ESS Job Aid

PeopleSoft Financial Services Access

Requesting Access for

- Financial Delegation
- Department Enquiry
- Web Requestor

Prepared by: Enterprise Systems Services
Last modified: 23 January 2024 (version 1.1)

Contents

How to log Financial Service access

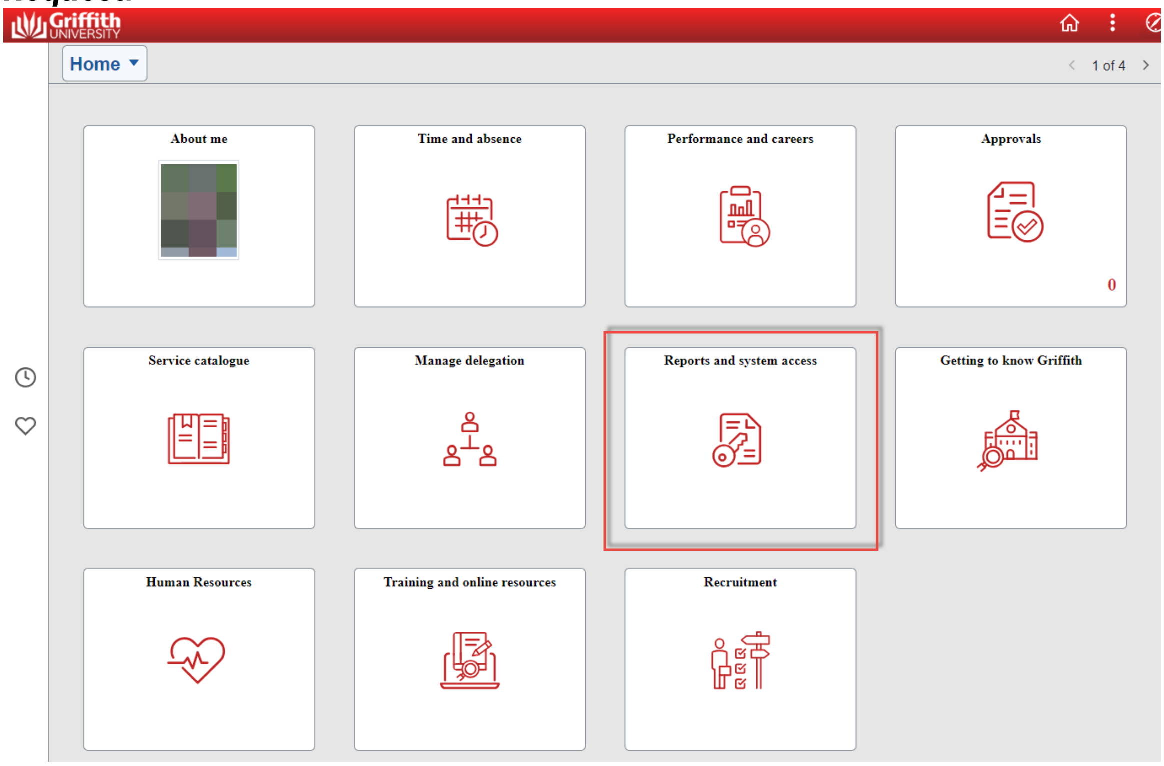
Use the PeopleSoft Access Form to request access to Financial Delegation, Department Enquiry and Web Requestor, including access to PeopleSoft Student, Finance or HR Payroll systems. The form can be completed by an individual or on behalf of another user, it can be used to request access to all three of these financial services in one request or individually as needed. The form must have user details, financial service details and policy agreement prior to submitting the request.

Access can be requested for pre-employees, existing staff members and several person of interest types throughout the university. Supervisors of staff are recommended to submit access requests on behalf team members requiring financial services access. These forms allow for early provisioning of access for newcomers prior to their arrival on day one to minimise a delay in gaining access to the financial services.

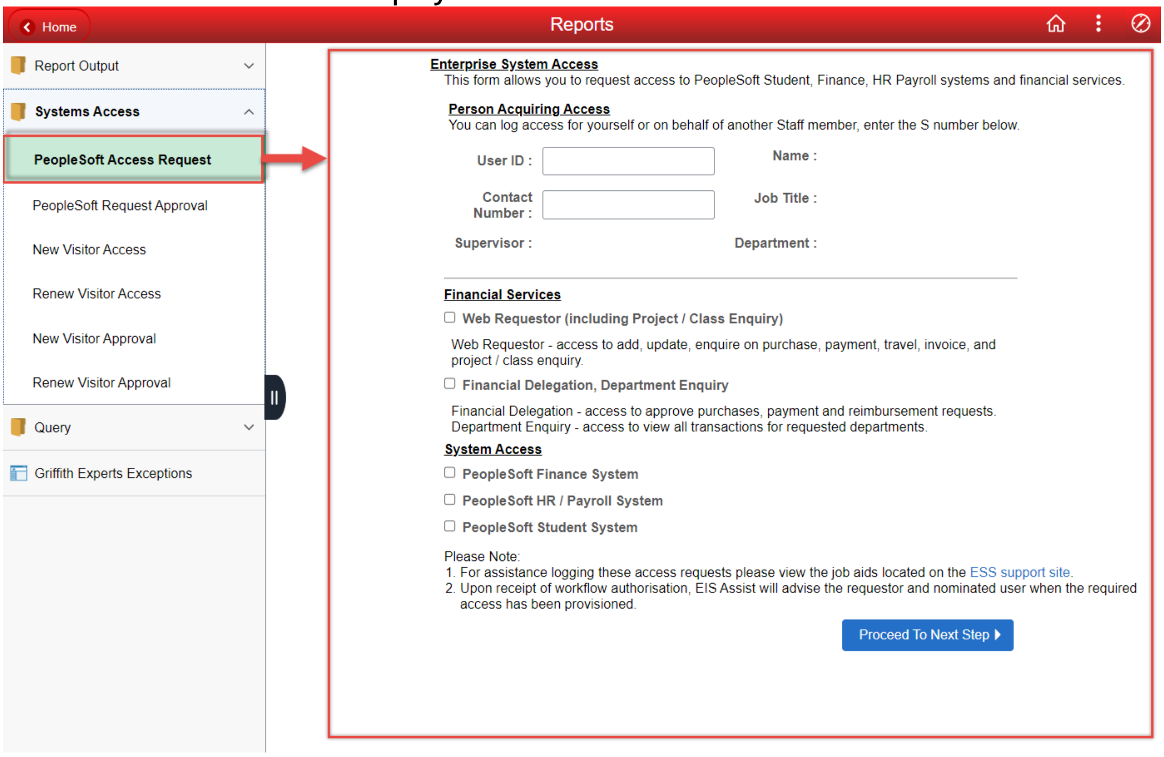
The form utilises a wizard-based approach, allowing you to navigate back and forth throughout the request at any time to change or modify the request before submission.

Accessing the request form

The PeopleSoft Access Form is located within the My Staff Page and is accessible to all staff. To use the form, navigate to the Staff Portal and click on ***My Staff Page*** under ***Key Services.*** Click the ***Reports and System Access* tile > click *System Access*** on the left-hand-side navigation menu > select ***PeopleSoft Access Request***.

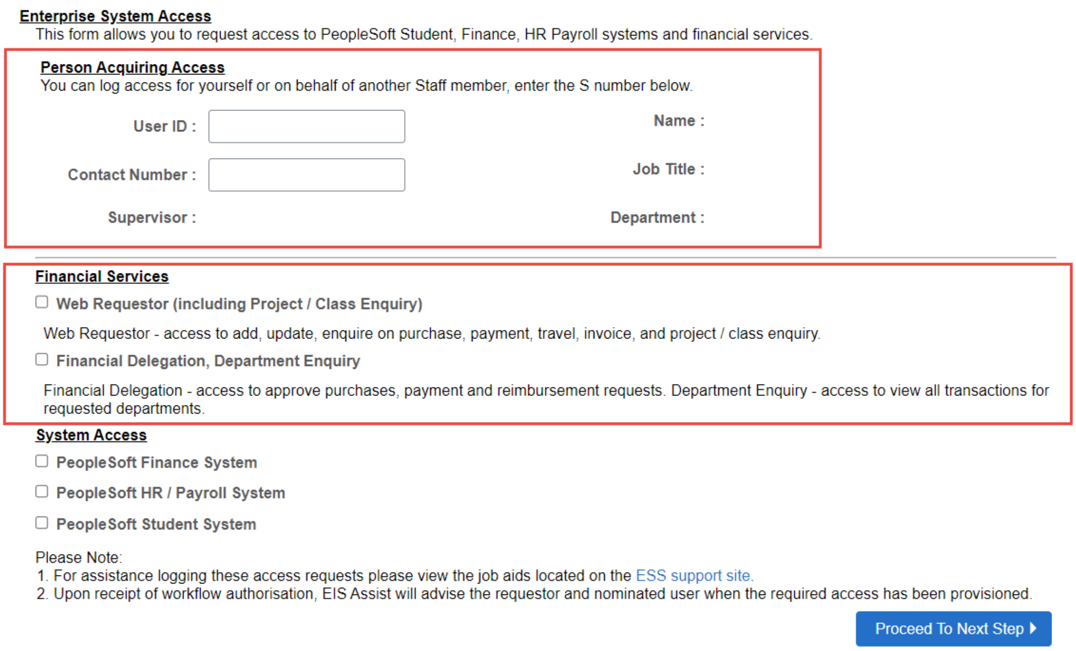


The Welcome screen will display to the in the main content area.



