PeopleSoft – Financial Services Access

PeopleSoft Financial Services Access

How-to Approve / Deny Requests

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Contents

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PeopleSoft financial service approvals

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. As an approver, you can approve or deny all requested departments, or if necessary, you may also 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.

The following sections define the workflow steps for financial delegation and department enquiry, then show how to action an approval.

Workflow for financial delegation & department enquiry

Workflow for financial delegation is a 4-step process for the selected departments.

Step 1: Head of School or Head of Element

Step 2: Finance Business Partner

Step 3: Training approval, completion of relevant training must be approved.

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).

Workflow for department enquiry is a 3-step process for the selected departments.

Step 1: Head of School or Head of Element

Step 2: Finance Business Partner

Step 3: Training approval, completion of relevant training must be approved.

Workflow for department enquiry when UNI (All University Departments) is selected.

Step 1: Financial Control team

Step 2: Training approval, completion of relevant training must be approved.

Head of Element authorisers

Delegation and enquiry requests must first be approved by an appropriate department head. Head of Element authorisers are determined by a set of job codes. The job codes authorised to approve at step one of delegation and enquiry are Pro Vice Chancellor (Academic), PVC/Vice President, Deputy Vice Chancellor, Provost, Dean Academic, Dean, Head of School, Office Director, Research Centre Director, and Director Research Centre.

Finance Business Partner authorisers

Once Head of Element workflow is complete, approved departments will route to the Finance Business Partner for further review. Each requested department will route to the Finance Business Partner responsible for that group. They will review the request and approve or deny departments as appropriate.

Training authorisers

Before approval can continue the user obtaining access must complete relevant financial training. Once financial training has been attended the training authorisers will approve the request. This will complete the workflow for department enquiry access. Financial delegation requests will continue to step 4 – Deputy/CFO approval.

Deputy CFO – Delegation levels 1 - 5

If delegation level 1 ($500) through to 5 ($10,000) has been requested, final approval must be obtained before provisioning of access occurs. The Deputy Chief Financial Officer will review the request and approve or deny as necessary. This is the final approval stage for any financial delegation requests at this level and provisioning of access will commence upon approval.

CFO – Delegation levels 6 - 9

If delegation level 6 ($20,000) through to 9 ($250,000) has been requested, final approval must be obtained before provisioning of access occurs. The Chief Financial Officer will review the request and approve or deny as necessary. This is the final approval stage for any financial delegation requests at this level and provisioning of access will commence upon approval.

Accessing worklist items for approval

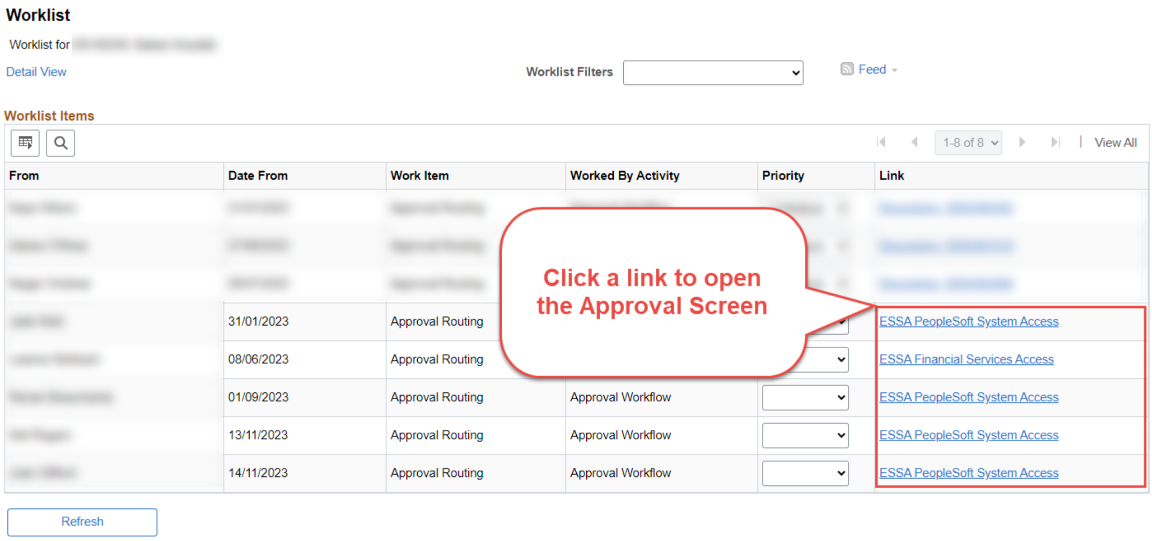
You can access PeopleSoft Access Requests worklist items from email, Griffith Staff Portal worklists or the PeopleSoft Request Approval page within **My Staff Pages.**

