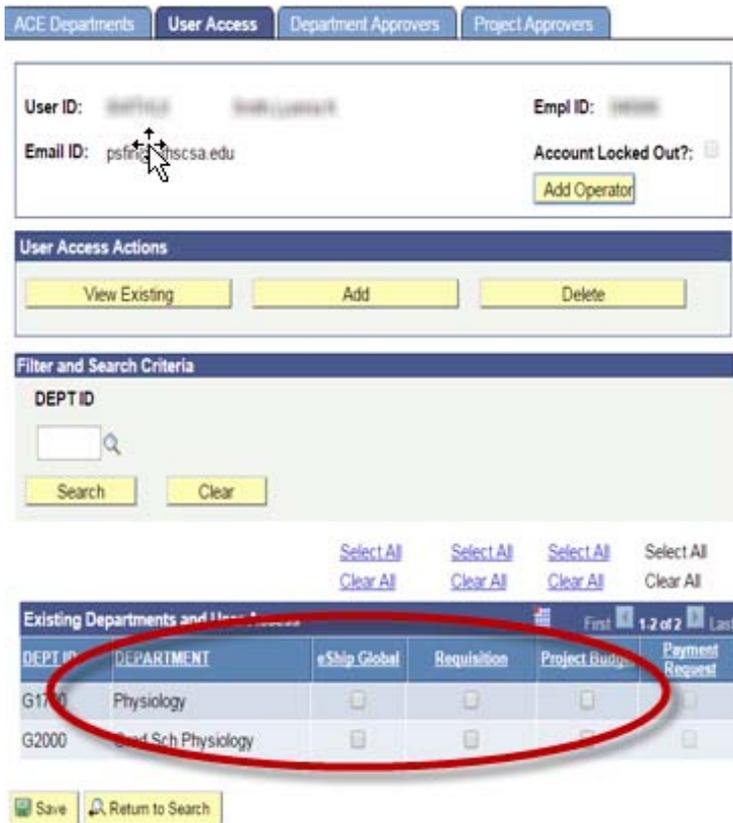
Filter and Search Criteria

PROJECT ID FUND DEPT ID PROJECT TITLE

 Search Clear

Section 4 – The Access Data box

The Access data box displays a current view of the user’s access. Click on each security access tab to see each particular type of Financials access for the user.



The User Access view within the Access Data box

The User Access tab will allow the ACE to grant user access for the following applications:

- Requisition: Checking this box **ALLOWS** the user to prepare requisitions.
- eShip Global: Checking this box **ALLOWS** the user to ship packages.
- Project Budget: Checking this box **ALLOWS** the user to run the PBI Inquiry.
- Payment Request: Checking this box **ALLOWS** the user to prepare payment requests.
(This feature will not be available until the next upgrade in Summer 2016)



To make a mass update to the user’s profile for each TYPE of access, click on either the Select All or Clear All link. This action will select/clear all checkboxes in the vertical column for Dept ID’s the ACE owns



BE ADVISED: When this mass update function is used and the Select/Clear link is selected, it is not possible to revert to all the previous access the user had checked on their profile.

Click Save after any updates are selected.



Using the export feature will download an Excel spreadsheet of raw access data.  The ACE should immediately name and save the data to identify which employee and type of access is exported. (For example: Smith999DeptApprvs)

This is very useful when the ACE needs to review the access for a user before the access is copied to another user.

The Department Approvers view within the Access Data box

The Department Approvers tab will allow the ACE to grant user access for the following applications:

- Requisition: Checking this box **ALLOWS** the user to approve requisitions.
- Payment Request: Checking this box **ALLOWS** the user to approve payment requests.
(This feature will not be available until the next upgrade in Summer 2016)



Existing Departments and Approval Authority		Requisition	Payment Request
DEPT ID	DEPARTMENT		
G2000	Grad Sch Physiology	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Buttons: Save, Return to Search

To make a mass update to the user's profile for each TYPE of access, click on either the Select All or Clear All link. This action will select/clear all checkboxes in the vertical column for Dept ID's the ACE owns.