The welcome page

The welcome page requires user details and selection of system access and or financial services.



Entering the user details and selecting system access

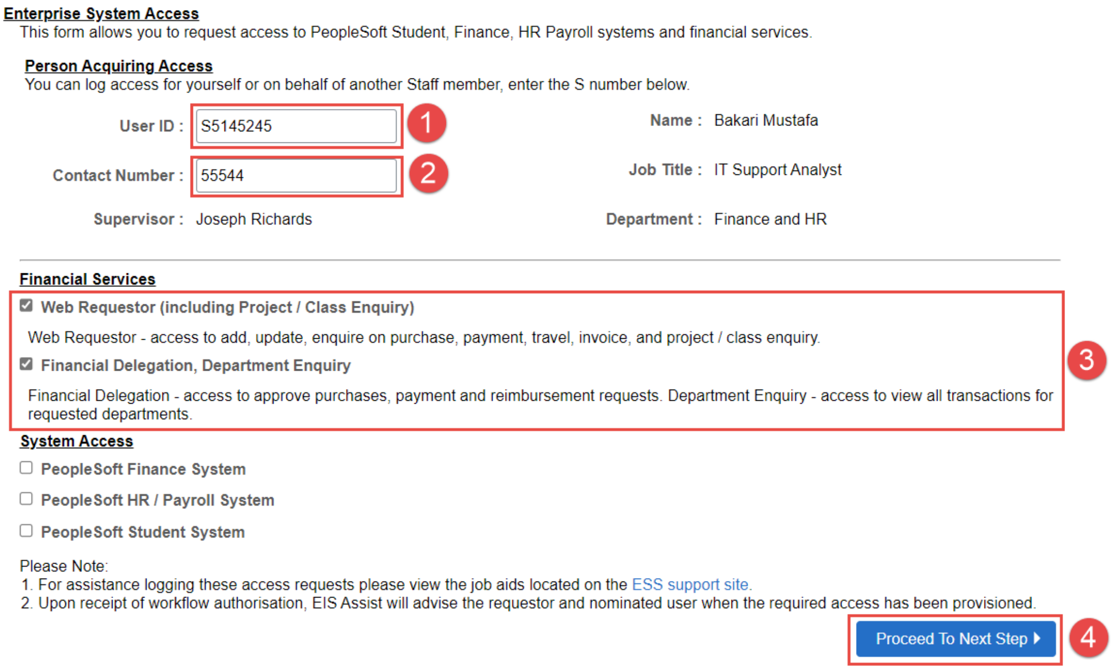
Access can be requested by an individual or on behalf of another user.

Step 1: Enter the S number of the person obtaining access in the *Person Acquiring Access* section. Pressing the Enter or tab key will auto-populate the name, *job title, department and supervisor* fields.

Step 2: Enter a contact number; this can be an extension number, mobile number or other relevant contact number of the user obtaining access.

Step 3: Select the relevant checkboxes for the financial services of which access is required. This can be one or multiple services, also including PeopleSoft system access if necessary.

Step 4: Once all required data has been entered press the ***Proceed to Next Step*** button.



Enterprise System Access

This form allows you to request access to PeopleSoft Student, Finance, HR Payroll systems and financial services.

Person Acquiring Access

You can log access for yourself or on behalf of another Staff member, enter the S number below.

User ID : S5145245 — 1

Name : Bakari Mustafa

Contact Number : 55544 — 2

Job Title : IT Support Analyst

Supervisor : Joseph Richards

Department : Finance and HR

Financial Services

- [x] Web Requestor (including Project / Class Enquiry)

Web Requestor - access to add, update, enquire on purchase, payment, travel, invoice, and project / class enquiry.

- [x] Financial Delegation, Department Enquiry

Financial Delegation - access to approve purchases, payment and reimbursement requests. Department Enquiry - access to view all transactions for requested departments.

3

System Access

- [ ] PeopleSoft Finance System
- [ ] PeopleSoft HR / Payroll System
- [ ] PeopleSoft Student System

Please Note:
1. For assistance logging these access requests please view the job aids located on the ESS support site.
2. Upon receipt of workflow authorisation, EIS Assist will advise the requestor and nominated user when the required access has been provisioned.

Proceed To Next Step — 4

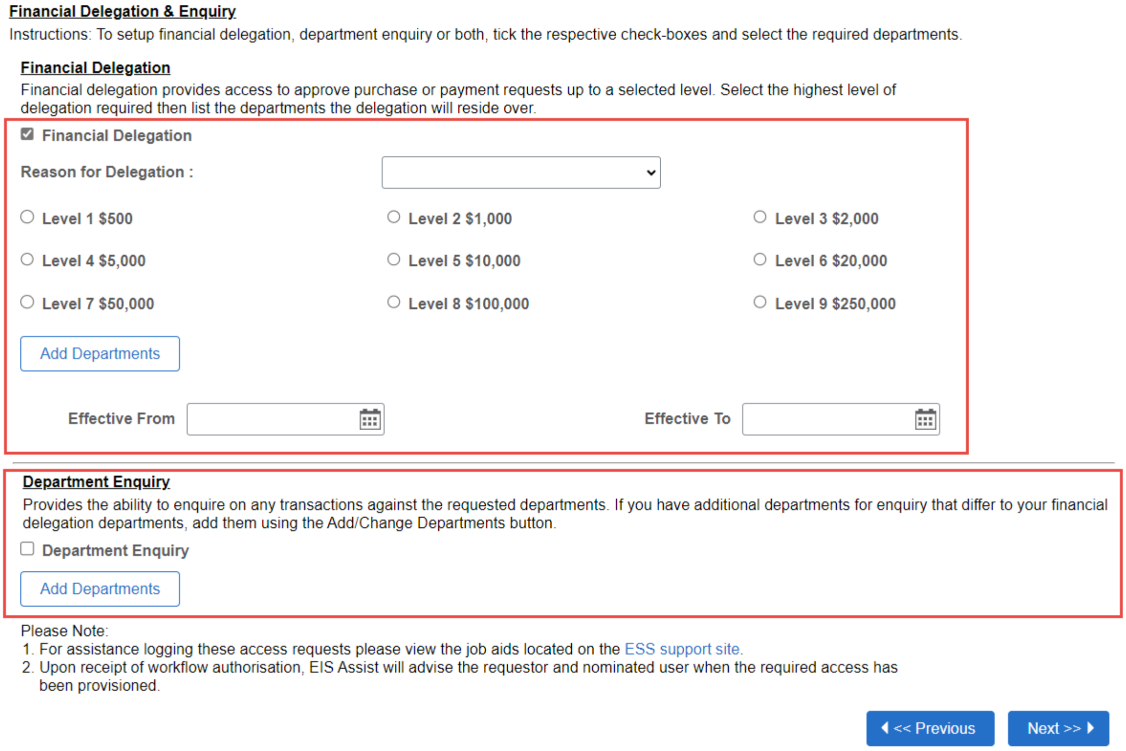
The financial delegation & department enquiry access page

The financial delegation and enquiry page allows the requestor to add new or modify existing delegation and enquiry access. This form allows the requestor to select both delegation and enquiry together or just one type of access. However, enquiry access will usually replicate delegation access.

If the acquiring user has existing access their delegation level and departments will display. The delegation level can be changed, and the existing departments can be removed or added to.

For someone without existing access, clicking the department enquiry checkbox after first selecting financial delegation departments will automatically replicate the departments in the enquiry grid. However, if you have existing delegation access and are adding new departments to it, you'll have to replicate these departments manually in the enquiry department grid.

Please note, department enquiry should generally be selected if you are requesting financial delegation.



Please Note:

- Departments for delegation or enquiry can be selected across multiple groups, for example, departments within BUS and departments within UCS could be selected.
- Please limit selection of departments to only those required for delegation and enquiry. Unnecessary department requests will be denied.