1. Directly through worklists;
    a. From daily worklist email links, which open the Staff Portal worklist page.
    b. From the Staff Portal worklist page, ***Staff Portal > Key Services > Worklist***.
2. From the PeopleSoft Request Approval page within ***My Staff Page > Reports and System Access Tile > System Access > PeopleSoft Request Approvals***.

Daily worklist reminders & Staff portal worklist

When a PeopleSoft access request has been submitted the selected authorisers for that request will receive the usual reminder email at 2pm. Clicking on the link within the worklist email will take you to the Griffith Staff Portal worklist. Clicking on any of the ***ESSA Financial Services Access*** worklist items will navigate the approver into the approval page for the selected request.

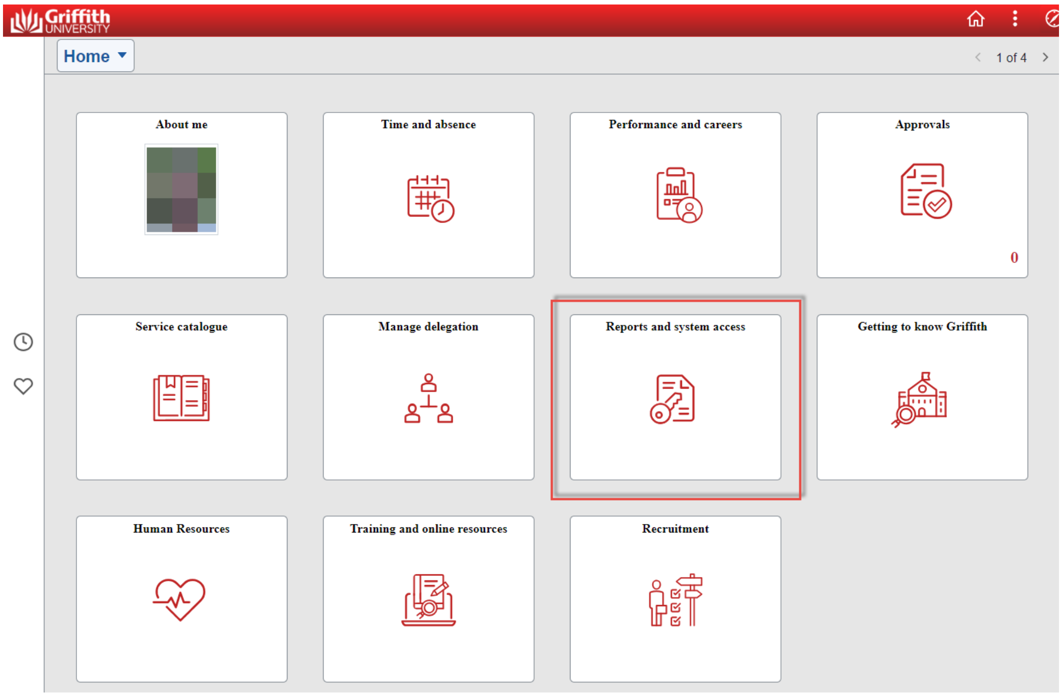
To action the request from this list simply click on one of the links. This will take you directly into the request details where you can approve or deny the request.

