

Access Control Executive

ACE Security Enhancements

Quick Guide

Project Portfolio Management & Delivery/Transition Solutions



Version 2 | July 2015
210-567-7777 Option 5

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ACE Tools Enhancements, July 2015

In July of 2015 the ACE Tools utilized by department ACEs received enhancements to increase functionality and to simplify the process of adding and removing Financials access for departmental users. The enhancements are depicted below. Further learning options are available in the Knowledge Center under ACE Security tool found at kc.uthscsa.edu.


Navigation

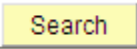
When viewing Financials access for a user, the pages are now broken up into multiple security access tabs in comparison to the one-page view previously seen in the ACE Tools/Department Inquiry and ACE Tools/ACE Security menus. Processes will remain the same, ACEs will still need to access the ACE Security page to update Financials access to a user. A closer view of each section is discussed in the following pages.

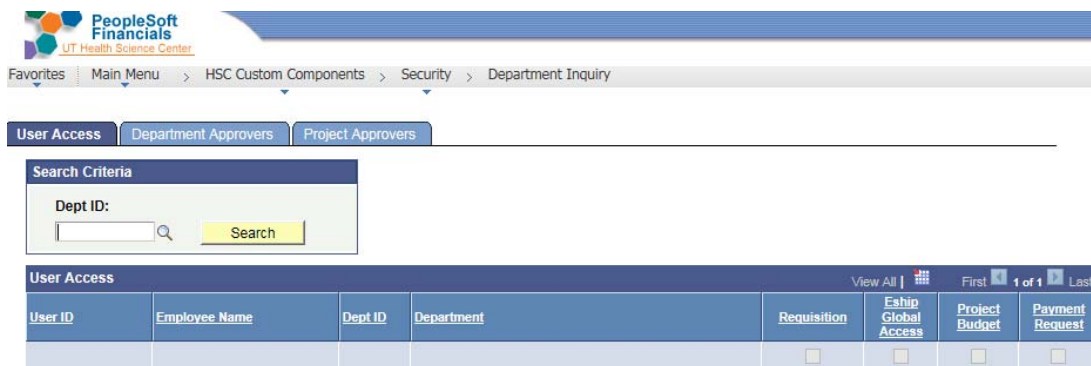
Review Department ID Setup

In order to assist the ACE in maintaining their 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.

- ❑ Go to HSC Business Applications
 - a) ACE Tools
 - b) Department Inquiry

Log into ACE Tools and select Department Inquiry, click on the  icon to view ALL deptid's the ACE owns.

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 payment requests (*This feature will not be available until the next upgrade in Summer 2016*)

The ACE can also search by clicking the magnifying glass icon to view a listing of Department ID’s within their 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	eShip Global Access	Project Budget	Payment Request
BRUNSD	Bruns,Dalin 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:

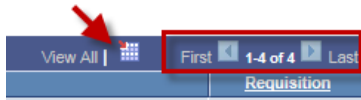
- Requisition – If checked, the user can approve financials requisitions

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 their ownership.

- Select the Deptid then click on Search to view a listing of users who have access to that Deptid and their 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

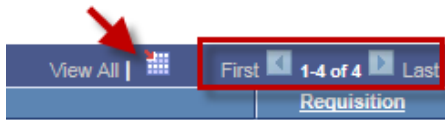
The ACE can also search by any of the following options:

- DeptID field – Enter the Department id or click the magnifying glass icon to view a listing of Deptid’s within the ACE’s ownership. Select a Deptid and click on search to view a listing of users who have access to that Deptid.
- User ID field – Enter the user’s domain id or click the magnifying glass icon to view a listing of users who have access to your PID’s. Select the user and click on search to view PID’s they can approve on.
- 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 your 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.

The information from the Project Approver page can 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 find all the project ids for a Project Approver regardless of department. Additionally, the list of projects shows the current project status of “Active”.

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.



ACE Security

NEW VIEW

Multiple Security Access tabs

Section 1 – Header tabs

Section 2 – Action box

Section 3 – Filter and Search Criteria box

Section 4 – Access Data box

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"/>

CURRENT VIEW

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.

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.

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.

User Access Actions box from User Access tab

Department Approvers Action box from Department Approvers tab

Project Approvers Action box from Project Approvers tab

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.