Requesting financial delegation

Financial Delegation – new access

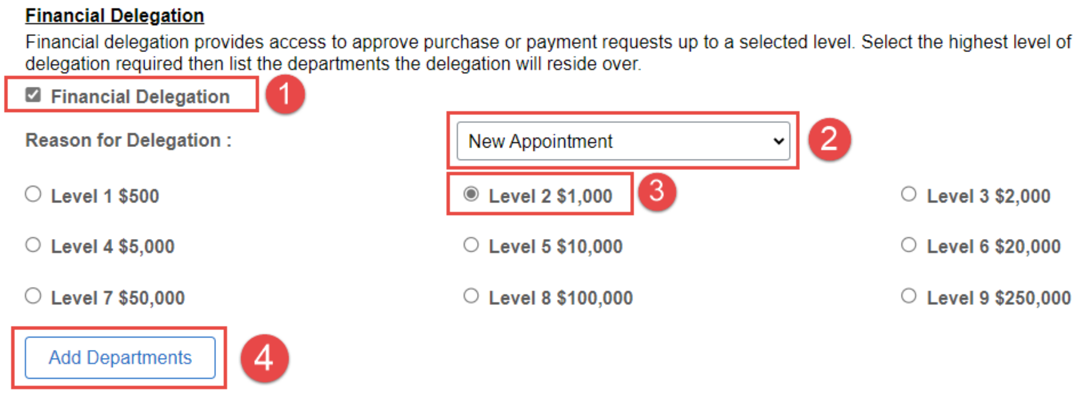
To request new Financial Delegation access for a user, follow the below steps.

Step1: Tick the *Financial Delegation* checkbox (already selected if existing delegation).

Step 2: Select the Reason for Delegation.

Step 3: Select the appropriate delegation level or kept it the same.

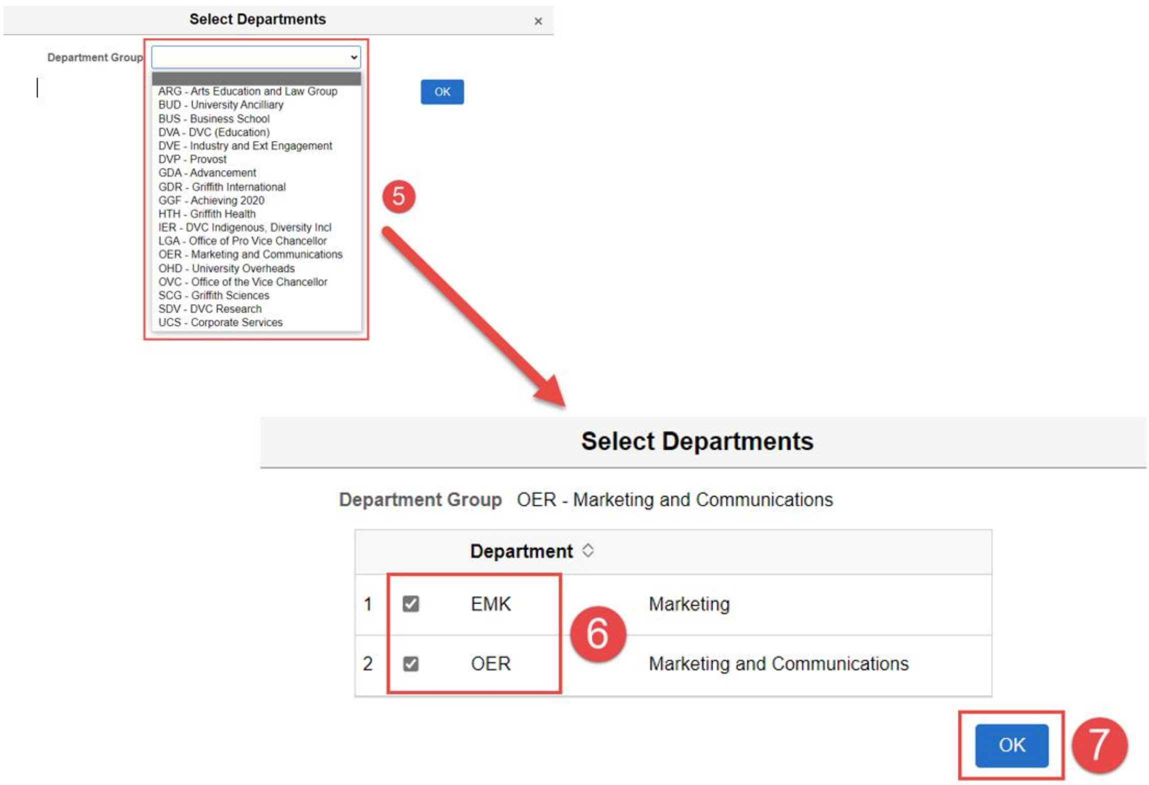
Step 4: Click the *Add/Change Departments* button to enter the department selector.



Step 5: Select a group level department from *Department Group* dropdown box.

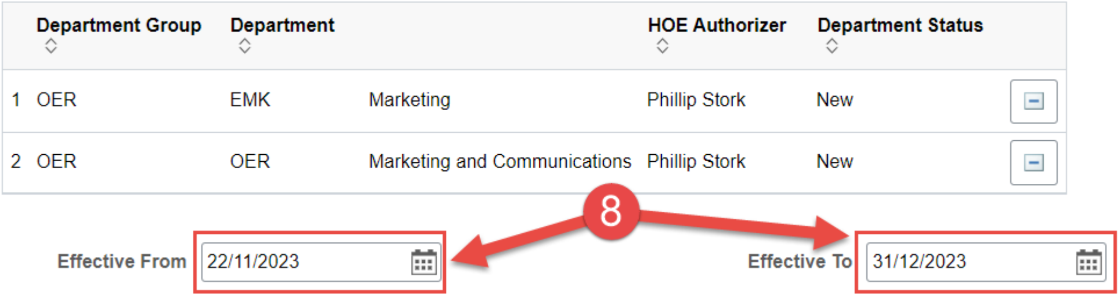
Step 6: Tick the department check boxes delegation is required for.

Step 7: Once all required departments have been selected press the *OK* button.



Upon selection of the required departments and pressing OK, the request screen will update to show the departments.

Step 8: Select the *Effective From* and *Effective To* dates if for a fixed term period.



At this point you can continue to request department enquiry or go through to the summary screen.

Financial delegation – existing access

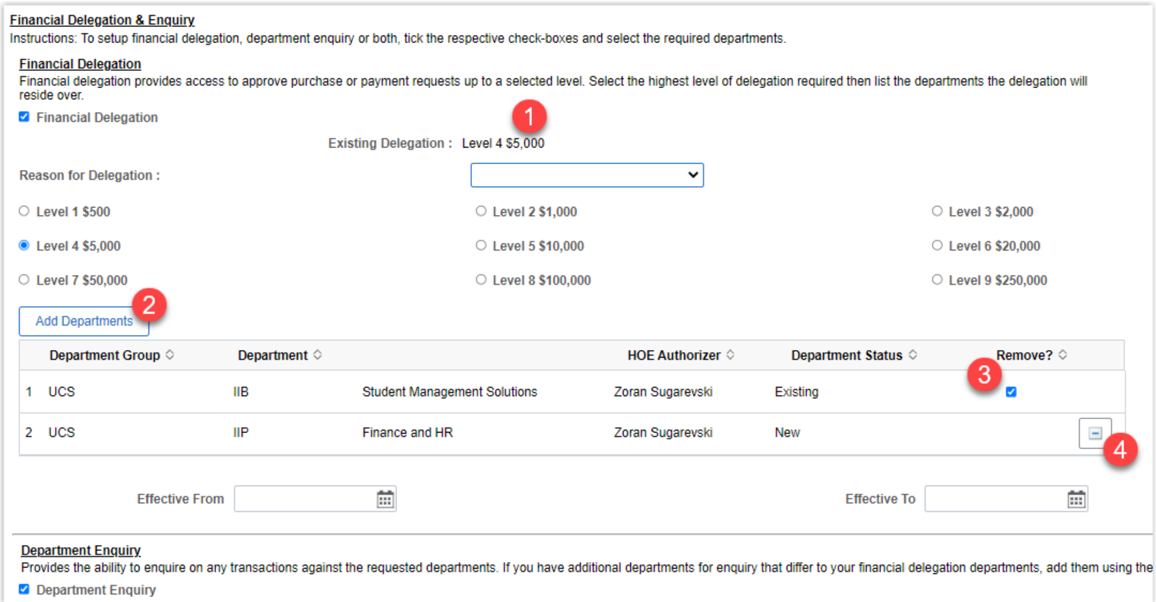
To modify existing Financial Delegation access for a user, follow the below steps.

Step1: View existing delegation level and update if necessary.

Step 2: Add additional departments using the *Add Departments* button.

Step 3: Remove any existing departments if no longer required.

Step 4: Use the *minus row* button in the department grid to remove any mistakenly added new departments.