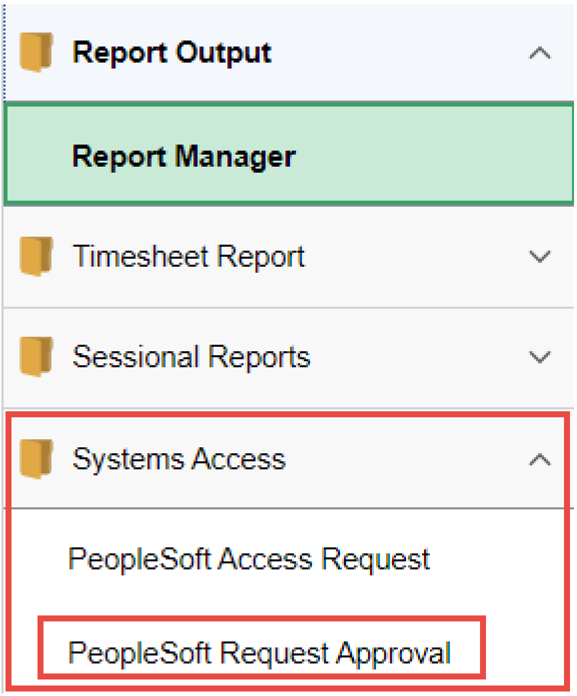


PeopleSoft access approval screen

The PeopleSoft Request Approval screen shows a listing of all pending PeopleSoft and Financial Services Access Request approvals. From this page, you can open any outstanding approvals and action as appropriate.

The PeopleSoft Request Approvals page is located within My Staff Page and is accessible to all authorisers. To use the page, 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 Request Approval***.



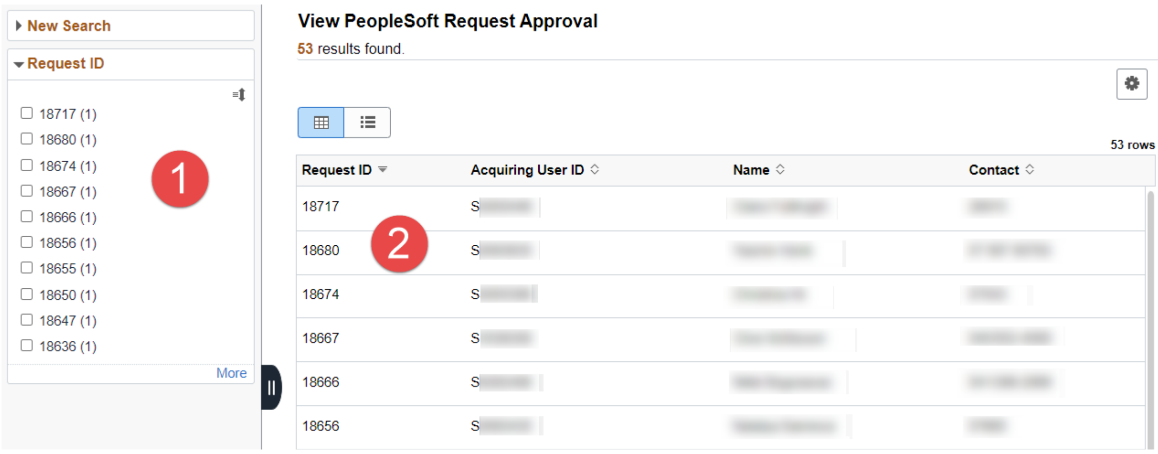


This will open the list of pending approvals on the right-hand side of the page.

The approval page lists all pending access requests, showing the Request ID number, and acquiring user details. From here, select any listed requests to open and action the approval.

Step 1: You can filter what requests are visible in the list by ticking the checkboxes under the Request ID section of the left-hand navigation.

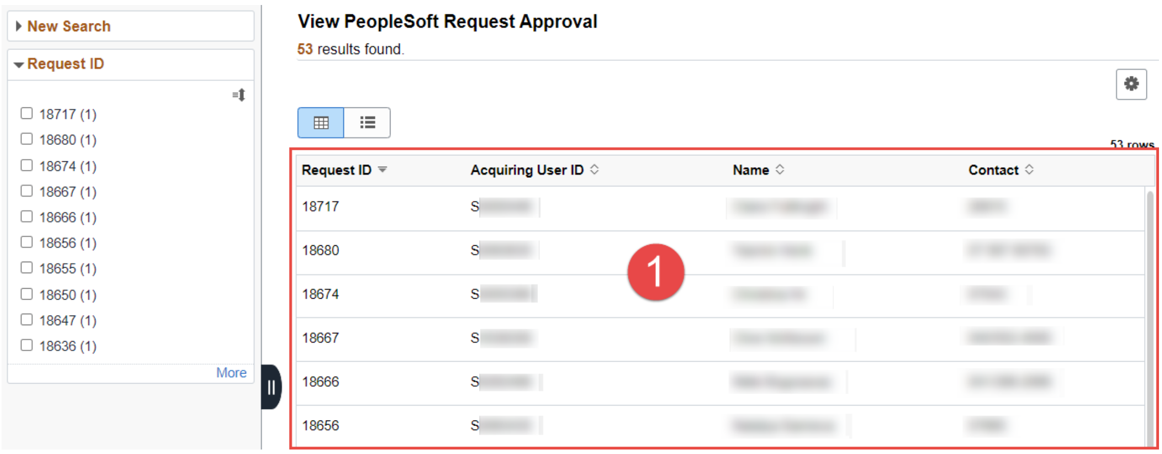
Step 2: Click on a Request ID row to open the details for that request.