BE ADVISED: When this mass update function is used and the Select/Clear link is selected, it is not possible to revert to all the previous access the user had checked on their profile.

Click Save after any updates are selected.



Using the export feature will download an Excel spreadsheet of raw access data.  The ACE should immediately name and save the data to identify which employee and type of access is exported. (For example: Smith999DeptApprvs)

This is very useful when the ACE needs to review the access for a user before the access is copied to another user.

The Project Approvers view within the Access Data box

The Project Approvers tab will allow the ACE to grant the user access for the following applications:

- Signature Authority: Checking this box **ALLOWS** the user to approve paper documentation (ex: vouchers)

- Requisition: Checking this box **ALLOWS** the user to approve requisitions
- Payment Request: Checking this box **ALLOWS** the user to approve payment requests. (*This feature will not be available until the next upgrade in Summer 2016*)

PROJECT ID	PROJECT TITLE	FUND	DEPT ID	DEPARTMENT	Signature Authority	Requisition	Payment Request
103982	VARIOUS DONORS/PURPOSES	48901	G1700	Physiology	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Buttons: Save, Return to Search

To make a mass update to the user’s profile for each TYPE of access, click on either the Select All or Clear All link. This action will select/clear all checkboxes in the vertical column for Dept ID’s the ACE owns.



BE ADVISED: When this mass update function is used and the Select/Clear link is selected, it is not possible to revert to all the previous access the user had checked on their profile.

Click Save after any updates are selected.



Using the export feature will download an Excel spreadsheet of raw access data.  The ACE should immediately name and save the data to identify which employee and type of access is exported. (For example: Smith999DeptApprvs)

This is very useful when the ACE needs to review the access for a user before the access is copied to another user.

Updating an Operator profile/Adding Access

Preparer Access

To add financials access to a user so they prepare requisitions or payment requests, the ACE will select the User Access tab and complete the following steps:

1. Within the Action box, click on the Add button
2. Within the Filter and Search Criteria box, click on the Search button
3. Within the Access Data box, a listing of available access will populate. These are available Dept ID's the ACE has authority to add to this user's profile. The ACE should ONLY see Dept ID's they are owner of and the user does not currently have on their profile.
4. Within the Access Data box, check the boxes for the type of access to be added to the user's profile.
 - a. Select Requisition to allow the user to prepare requisitions
 - b. Select eShip Global to allow the user to ship packages
 - c. Select Project Budget to allow the user to view the Project Budget Inquiry. This access will allow the user to view key balances for a project ID without having to access the Data Warehouse application. **Be reminded:** the operator will be able to view all free balances for all Project ID's which fall under a Dept ID they have PBI access to.
 - d. Select Payment Request to allow the user to prepare payment requests
 - e. Select Inquiry Only to allow the user to view only without being in an approver role.
 - f. Click Save

Department Approvers Access

To add financials access to a user so they are department approvers for requisitions, the ACE will select the Department Approvers tab and complete the following steps:

1. Within the Action box, click on the Add button
2. Within the Filter and Search Criteria box, click on the Search button
3. Within the Access Data box, a listing of available access will populate. These are available Dept ID's the ACE has authority to add to this user's profile. The ACE should ONLY see Dept ID's they are owner of and the user does not currently have on their profile.
4. Within the Access Data box, check the boxes for the type of access to be added to the user's profile.
 - a. Select Requisition to allow the user to approve requisitions
 - b. Select Payment Request to allow the user to approve payment requests
 - c. Click Save

Please note:

When a Dept ID is added to a user's profile so they can be a requisition department approver, it will also insert the Dept ID on the User Access tab as "view only" so the approver can review the requisition before it is approved.

The Department Approver approves travel requisitions for Foreign travel, then all Foreign travel requisitions will automatically be forwarded to the VP and CFO when both approver roles have approved the requisition.