Requesting department enquiry access

Department enquiry can be logged in conjunction with financial delegation or separately without delegation. If the acquiring user has existing access, their departments will display, and the existing departments can be removed or added to.

Steps for requesting department enquiry are explained below.

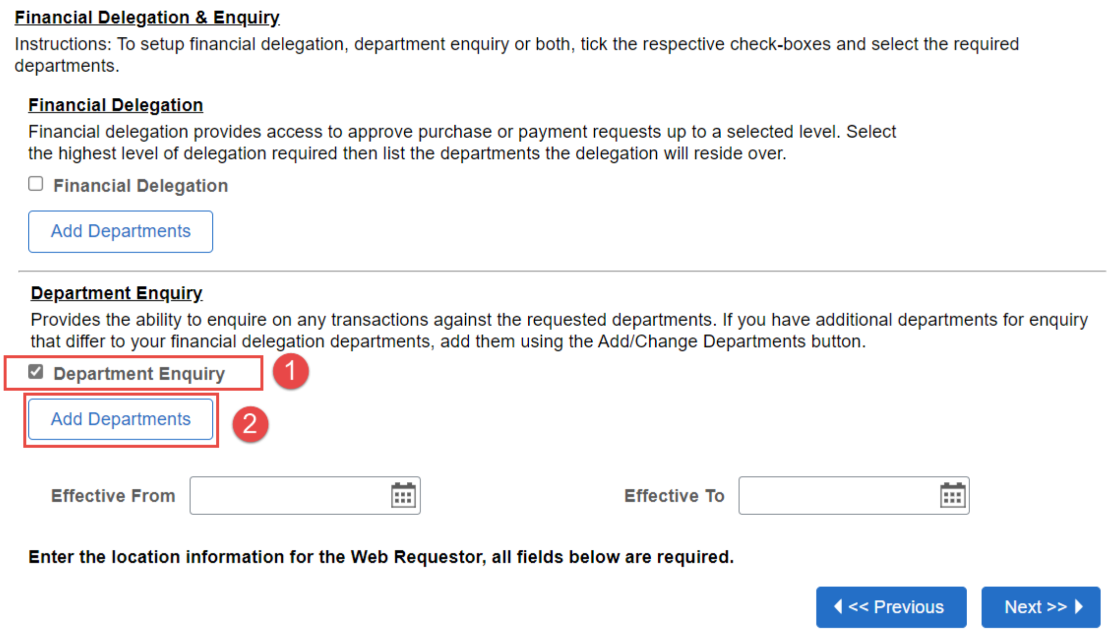
Department enquiry only – new access

This option will show how to request department enquiry without financial delegation.

Step 1: Tick the checkbox *Department Enquiry*.

Step 2: Click the *Add/Change Departments* button to enter the department selector.

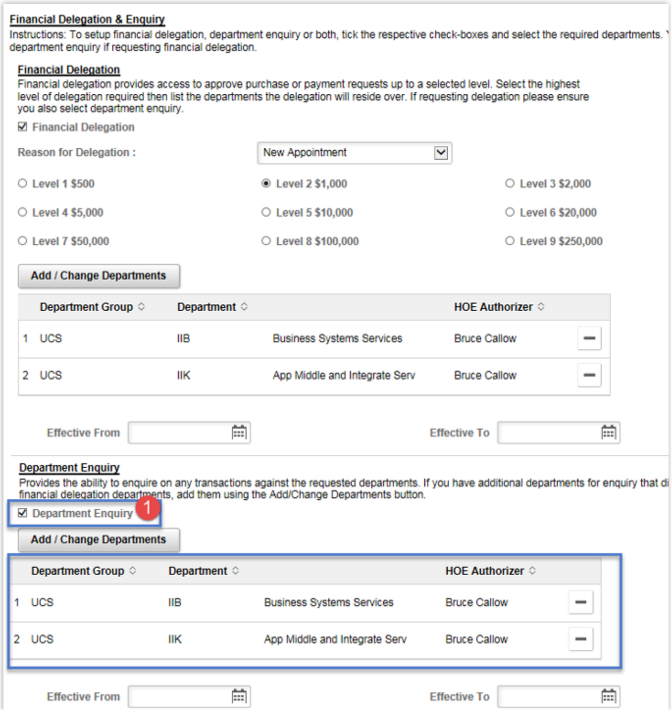
Step 3 Follow steps 4-7 from pages 7-8 above for selection of departments from the department selector.



Department enquiry with delegation – same departments – new access

This option will show how to request department enquiry using the same departments entered for delegation when there is no existing delegation for the user.

Step 1: After entering all required data for the delegation request, tick the checkbox for *Department Enquiry.* This will auto-populate the enquiry grid.



Note: The enquiry department grid will be the same as the delegation grid.

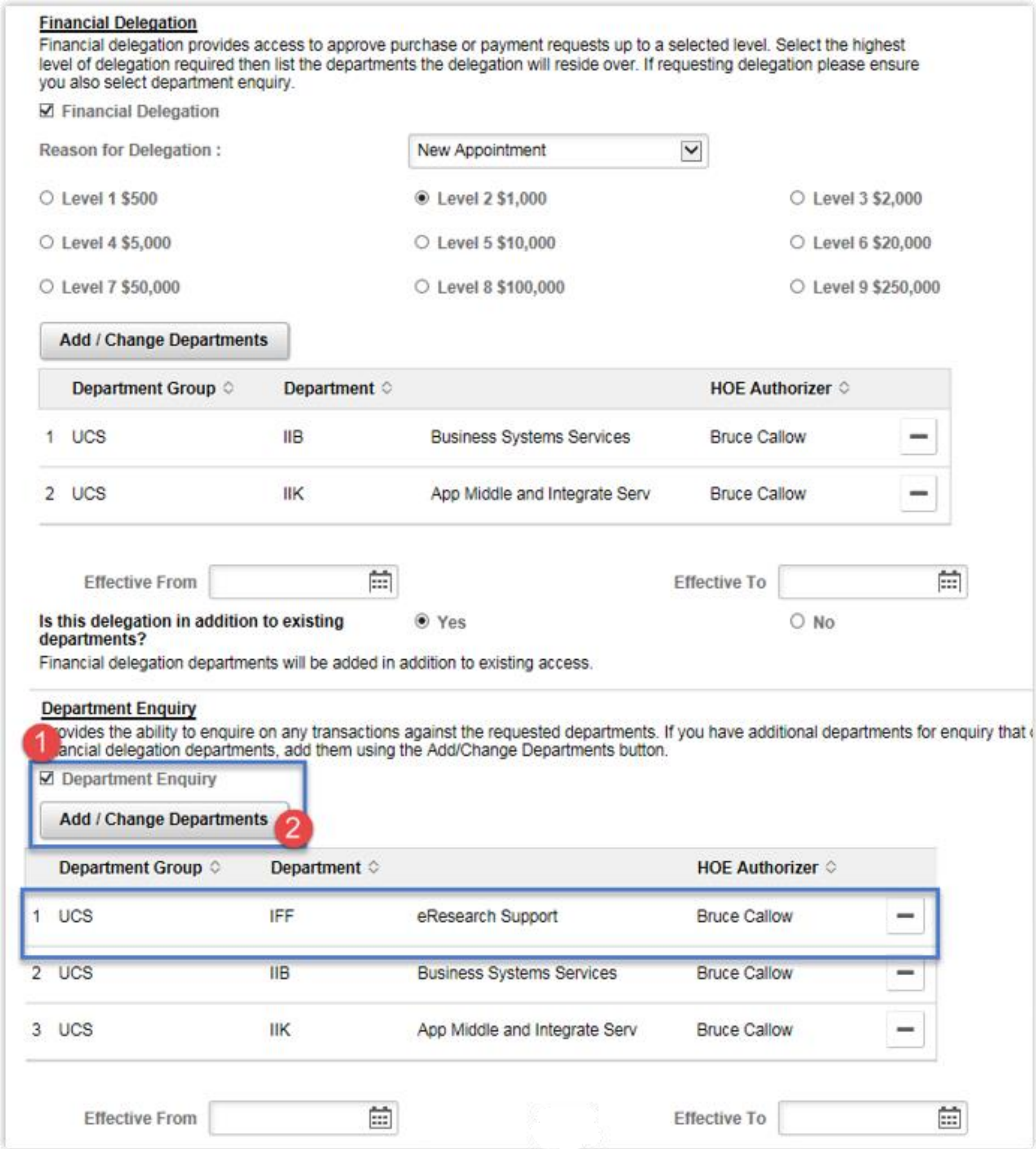
Department enquiry with delegation – additional enquiry departments – new access

This option will show how to request department enquiry using the same departments entered for delegation, then adding further departments for enquiry.

Step 1: Tick the checkbox *Department Enquiry* This will auto-populate the enquiry grid.