Refreshing the worklist item list

To refresh the pending worklist items on the PeopleSoft Request Approval page, simply scroll down the request grid.

Step 1: Scroll down the request grid and the page will update automatically.



Request authorisation

Approving requests

The *Request Approval* page shows an overview of the requestor, acquiring user details and includes a listing of the departments requested. This page has a number of important sections that should be noted / reviewed prior to approving or denying the request.

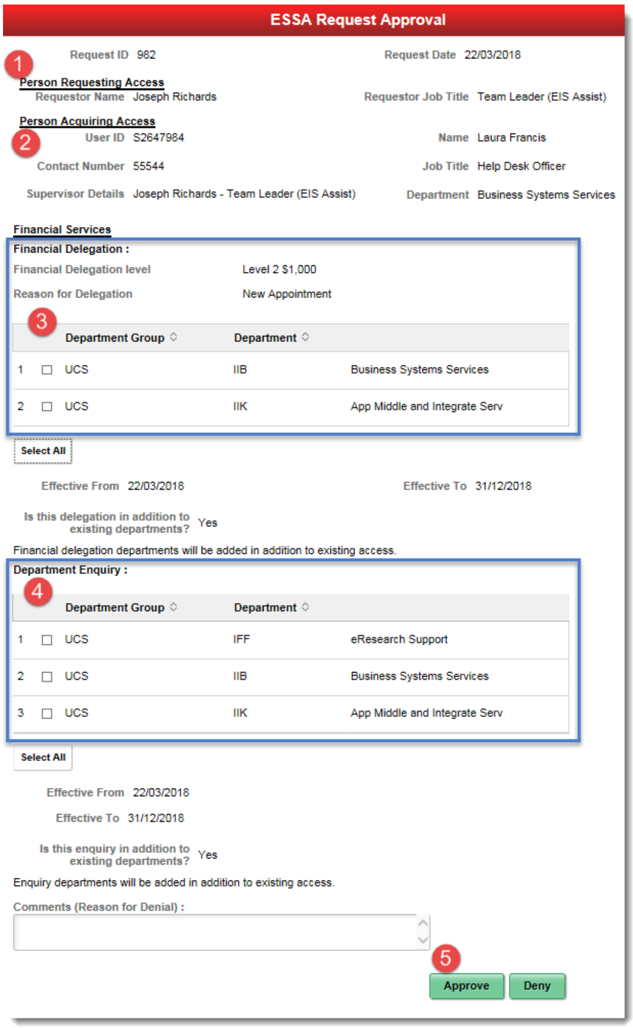
<u>Step 1</u>: Review the requesting user details, this is the person that logged the request and will in most cases be the supervisor of the person acquiring access.

<u>Step 2</u>: Review the acquiring user details, this is the person you are approving or denying access for.

<u>Step 3</u>: Review the requested financial delegation level and listed delegation departments.

<u>Step 4</u>: Review the requested list of enquiry departments. In most cases this will be the same listed departments as delegation grid above, with possible additional enquiry departments requested.

<u>Step 5</u>: Once reviewed and ready to progress, tick the checkbox for each department or press *Select All* button under each grid, and press the ***Approve*** button in the lower right of the page.