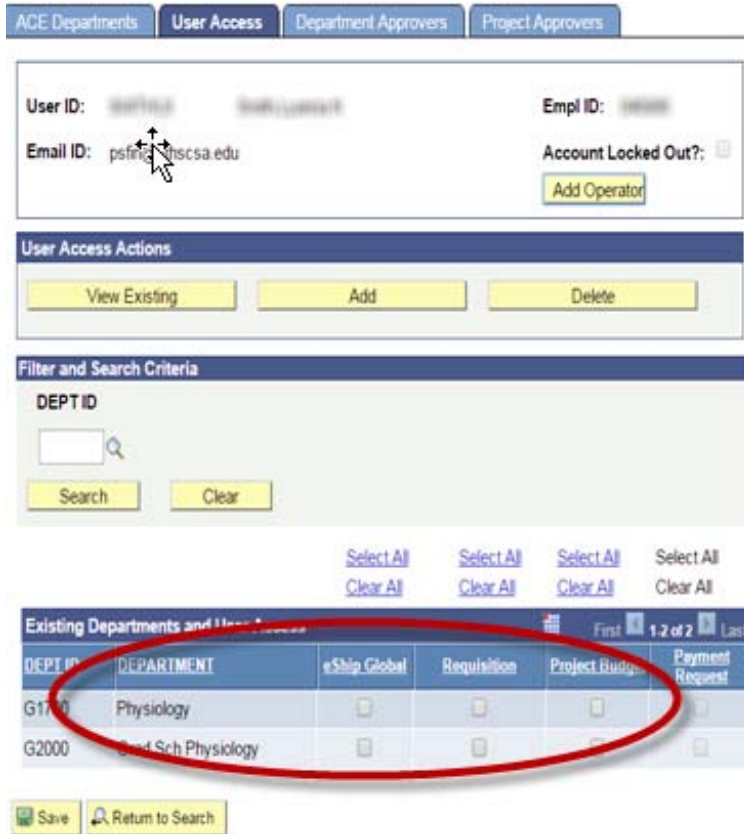
By typing in a portion of the Deptid, PID, Fund or Project title and clicking the magnifying glass icon, a list of criteria that matches the parameters entered will populate in the Access Data box.

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

The Project Approver tab view of this section:

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 Deptid’s the ACE owns.



BE ADVISED: When this mass update function is used and you Select/Clear all access the user previously had checked on their profile, **it is not possible to revert back to the previous access.** Click Save after any updates are selected.



Using the export feature will download an excel spreadsheet of raw access data.  You should immediately name and save your data to identify which employee and type of access you are exporting. (For example: Smith999DeptAprvs)

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		First 1 of 1 Last	
DEPT ID	DEPARTMENT	Requisition	Payment Request
G2000	Grad Sch Physiology	<input checked="" type="checkbox"/>	<input type="checkbox"/>


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 Deptid's the ACE owns.



BE ADVISED: When this mass update function is used and you Select/Clear all access the user previously had checked on their profile, it is not possible to revert back to the previous access. Click Save after any updates are selected.



Using the export feature will download an excel spreadsheet of raw access data.  You should immediately name and save your data to identify which employee and type of access you are exporting. (For example: Smith999DeptAprvs)

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) **Note: The Signature Authority checkbox must be checked first before the Requisition box is enabled.**

- Requisition: Checking this box **ALLOWS** the user to approver 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 Project and Approval Authority					Select All Clear All	Select All Clear All	Select All Clear All
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"/>


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 Deptid's the ACE owns.



BE ADVISED: When this mass update function is used and you Select/Clear all access the user previously had checked on their profile, it is not possible to revert back to the previous access. Click Save after any updates are selected.



Using the export feature will download an excel spreadsheet of raw access data.  You should immediately name and save your data to identify which employee and type of access you are exporting. (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.

Adding Financials Access

Preparer Access

To add financials access to a user so they prepare requisitions, 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 Deptid's the ACE has authority to add to this user's profile. The ACE should ONLY see deptid'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 you want to add 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
 - d. Select Payment Request to allow the user to prepare payment requests (*This feature will not be available until the next upgrade in Summer 2016*)
 - e. 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 Deptid's the ACE has authority to add to this user's profile. The ACE should ONLY see deptid'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 you want to add 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 (*This feature will not be available until the next upgrade in Summer 2016*)
 - c. Click Save

Please note:

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

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 Projectid's the ACE has authority to add to this user's profile. The ACE should ONLY see projectid'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 you want to add 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 (*This feature will not be available until the next upgrade in Summer 2016*)
 - 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 Deptid for that PID on the User Access tab as "view only" so the approver can review the requisition before it is approved.

Deleting Financials 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:

5. Within the Action box, click on the Delete button
6. Within the Filter and Search Criteria box, click on the Search button
7. Within the Access Data box, a listing of current access will populate. These are available Deptid's the ACE has authority to delete from the user's profile. The ACE should ONLY see deptid's they are owner of and the user currently has on their profile.
8. Within the Access Data box, uncheck the boxes for the type of access you want to delete 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 (*This feature will not be available until the next upgrade in Summer 2016*)
 - e. Once the ACE unchecks the appropriate boxes, click on the "Delete" checkbox in front of the Deptid to remove this deptid 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 Deptid's the ACE has authority to delete from the user's profile. The ACE should ONLY see deptid'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 you want to delete 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 (*This feature will not be available until the next upgrade in Summer 2016*)
 - c. Once the ACE unchecks the appropriate boxes, click on the "Delete" checkbox in front of the Deptid to remove this deptid from the user's profile.
 - d. Click Save

Please note:

If the user has no additional need to view any information for the Deptid that was removed as a Department or Project Approver, the ACE must now remove the Deptid 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 Deptid you are deleting 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 Projectid’s the ACE has authority to delete from the user’s profile. The ACE should ONLY see projectid’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 you want to delete from the user’s profile.
 - a. Uncheck Signature Authority to prevent the user from approving paper documents (ex: vouchers)

Note: The Signature Authority checkbox must be checked first before the Requisition box is enabled.

- b. Uncheck Requisition to prevent the user from approving requisitions
- c. Uncheck Payment Request to prevent the user from approving payment requests (*This feature will not be available until the next upgrade in Summer 2016*)
- 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 Deptid that was removed as a Department or Project Approver, the ACE must now remove the Deptid 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 Deptid you are deleting from the user’s access.
4. Click Save