Step 2: Press the *Add/Change Department* button that appears below the department enquiry checkbox.

Step 3: Follow steps 4-7 from page 7-8 above for selection of departments from the department selector. Once selection is complete, you'll notice the additional departments within the enquiry grid.



Upon selection of the required departments and pressing OK, the request screen will update to show the departments. You can then select the Effective from and Effective to dates.

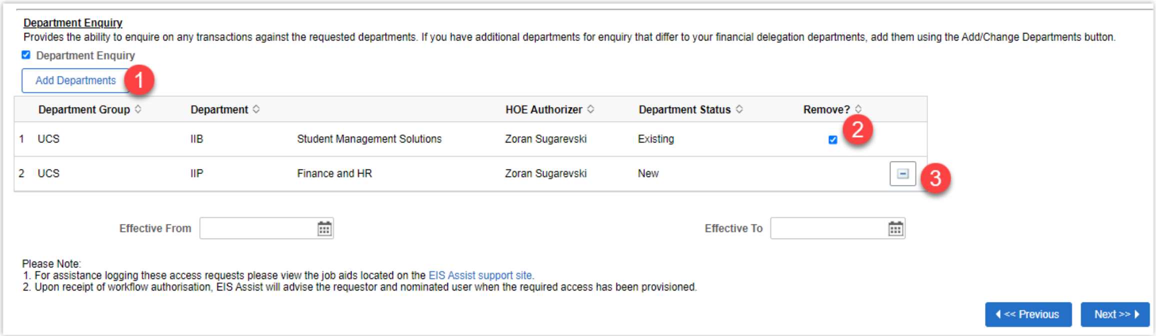
Department enquiry – existing access

To modify existing department enquiry access for a user, follow the below steps;

Step 1: Add additional departments using the *Add Departments* button.

Step 2: Remove any existing departments if no longer required.

Step 4: Use the *minus row* button in the department grid to remove any mistakenly added new departments.



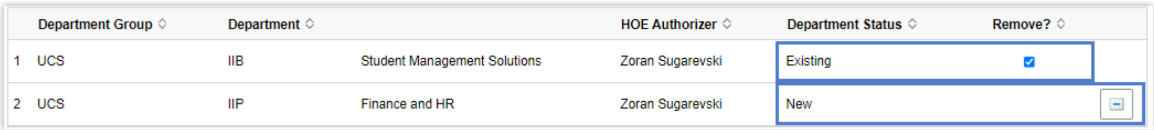
Adding or removing departments from the request screen

Adding departments

To add further departments to your request, simply click the *Add/Change Department* button and use the department Selector. Follow steps 4-7 from page 7-8 above for selection of departments.

Removing departments

If a department is existing you can tick the *Remove* checkbox for that department, if a department has just been added to the request you can press the *minus row* button.



Head of Element authorisers

Delegation and enquiry requests must first be approved by an appropriate department head. The request page will display the department head (*HoE Authoriser*) found for each selected department and route workflow to that authoriser upon submission of the form. Selection of authoriser is possible where multiple authorisers have been found, simply click the look up and select an appropriate authoriser from the list if necessary.

It is possible that a variation of the following combinations may occur when finding HoE Authoriser.

Scenario	Occurs When	User Action
Exact approver match found	An approver is found at or above the department within the direct hierarchy of the tree.	No action required by the user.
Multiple possible approvers	More than one approver found at or above the department in	User can select between the most appropriate listed authorisers.

	the direct hierarchy of the tree.	
Multiple Possible Approvers – Outside direct department hierarchy	No authoriser is found within the direct hierarch of the department. All authorisers under that group for the selected department are brought back for selection.	User can select the most appropriate listed authoriser. If no suitable option, select "*No Relevant Approver*". This will then progress through exceptions management.
No Match Found	The program couldn't find any authoriser for the selected department. This will occur when a selected department doesn't exist in the HR tree, or a group level department is selected.	No action required, "*No Relevant Approver"* will display for the *HoE Authoriser* field. This will progress through exceptions management.

Effective from / to dates.

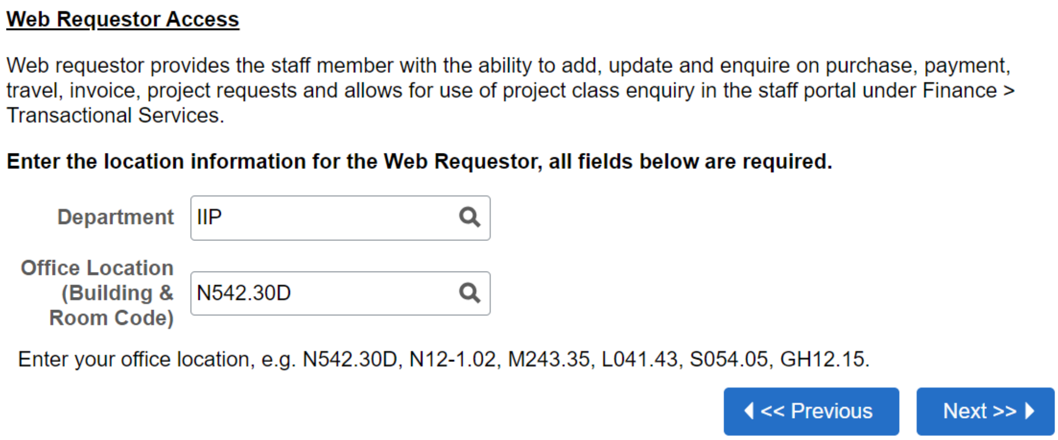
If access is required for a known time frame, such as a fixed term contract or secondment, enter the *Effective From/To* date fields by clicking on the date look up and selecting the required dates.

Progressing the Request

Once you have filled out the financial delegation and department enquiry access section press the ***Next*** button. If you need to go back at any time and change the request, simply navigate back by pressing the ***Previous*** button in the lower right of the page (**don't use the browser back button**).

Web requestor access page

Web requestor access provides staff with the ability to add, update, and enquiry on, purchase, payment, invoice and project requests in the Staff Portal under *Finance*. It would also provide access to project class enquiry. The Web Requestor access page requires the user to enter the *Location* (building and room number) for the person obtaining access. The *department* field is auto populated from the welcome page, and it is the department of the person obtaining access. Once all required information is entered on the page press the ***Next*** button to proceed through the request.

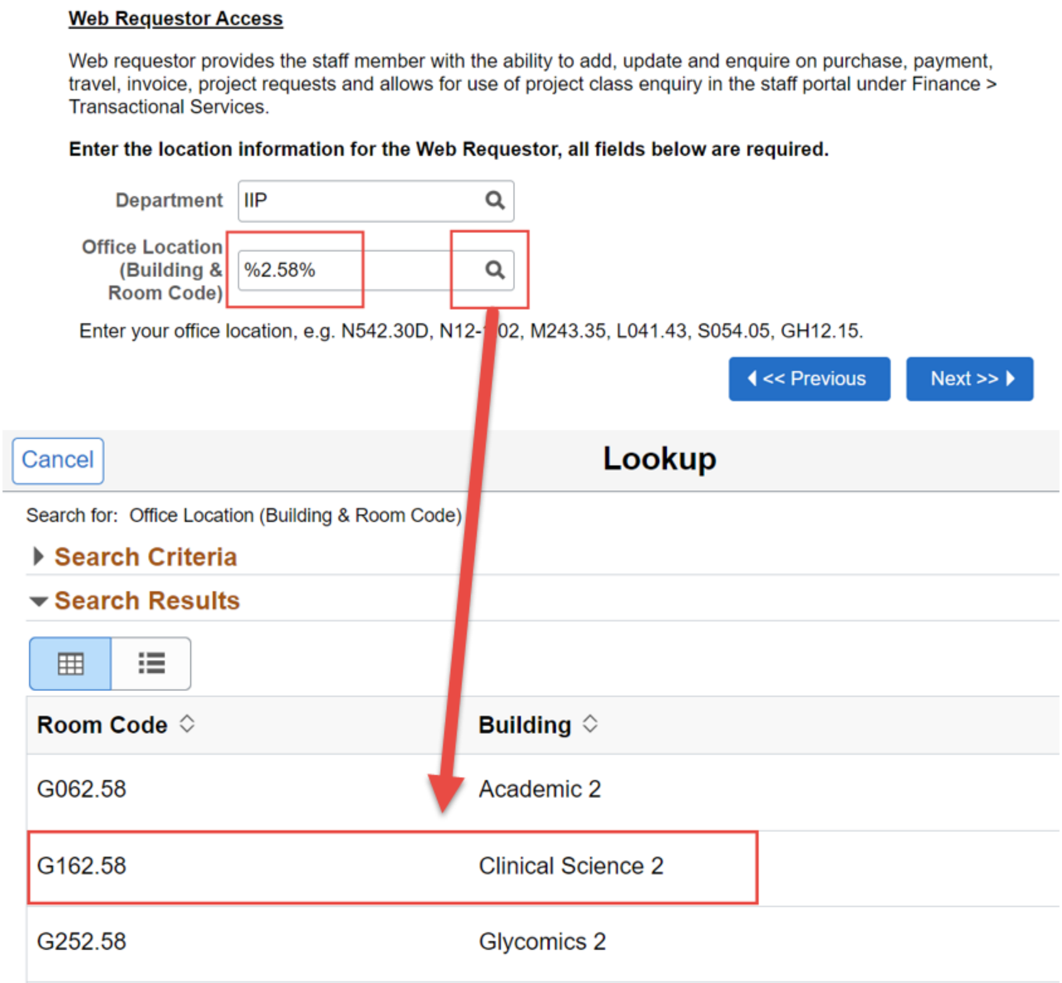


Selecting location

Configuration for web requestor requires the location of the person obtaining the access. Location format is made up of building letter, number, floor level and room number. For example, room 30D on level 2 of the University Centre/Bray Centre (N54) is **N542.30D**. If unsure of the location, you can find it by visiting Space Aid – on the Space Management site.