ESSA Request Approval

1

Request ID 982 — Request Date 22/03/2018

Person Requesting Access

Requestor Name Joseph Richards — Requestor Job Title Team Leader (EIS Assist)

Person Acquiring Access

2

User ID S2647984 — Name Laura Francis

Contact Number 55544 — Job Title Help Desk Officer

Supervisor Details Joseph Richards - Team Leader (EIS Assist) — Department Business Systems Services

Financial Services

Financial Delegation :

Financial Delegation level: Level 2 $1,000

Reason for Delegation: New Appointment

3

		Department Group	Department	
1	☐	UCS	IIB	Business Systems Services
2	☐	UCS	IIK	App Middle and Integrate Serv

Select All

Effective From 22/03/2018 — Effective To 31/12/2018

Is this delegation in addition to existing departments? Yes

Financial delegation departments will be added in addition to existing access.

Department Enquiry :

4

		Department Group	Department	
1	☐	UCS	IFF	eResearch Support
2	☐	UCS	IIB	Business Systems Services
3	☐	UCS	IIK	App Middle and Integrate Serv

Select All

Effective From 22/03/2018

Effective To 31/12/2018

Is this enquiry in addition to existing departments? Yes

Enquiry departments will be added in addition to existing access.

Comments (Reason for Denial) :