The Department Approver approves hazardous/radioactive requisitions, then all Environmental Health and Safety requisitions will automatically be forwarded to Environmental Health and Safety when both approver roles have approved the requisition.

Project Approvers Access

To add financials access to a user so they are project approvers for requisitions, the ACE will select the Project Approvers tab and complete the following steps:

1. Within the Action box, click on the Add button
2. Within the Filter and Search Criteria box, click on the Search button
3. Within the Access Data box, a listing of available access will populate. These are available Project ID's the ACE has authority to add to this user's profile. The ACE should **ONLY** see Project ID's they are owner of and the user does not currently have on their profile.
4. Within the Access Data box, check the boxes for the type of access to be added to the user's profile.
 - a. Select Signature Authority to allow the user to approver paper documents **ONLY** (ex: vouchers)
 - b. Select Requisition **AND** Signature Authority to allow the user to approve requisitions
 - c. Select Payment Request to allow the user to approve payment requests
 - d. Click Save

Please note:

When a PID is added to a user's profile so they can be a requisition project approver or signature authority approver, it will also insert the Dept ID for that PID on the User Access tab as "view only" so the approver can review the requisition before it is approved.

Updating an Operator Profile/Deleting Access

Preparer Access

To delete financials access to a user so they can no longer prepare requisitions, the ACE will **select the User Access tab** and complete the following steps:

1. Within the Action box, click on the Delete button
2. Within the Filter and Search Criteria box, click on the Search button
3. Within the Access Data box, a listing of current access will populate. These are available Dept ID's the ACE has authority to delete from the user's profile. The ACE should **ONLY** see Dept ID's they are owner of and the user currently has on their profile.
4. Within the Access Data box, uncheck the boxes for the type of access to be deleted from the user's profile.
 - a) Uncheck Requisition to prevent the user from preparing requisitions
 - b) Uncheck eShip Global to prevent the user from shipping packages

- c) Uncheck Project Budget to prevent the user from viewing info in the Project Budget Inquiry
- d) Uncheck Payment Request to prevent the user from preparing payment requests
- e) Once the ACE unchecks the appropriate boxes, click on the “Delete” checkbox in front of the Dept ID to remove this Dept ID from the user’s profile.
- f) Click Save

Department Approvers Access

To delete financials access to a user so they can no longer approve as a department approver for requisitions, the ACE will **select the Department Approvers tab** and complete the following steps:

1. Within the Action box, click on the Delete button
2. Within the Filter and Search Criteria box, click on the Search button
3. Within the Access Data box, a listing of current access will populate. These are available Dept ID’s the ACE has authority to delete from the user’s profile. The ACE should ONLY see Dept ID’s they are owner of and the user currently has on their profile.
4. Within the Access Data box, uncheck the boxes for the type of access to be deleted from the user’s profile.
 - a. Uncheck Requisition to prevent the user from approving requisitions
 - b. Uncheck Payment Request to prevent the user from approving payment requests
 - c. Once the ACE unchecks the appropriate boxes, click on the “Delete” checkbox in front of the Dept ID to remove this Dept ID from the user’s profile.
 - d. Click Save

Please note:

If the user has no additional need to view any information for the Dept ID that was removed as a Department or Project Approver, the ACE must now remove the Dept ID role on the User Profile tab.

1. Click on the User Access tab
2. From the “User Access Actions” section, click on Delete
3. From the “Delete Department(s) and User Access section, click in the checkbox for the Dept ID to be deleted from the user’s access.
4. Click Save

Project Approvers Access

To delete financials access to a user so they can no longer approve as a project approver for requisitions, the ACE will **select the Project Approvers tab** and complete the following steps:

1. Within the Action box, click on the Delete button
2. Within the Filter and Search Criteria box, click on the Search button
3. Within the Access Data box, a listing of current access will populate. These are available Project ID’s the ACE has authority to delete from the user’s profile. The ACE should ONLY see Project ID’s they are owner of and the user currently has on their profile.
4. Within the Access Data box, uncheck the boxes for the type of access to be deleted from the user’s profile.
 - a. Uncheck Signature Authority to prevent the user from approving paper documents (ex: vouchers)
 - b. Uncheck Requisition to prevent the user from approving requisitions

- c. Uncheck Payment Request to prevent the user from approving payment requests
- d. Once the ACE unchecks the appropriate boxes, click on the “Delete” checkbox in front of the PID to remove this PID from the user’s profile.
- e. Click Save

Please note:

If the user has no additional need to view any information for the Dept ID that was removed as a Department or Project Approver, the ACE must now remove the Dept ID role on the User Profile tab.

1. Click on the User Access tab
2. From the “User Access Actions” section, click on Delete
3. From the “Delete Department(s) and User Access section, click in the checkbox for the Dept ID to be deleted from the user’s access.
4. Click Save

P.O. Dispatch

The PO Dispatch Notification Process will accelerate and expand communication of purchase order issuances. The PO Dispatch Notification Process will automatically send e-mail to departmental requesters and requisition contacts to notify them when a purchase order has been issued for a requisition.

Create Requisition

1. Requisition Defaults | 2. Add Items and Services

Specify and Modify requisition name, requester, and other information that applies to the entire requisition.

Requester: CARRANCO Carranco, Diane S

Requisition Name: Office Supplies - Spring 2010 Origin: ONL

*Requisition Type: BASIC REQUISITION *Priority: Medium

Travel Type: Radioactive/Hazardous

*Vendor ID: 0000212726 001IL60602 OFFICE DIRECT INC
123 W MADISON ST SUITE 1000

*Project: 106310

*Ship To: MAIN

*Fiscal Year: 2010

*Due Date: 01/13/2010

Contact Information

*Cntct Name: Carranco, Diane S *Cntct Phone: 210/562-6400

*Cntct Email: carranco@uthscsa.edu

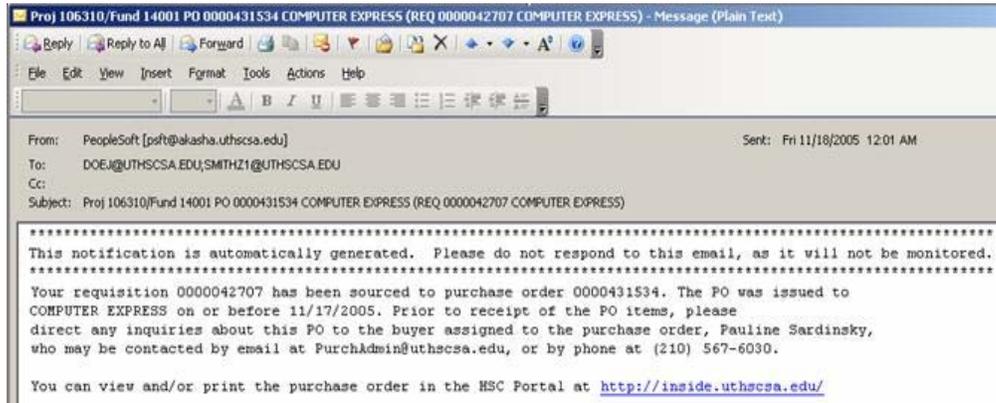
*Deliver To: 493.L MED Same As Contact

*Deliver Name: Carranco, Diane S Deliver Phn: 210/562-6400

Continue

PO Dispatch notifications are sent to the Requester, who entered the requisition and to the requisition contact.