Quick searching location

A fast approach to searching for location is to use wild card characters surrounding the room number. For example, if your room number is 2.58 you could enter ***%2.58%*** into the location field and press the ***look up*** button. This will display a list of possible matches for selection.



Search for location using the look up fields

You can also search location using the look up and searching via room code or building, changing the operators to *contains* will assist with search results.

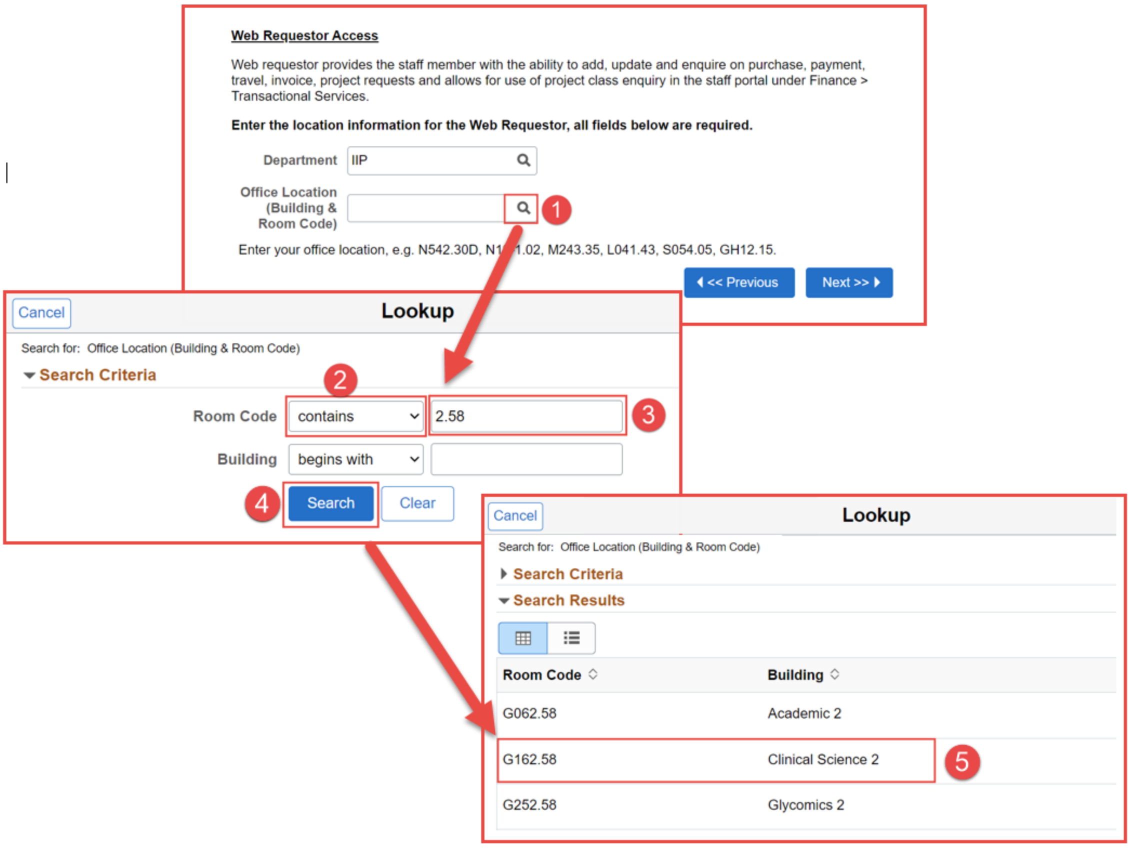
Step 1: Click on the *Office Location (Building & Room Code)* look up button.

Step 2: Change the Room Code or Building operator to *Contains*.

Step 3: Enter the *Room Code* or *Building*.

Step 4: After entering the room code or building press the *Search* button.

Step 5: Select the relevant location in the *Search Results* list.


Web Requestor Access
Web requestor provides the staff member with the ability to add, update and enquire on purchase, payment, travel, invoice, project requests and allows for use of project class enquiry in the staff portal under Finance > Transactional Services.
Enter the location information for the Web Requestor, all fields below are required.
Department
IIP
Office Location (Building & Room Code)
1
Enter your office location, e.g. N542.30D, N1 1.02, M243.35, L041.43, S054.05, GH12.15.
<< Previous
Next >>
Cancel
Lookup
Search for: Office Location (Building & Room Code)
Search Criteria
2
Room Code
contains
2.58
3
Building
begins with
4
Search
Clear
Cancel
Lookup
Search for: Office Location (Building & Room Code)
Search Criteria
Search Results
Room Code
Building
G062.58
Academic 2
G162.58
Clinical Science 2
5
G252.58
Glycomics 2

Review and submit request.

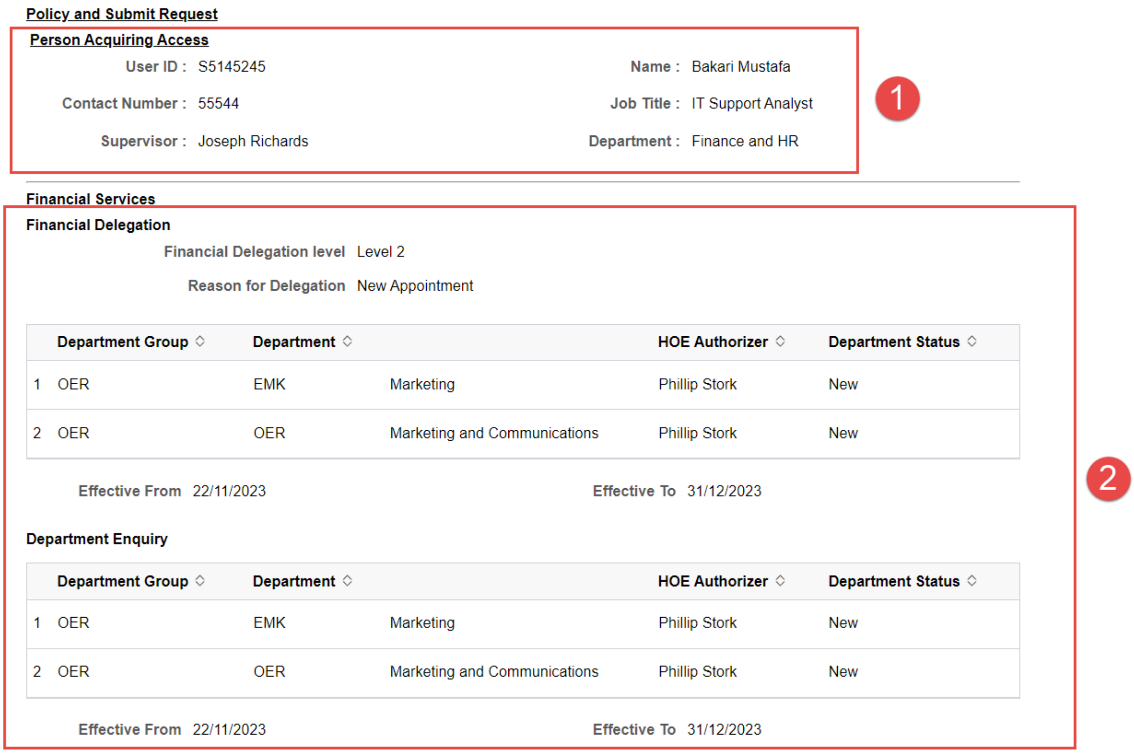
The *Review and Submit Request* page shows an overview of what has been requested on previous pages prior to submitting the request. The request summary page has many important sections that should be checked prior to submitting your request.

Step 1: Review the *Person Acquiring Access* section to ensure the correct person has been entered on the form.

