CMS Account Request for Finance Dashboard

Log into My Cal Poly Portal.

From the Single Click Links

Select Technical Service Request
(If this link is not available, click on Edit Links (at the bottom of Single Click Links section), and check the box next to Technical Service Request, then Save.)
Click the Tab labeled **New CMS Account Request** and follow the instructions on the form.

**Request Type:** New User  
**Summary:** Add Finance Dashboard to Security  
**Username:** Enter the username of the person who will be using Finance Dashboards, then click on Lookup Recipient. The rest of the information will autofill.
**Approver Username:** Enter the username of the person to approve this security request, then click on Lookup Approver. The rest of the information will autofill. *Note: Approver must be a Manager, Department Head or higher level.*

Click on Proceed to Step-2
Select the radio button next to “Select to expand PeopleSoft Financials.”

Check the add box for the CFSSL_ZR_DB_FINANCE_USERS Role.

Click on Submit for Approval

The Approver will then receive an email to approve the security request. Once the account request has been approved, it will be sent to the CMS Finance Production and Security Administrator to process.