5

Approve Deny

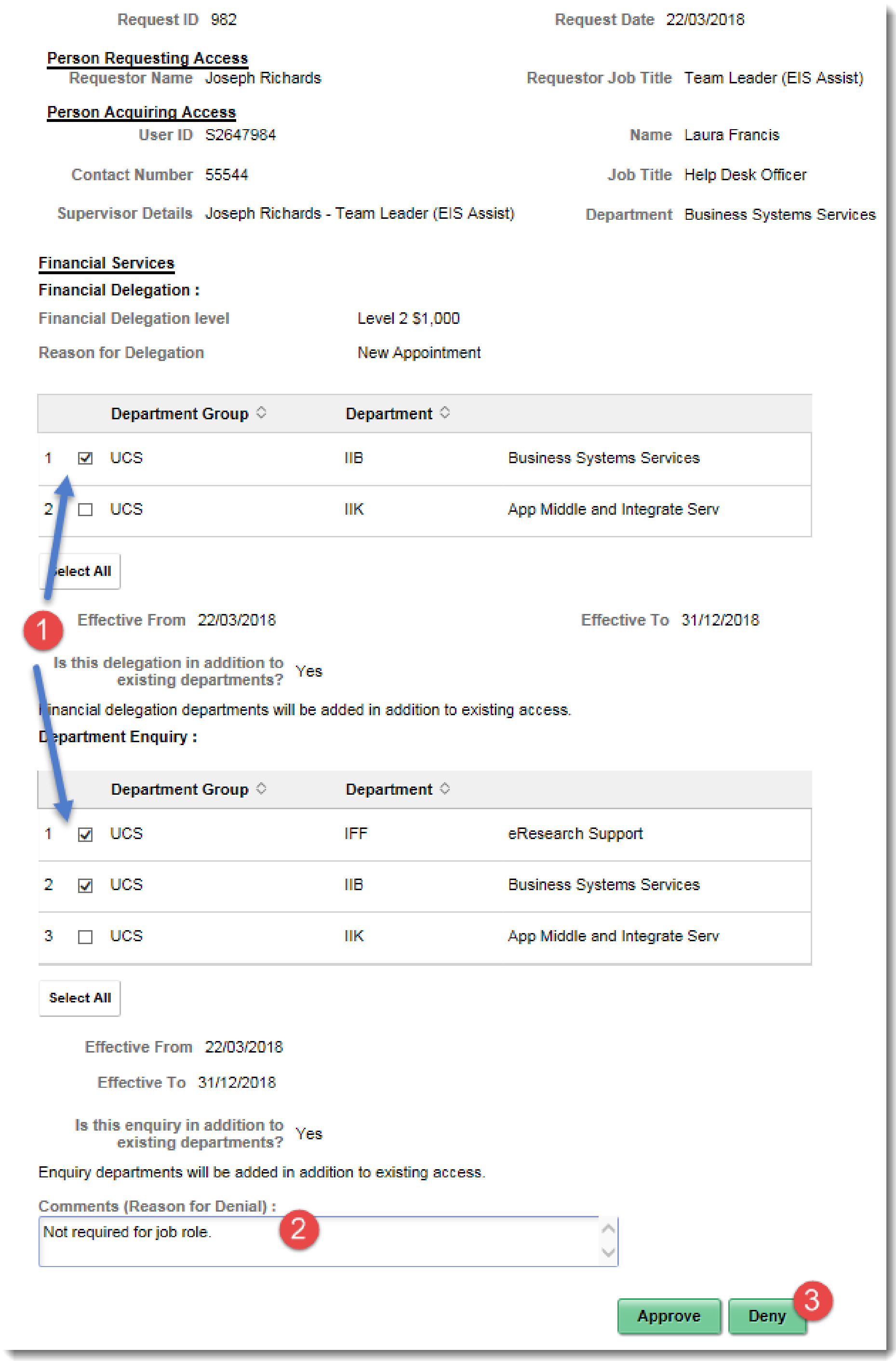
Denying requests

The *Request Approval* page allows an approver to deny access if necessary. Prior to denying a request the authoriser must enter comments providing a reason for denying the access.

Step 1: Review the request and tick the checkboxes corresponding to the departments to deny.

Step 2: Enter the reason for denying the requested role in the *Comments* field.

Step 3: Press the ***Deny*** button in the lower right of the page.



Request ID 982 Request Date 22/03/2018

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Person Acquiring Access
User ID S2647984 Name Laura Francis
Contact Number 55544 Job Title Help Desk Officer
Supervisor Details Joseph Richards - Team Leader (EIS Assist) Department Business Systems Services

Financial Services
Financial Delegation :
Financial Delegation level Level 2 $1,000
Reason for Delegation New Appointment

		Department Group	Department	
1	☑	UCS	IIB	Business Systems Services
2	☐	UCS	IIK	App Middle and Integrate Serv

Select All

1

Effective From 22/03/2018 Effective To 31/12/2018
Is this delegation in addition to existing departments? Yes
Financial delegation departments will be added in addition to existing access.
Department Enquiry :

		Department Group	Department	
1	☑	UCS	IFF	eResearch Support
2	☑	UCS	IIB	Business Systems Services
3	☐	UCS	IIK	App Middle and Integrate Serv

Select All

Effective From 22/03/2018
Effective To 31/12/2018
Is this enquiry in addition to existing departments? Yes
Enquiry departments will be added in addition to existing access.
Comments (Reason for Denial) :
Not required for job role. 2

Approve Deny 3

Approving and denying a request

For requests with multiple departments, you may want to approve some departments and choose to deny others. To do this, simply select the departments you wish to approve and press the **Approve** button. For the remaining departments, select the corresponding checkboxes and press the **Deny** button.

Only departments that have been approved will progress to the next step of the workflow.

At any stage of the approval process, a requested department can be denied while the remaining approved departments will continue through workflow until complete.

Viewing Approval History

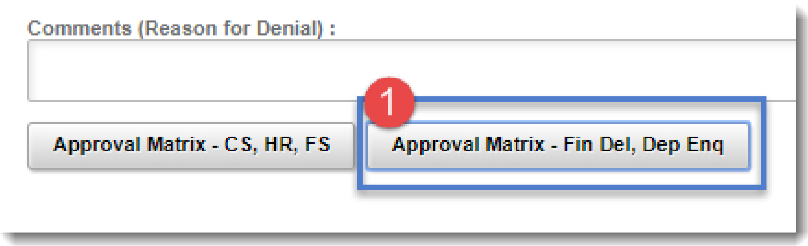
Each approval page contains an *Approval Matrix* button that can be used to view the workflow history of the request. This can be used to see who has approved at each step of the approval and any comments made throughout the workflow history.