Step 2: Review the *Financial Services Access Summary* section to ensure requested access is correct.

Step 3: Read the polices and tick the *Agree to the Policy* checkbox. This section provides links to relevant policies and provides a required agreement checkbox that must be ticked prior to submitting your request.

Step 4: Submit the request by pressing the ***Submit Request*** button in the lower right of the page.



Policy and Submit Request

Person Acquiring Access

User ID : S5145245

Name : Bakari Mustafa

Contact Number : 55544

Job Title : IT Support Analyst

Supervisor : Joseph Richards

Department : Finance and HR

1

Financial Services

Financial Delegation

Financial Delegation level Level 2

Reason for Delegation New Appointment

	Department Group	Department		HOE Authorizer	Department Status
1	OER	EMK	Marketing	Phillip Stork	New
2	OER	OER	Marketing and Communications	Phillip Stork	New

Effective From 22/11/2023

Effective To 31/12/2023

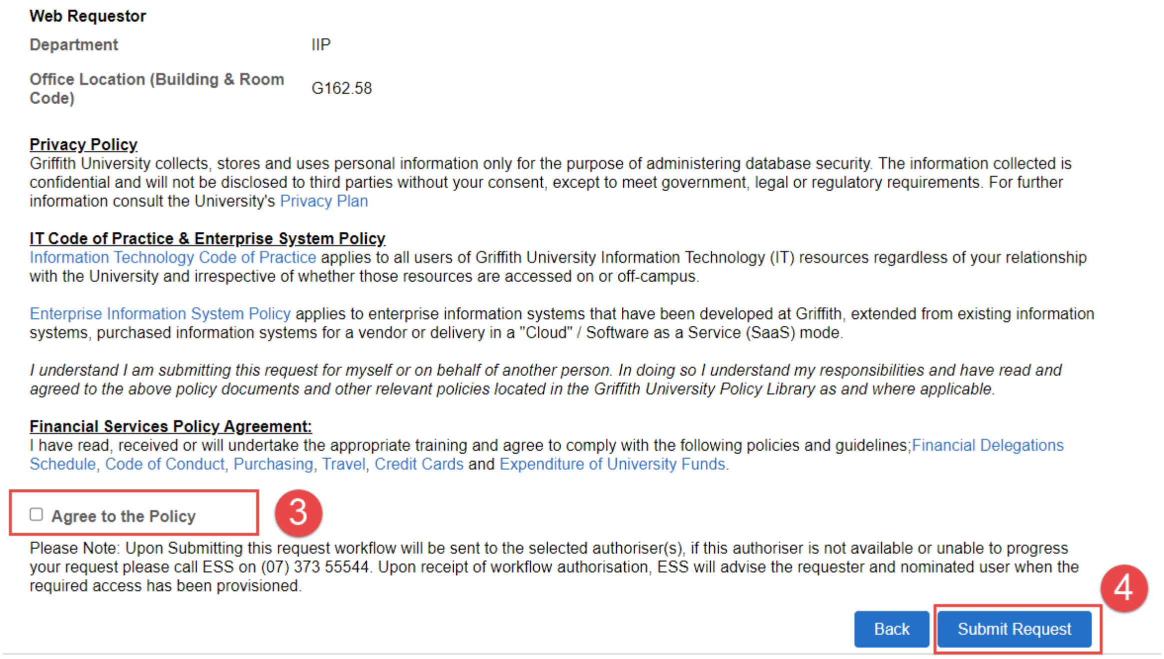
2

Department Enquiry

	Department Group	Department		HOE Authorizer	Department Status
1	OER	EMK	Marketing	Phillip Stork	New
2	OER	OER	Marketing and Communications	Phillip Stork	New

Effective From 22/11/2023

Effective To 31/12/2023



Web Requestor

Department: IIP

Office Location (Building & Room Code): G162.58

Privacy Policy
Griffith University collects, stores and uses personal information only for the purpose of administering database security. The information collected is confidential and will not be disclosed to third parties without your consent, except to meet government, legal or regulatory requirements. For further information consult the University's Privacy Plan

IT Code of Practice & Enterprise System Policy
Information Technology Code of Practice applies to all users of Griffith University Information Technology (IT) resources regardless of your relationship with the University and irrespective of whether those resources are accessed on or off-campus.

Enterprise Information System Policy applies to enterprise information systems that have been developed at Griffith, extended from existing information systems, purchased information systems for a vendor or delivery in a "Cloud" / Software as a Service (SaaS) mode.

I understand I am submitting this request for myself or on behalf of another person. In doing so I understand my responsibilities and have read and agreed to the above policy documents and other relevant policies located in the Griffith University Policy Library as and where applicable.

Financial Services Policy Agreement:
I have read, received or will undertake the appropriate training and agree to comply with the following policies and guidelines;Financial Delegations Schedule, Code of Conduct, Purchasing, Travel, Credit Cards and Expenditure of University Funds.

Agree to the Policy

3

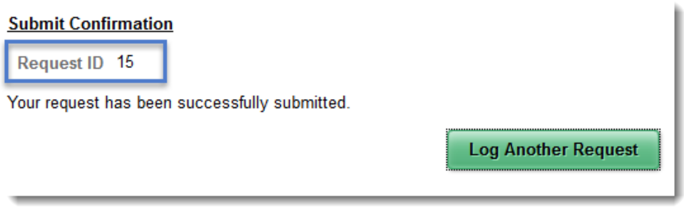
Please Note: Upon Submitting this request workflow will be sent to the selected authoriser(s), if this authoriser is not available or unable to progress your request please call ESS on (07) 373 55544. Upon receipt of workflow authorisation, ESS will advise the requester and nominated user when the required access has been provisioned.

4

Back | Submit Request

Submit confirmation page

The Submit Confirmation page contains the unique request ID. Please take note of the request ID, as this is important for any future enquiries on your request. From this page, you can click the ***Log Another Request*** button to start a new instance of the form or press the home icon in the top right to navigate back to the My Staff Pages home screen.



Submit Confirmation

Request ID 15

Your request has been successfully submitted.

Log Another Request

Navigating through the request

At any time throughout the request, you can navigate back or forward to check or change what you are requesting. Simply navigate through the wizard using the *Previous*, *Next*, or *Back* buttons on the lower right corner of the page. You can change any part of your request before submission using this navigation and modifying access as required.

(Reminder: don't use the browser back and forward buttons while using PeopleSoft as this will take you out of the wizard and a new form instance will need to be started.)

Approval Workflow

The online PeopleSoft Access Form utilises workflow to obtain authorisation for access to financial delegation and department enquiry. After the completed access form is submitted, workflow is initiated.

In some cases, staff will request financial delegation and department enquiry for more than one department. Approvers can approve or deny all requested departments, or if necessary, approve some departments while denying others.

Departments progress to the next stage as they are approved and are not held back by departments that are still pending a decision or by denied departments. Once workflow is complete, access is provisioned for the approved departments and notification sent to the requestor and acquiring user confirming the provisioned access.

Financial delegation workflow

Workflow for Financial Delegation is a 4-step process for the selected departments.

Step 1: Head of School or Head of Element (Job Code list).

Step 2: Financial Business Partner Approval.

Step 3: Training approval, training must have been attended and tracked.

Step 4: Deputy CFO when delegation level is 1 ($500) to 5 ($10,000), and CFO when delegation is equal or greater than level 6 ($20,000).

Department enquiry workflow

Workflow for Department Enquiry will be a 3-step process for the selected department.

Step 1: Head of School or Head of Element (Job Code list).

Step 2: Finance Business Partner Approval

Step 3: Training approval, training must have been attended and tracked.

There is no workflow required for Web Requestor. All subsequent transactions performed by a user with Web Requestor access requires independent approval workflow of its own.

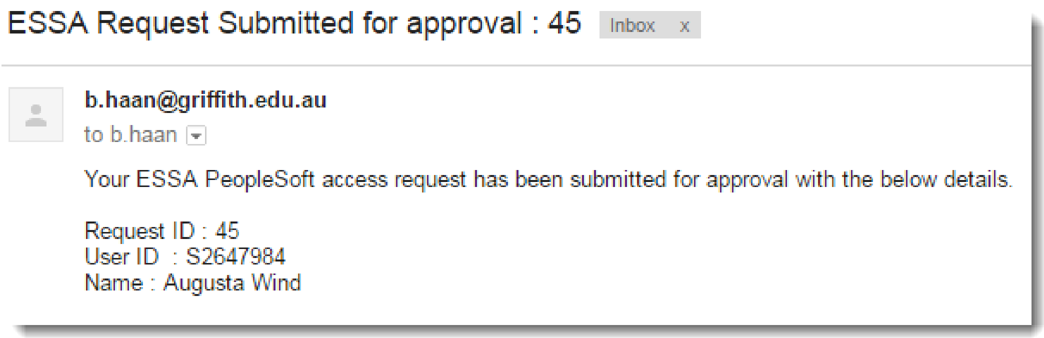
Once Web Requestor has been submitted it is auto-provisioned overnight.