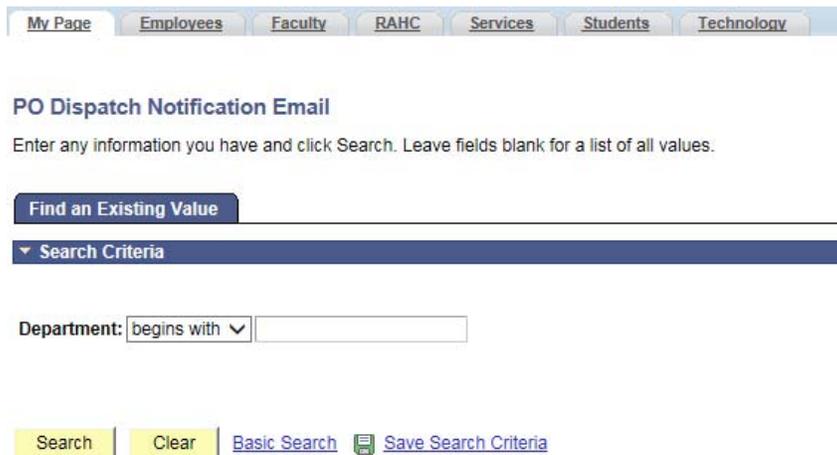
Below is an example of the email notification sent to the requester, contact person and any additional persons listed.



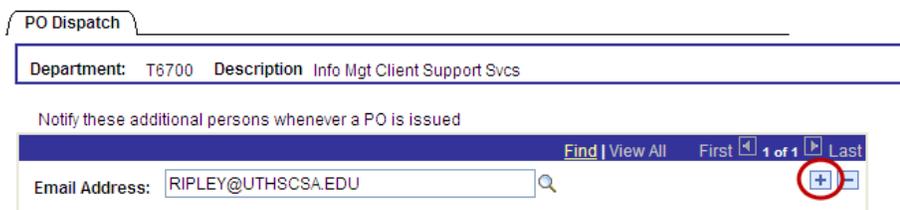
Besides the requester and requisition contact person, it may be desirable for others in the department to be notified of purchase order issuances. The departmental ACE will have the option of designating up to six additional persons to receive notifications whenever a purchase order is issued for one of the department’s requisitions.

To add a user to the PO Notification process, the ACE should complete the following steps:

1. Go to HSC Business Applications
2. ACE Tools
3. PO Dispatch Notification Email
4. Enter the Dept ID or the first letter of the Dept ID and click the **Search** button.



5. Type in the UTHSCSA e-mail address of the person(s) who should receive the PO notifications.



6. Click SAVE

PO Dispatch

Department: T6700 Description Info Mgt Client Support Svcs

Notify these additional persons whenever a PO is issued

Find | View All | First | 1-2 of 2 | Last

Email Address:	RIPLEY@UTHSCSA.EDU		
Email Address:	MENDOZAMM@UTHSCSA.EDU	Mendoza, Michelle Marie	

Save Return to Search Previous in List Next in List

Each time a PO is issued for one of the department's requisitions, the person(s) designated on the PO Dispatch panel will receive an e-mail identical to the e-mail sent to the departmental requester and requisition contact.

Requests requiring intervention from Application Security

The departmental ACE is still required to send an email request to the Application Security team for the following issues:

- ❑ Mass updates, personnel moves, or similar changes can be accomplished through the new Requisition Security panel. However, the time involved to make these changes online might warrant the ACE to submit the request to the Application Security team so the mass updates and/or move can be made programmatically.

The departmental ACE is still required to submit a PSAR request to the Application Security team for processing through the IMS Self Service Portal for the following issues:

- ❑ Adding Preparers, Department Approvers and Project Approvers for department Z9xxx, or the projects associated with Z9xxx. The ACE will use the Comment Box and type the following information:
 - Example: Please add Z9001 to current Financials access for (Empl Name) as Project Approver for PID XXXXXX
 - Example: Please add Z9001 to current Financials access for (Empl Name) as Department Approver
 - Example: Please add Z9001 to current Data Warehouse access for (Empl Name)
- ❑ Application access for POI's
Persons of Interest do not automatically have a profile created because they are not actual employees at UTHSCA. Additionally, application access is limited for non-employees. Please submit any questions to Transition Solutions for review.