

PeopleSoft Access Request Form

American River College Cosumnes River College District Office Folsom Lake College Sacramento City College

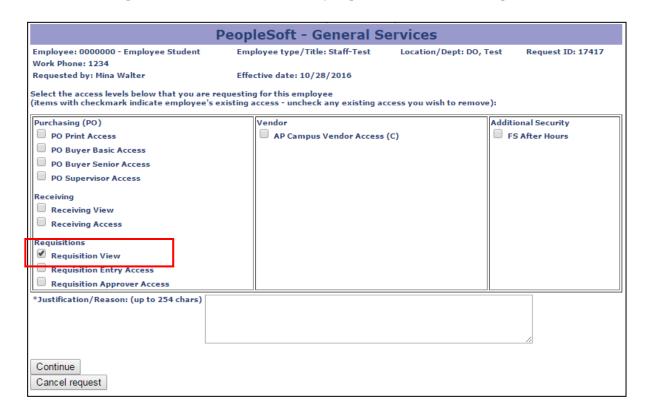
General Services Requisition Security Guide

Requisition Security access is broken down into three key components. This document outlines the purpose of each, how they work together, and provides guidance on how to request the appropriate security to meet a user's business needs. See the Online SAS Requester Guide for instructions on how to use the Security Access System. Please also reference the General Services Definitions of Roles document for detailed information about the pages the roles described below will gain access to in the PeopleSoft Financials system.

Note: requisition access is granted only to business areas trained to use the online requisition functionality in PeopleSoft. Contact the Purchasing Department at (916) 568-3071 for information.

Requisition View

- Who Should Request This Role
 - Staff who wish to view requisitions in PeopleSoft Finance
 - Staff who wish to print requisitions from PeopleSoft Finance
- ➤ How to Request This Role
 - Use the PeopleSoft General Services security request form and select "Requisition View"



Last Revised: 10/28/16

Requisition Entry Access

- ➤ Who Should Request This Role
 - Staff who will be entering and processing requisitions in the PeopleSoft Finance system
 - Staff will be granted the ability to review budget information, view matching activity on their requisitions (receiving, invoicing, etc.), and view vendor files in the system.
- ➤ How to Request This Role
 - Requesting this access requires completion of a two-step process:
 - 1. Use the PeopleSoft General Services security request form and select "Requisition Entry Access"



2. Complete this form and hit the "Continue" button and the screen below will be displayed. Note the text in the red box. Click the "Request FS Requisitions Add/Update Entry Access for <Employee Name>" link.

3. List employee info for all "requesters" for whom the requisition entry person has authority to set up requisitions in Peoplesoft Finance. There is space at the bottom of the form to enter employees who should be *removed* from the list of "requesters" for the entry person.

This employee can enter r	equisicions for en				
	Name	e ronowing starri	1		
0000001	Reque	ster 1			
0000002	Reque	ster 2			
0000003	Reque	ster 3			
II I				ll l	

Requisition Approver Access

- ➤ Who Should Request This Role
 - Staff who will be approving requisitions in the PeopleSoft Finance system
 - Staff will be granted the ability to review budget information, view accounting entries and PO information.

- ➤ How to Request This Role
 - Requesting this access requires completion of a two-step process:

1. Use the PeopleSoft - General Services security request form and select "Requisition Approver Access"

PeopleSoft - General Services							
Employee: 0000000 - Employee Student	Employee type/Title: Staff-Test	Location/Dept: DO, 1	Test Request ID: 17417				
Work Phone: 1234							
Requested by: Mina Walter	Effective date: 10/28/2016						
Select the access levels below that you are requesting for this employee (items with checkmark indicate employee's existing access - uncheck any existing access you wish to remove):							
Purchasing (PO)	Vendor		Additional Security				
PO Print Access	AP Campus Vendor Access (C)	FS After Hours				
PO Buyer Basic Access							
PO Buyer Senior Access							
PO Supervisor Access							
Receiving							
Receiving View							
Receiving Access							
Requisitions							
Requisition View							
Requisition Entry Access							
Requisition Approver Access							
*Justification/Reason: (up to 254 chars)	Test						
Continue							
Cancel request							
- Carrott Toques							

2. Complete this form and hit the "Continue" button and the screen below will be displayed. Note the text in the red box. Click the "Request FS Requisitions Add/Update Approver Access for <Employee Name>" link.