Communications throughout the request

Throughout the request, notifications will be sent to the requester, nominated acquiring user and selected authorisers at key progress points.

Request submission notification

When the requester has submitted an access request, an email notification is sent to the requester advising of the submitted request. This notification contains the request ID and the acquiring user details, no further details of the request are included in this notification.


ESSA Request Submitted for approval : 45 Inbox x

b.haan@griffith.edu.au
to b.haan

Your ESSA PeopleSoft access request has been submitted for approval with the below details.

Request ID : 45
User ID : S2647984
Name : Augusta Wind

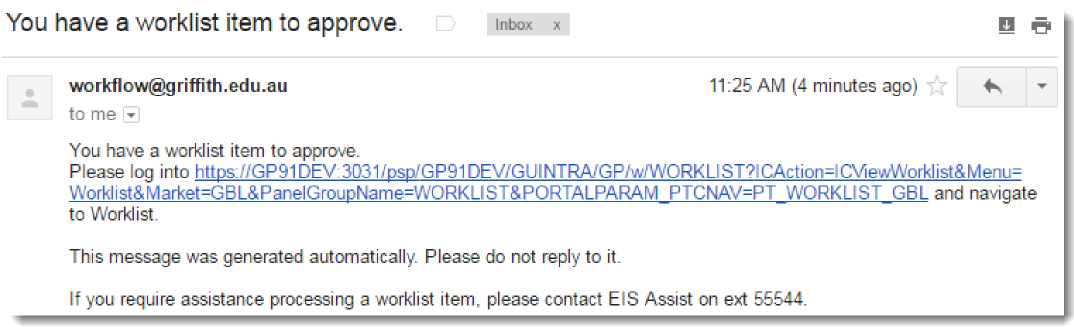
Service desk tool notifications

Shortly after the request has been submitted, a new service desk ticket will be logged, and notification sent advising the requester of ticket creation.

From this ticket, the requester and acquiring users will be notified of request progression. As approval and provisioning occur, ESS will send emails to the requester and acquiring user. Once all aspects of a request are actioned a resolution notification will be sent from the service desk tool.

Workflow notification

The nominated authoriser(s) for the request will receive a standard workflow notification each day at 2pm, advising of a pending worklist item. The authoriser can click on the link to be taken directly to the Griffith staff portal worklist.


You have a worklist item to approve. Inbox x

workflow@griffith.edu.au 11:25 AM (4 minutes ago)
to me

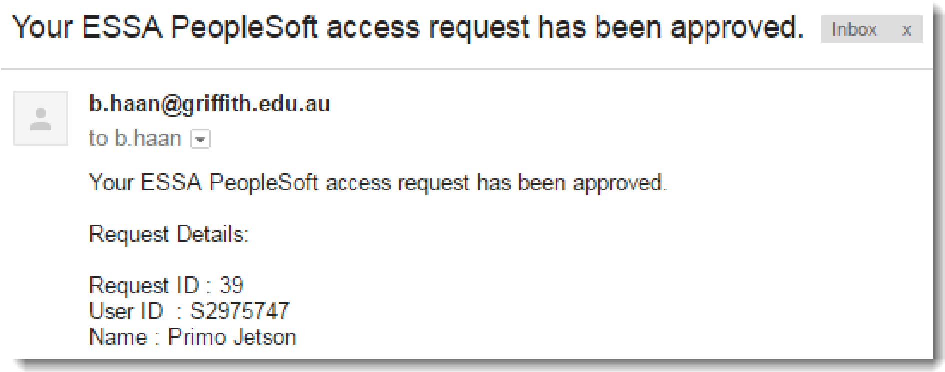
You have a worklist item to approve.
Please log into https://GP91DEV:3031/psp/GP91DEV/GUINTRA/GP/w/WORKLIST?ICAction=ICViewWorklist&Menu=Worklist&Market=GBL&PanelGroupName=WORKLIST&PORTALPARAM_PTCNAV=PT_WORKLIST_GBL and navigate to Worklist.

This message was generated automatically. Please do not reply to it.

If you require assistance processing a worklist item, please contact EIS Assist on ext 55544.

Workflow Approved Notification

After all workflow steps have completed and approval has been granted, notification will be sent to the requesting user advising of the approved workflow. ESS will now provision the approved access and update the service desk ticket.


Your ESSA PeopleSoft access request has been approved. Inbox x

b.haan@griffith.edu.au
to b.haan

Your ESSA PeopleSoft access request has been approved.

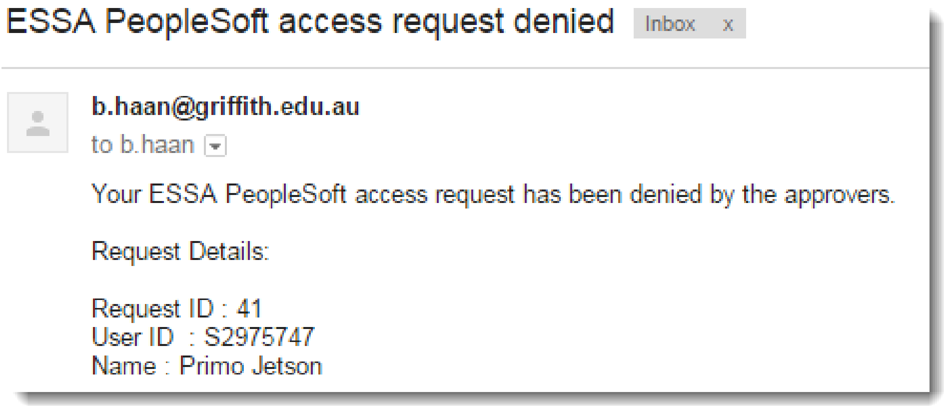
Request Details:

Request ID : 39
User ID : S2975747
Name : Primo Jetson

Workflow Denied Notification

If an authoriser denies a request completely, notification will be sent to the requesting user advising of the denial. ESS will update and close the service desk ticket.

Please note, a subset of requested departments can be denied while the approved departments will progress. The subset of denied departments don't generate denied notifications, this only occurs if all departments in the request are denied.


ESSA PeopleSoft access request denied Inbox x

b.haan@griffith.edu.au
to b.haan

Your ESSA PeopleSoft access request has been denied by the approvers.

Request Details:

Request ID : 41
User ID : S2975747
Name : Primo Jetson

Financial Services FAQ

What happens after I submit my request?

Once a request is submitted it will workflow to the specified authoriser(s) for review and decision. If the request is approved, it will be auto-provision overnight or at the effective from date. If a request has multiple workflow items (departments) to different authorisers, access can be provisioned as workflow items are approved. Departments pending approval won't delay provisioning of approved departments.

I only received access to some of my requested departments.

If you've requested multiple departments for delegation or enquiry, some of those departments may have been denied during the workflow. Departments can be approved or denied at any step of the approval process, but only approved departments continue through to the end of the workflow and are provisioned for access.

How to find building/room numbers using Space Aid

To assist with entering the required information for Web Requestor access, you can use Griffith University Space Management site. Space Aid - Inventory will allow you to search by Buildings and floor plans, then locate your room number from the floor plans.

Why does "No Relevant Approver" appear under HoE Authoriser?

No Relevant Approver will appear when requested departments for delegation or enquiry under the following circumstances.

1. The selected department is a top-level department in the Finance tree. All top-level departments such as HTH or UCS, are currently managed by exception and don't route to any matching authorisers with matching job codes.
2. The selected department doesn't have an authoriser matching one of the approved job codes for authorising step one of the workflows. The application will then find any authorisers under that group level within the tree. The list of authorisers displayed will contain the option of "No Relevant Approver", allowing the user this choice if they don't see a person they recognise as appropriate for approval.

Enquiring upon the progress of my request

If you have submitted a request and need to enquire on the progress, please navigate to the IT Service Centre Portal: https://serviceportal.griffith.edu.au/ and click on *My Account*. This will list your current requests, find the related PeopleSoft access request in the list, click on it, and add a comment requesting a progress update.

Changing authoriser after submitting a request

If you need to change the authoriser who has received the workflow for your request (potentially due to authoriser absence), navigate to the IT Service Centre Portal: https://serviceportal.griffith.edu.au/ and click on *My Account*. This will list your current requests, find the related PeopleSoft access request in the list, click on it, and add a comment requesting a change of authoriser. ESS can then evaluate and re-route the workflow to the specified or alternative authoriser as necessary.

How do I change project ownership?

For change of project owner contact your Finance Business Partner. For assistance finding your Finance Business Partner refer to Find your Financial Business Partner.