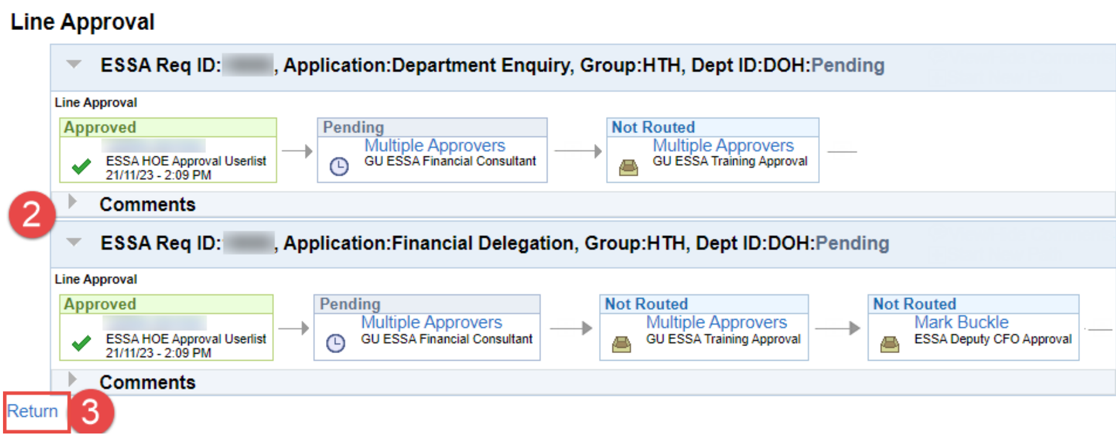
If you are approving at step 2 or 3 for Department Enquiry, or at step 2, 3, or 4 or Financial Delegation, you will be able to see who has approved prior to you.

Step 1: Press the ***Approval Matrix – Fin Del, Dep Enq*** button to view the approval history for the current request. This button is towards the bottom of the page under the Comments field.

Step 2: View who approved each step, any comments made, or click ***Multiple Approvers*** to see list of authorisers pending approval.

Step 3: Click ***Return*** in the bottom left to close the approval history page.





FAQ

How do I re-route an approval?

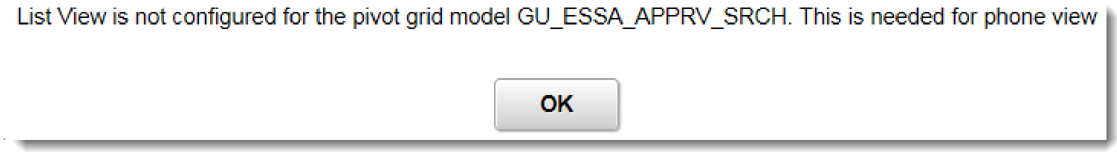
As an authoriser, if you find there is a requirement to re-route an approval, provide the Request ID to ESS via email (ess@griffith.edu.au) and inform which authoriser should receive the workflow. An ESS IT Support Analyst can re-route the workflow to the specified authoriser as necessary.

If I'm unsure of access - What do I do?

In a scenario where you are unsure if access is appropriate to approve for an acquiring user, the best course of action is to contact the requester and discuss the access details with them. In most cases the requester is the supervisor for the acquiring users and should be able to answer any questions about their reasons for access and requirements. Alternatively, contact your Finance Business Partner for further discussion.

Error message: "List View is not configured" …

When navigating to the PeopleSoft Access Approvals page, if you receive an error message stating "*List view is not configured for the pivot grid model GU_ESSA_APPRV_SRCH*", you will need to clear your browser cache to resolve the error.



You can view instructions for clearing cache below.

How to clear your browser cache

I can't navigate back to the PeopleSoft Request Approval screen.

If you can't see the ***Reports*** button on the top left of the page when you action a request, you have navigated to it from the staff portal or My Staff Page worklist page rather than the PeopleSoft Access Approvals page. To be able to navigate back to the list of pending approvals navigate to the PeopleSoft Access Approvals page within My Staff Pages and action your pending approvals from there.

Navigation: ***My Staff Page > click Reports and System Access Tile > System Access > PeopleSoft Access Approvals***.

Error Message: "Optimistic lock "

When trying to approve departments for delegation or enquiry you may encounter the following error message, *"Optimistic lock exception at %1. Please refresh the page try the same operation again."*

Optimistic lock exception at %1. Please refresh the page try the same operation again.
EOAW_CORE.Utils.OnExecute Name:ThrowOptimisticLockException PCPC:26420 Statement:619
Called from:EOAW_CORE.ENGINE.AppInst.OnExecute Name:SaveAdHocs Statement:44
Called from:EOAW_CORE.ApprovalManager.OnExecute Name:DoApprove Statement:89
Called from:GU_ESSA_APPR_FL.GBL.SavePostChange Statement:90

This can occur when an authoriser at the same stage of the approval has already approved a department which you are currently trying to authorise yourself. To fix this simply navigate back to the approval page, press the **refresh** button and then back into the request again. This will now display any remaining departments that require approval.