PeopleSoft - General Services							
Employee: 0000000 - Employee Student Work Phone: 1234	Employee type/Title: Staff-Test	Location/Dept: DO, Test	Request ID: 17417				
Requested by: Mina Walter Effective date: 10/28/2016							
You have requested the following:							
Add Role Requisition Approver Access LR_FS_PO_Requisition_Approver FS Database							
This request requires additional access forms be completed. Click a link below to continue:							
Request FS Requisitions - Add/Update Approx	ver Access for Employee Student						

3. List employee info for all "requesters" for whom the requisition entry person has authority to approve requisitions in Peoplesoft Finance. There is space at the bottom of the form to enter

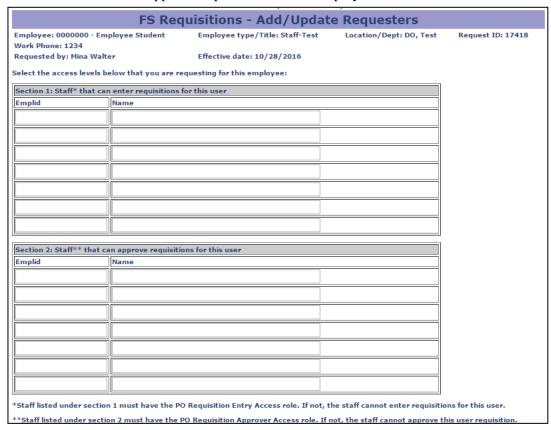
	FS F	Requisitions	- Add/Update	e Approver	
Requested by: Mir	00 - Los Rios Student	Employee type/Tit Effective date: 11/	ele: Class. Temp-Test /02/2016	Location/Dept: DO, Test	Request ID: 17379
Section 1: Select	additional authorization	if applicable			
	All Requesters (Association \$5000 & over	te Vice Chancellor, Fin	ance or Deputy Chance	llor Only)	
Section 2: This en	nployee can approve, up	date and cancel requi	sitions for the following	staff:	
Emplid	Name				
0000001	Requester 1				
0000002	Requester 2				
0000003	Requester 3				
	n NO LONGER approve, u ons for the following sta	puate	Requester 4		÷.
	■ Note: Se Office.	ection 1 of this fo	orm applies only t	o a select few executiv	ves at the District
	33				
	33				
	33				
	33				

It may become necessary periodically to modify the relationships between requestors and the staff assigned to enter and approve requisitions on their behalf. For example, when a new employee is hired into a department and will be requesting purchases, they will need to be assigned to a requisition entry person and a requisition approver. When this occurs, take the following steps:

1. Navigate to the SAS system and initiate a new request. Enter the required information for the requester for whom the changes need to be made and select the **FS Requisitions** – **Add/Update Requester(s)** supporting form.

Request Access - User Information						
* asterisks indicate required fields						
*Employee ID#:	0000000	*Last Name:	Do	e	*First Name:	Jane
*Work Phone:	1234				M.I.:	
*Employee type:	Classified Temporary V	Other:			*Job title:	Sample Title
*College/Site:	District Office	*Department:	Sa	mple Department		
*Effective Date:	10/21/2016					
Select a security access form: Or, select a supporting form:						
Select a form		~		FS Requisitions -		equester(s) 🗸
* (select either a n	nain form or a supporting form)					
Continue						

2. Use the **FS Requisitions** – **Add/Update Requester(s)** form to identify staff who should be authorized to enter and approve requisitions for this employee.



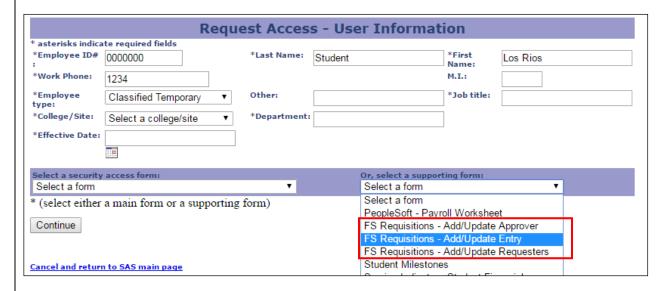
In the supporting form drop down, there are two additional forms that may be occasionally used for maintenance.

• FS Requisitions – Add/Update Approver

 This is the same form as shown in <u>step 3 of the Requisition Approver</u> access section of this document. Use it to add or remove requesters for an employee already set up with requisition approver access.

• FS Requisitions – Add/Update Entry

• This is the same form as shown in <u>step 3 of the Requisition Entry access</u> section of this document. Use it to add or remove requesters for an employee already set up with requisition approver access.



Note: employees who separate from Los Rios will automatically be removed from the requester list.