CMS Account Request for Finance Security

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.

**Requestor Information**

Select the action you are requesting:

- **New User** – *New user that has no Finance Security*
- **Add/Change/Remove (partial) security** – *Existing user that needs a change to their current security*
- **Remove (ALL) security** – *Removes all security due to termination, retirement, change in departments*
Requestor Information:

Add summary description of the request

- CMS Request ID: 13826
- Status: Open

Recipient Information

Recipient – is the person receiving the security.

- Username: Enter the username of the recipient. Username is the part of the email address before the @.
  - vmaijala@calpoly.edu = vmaijala Username.

Click on Lookup Recipient. The rest of the information will automatically complete.

You must check the Usage Agreements box to continue. (The Responsible Use Policy Form is to be kept in the department.)
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**Approver Information**

Approver is the Recipient's manager. Must be MPP or higher.

Enter the Username of the Approver, then click on Lookup Approver. The rest of the information will automatically complete.

**Requestor Information**

Requestor is the person completing the CMS Account Request. This will default to your information.

The Requestor can be changed by entering another Username and clicking on Change Requestor button.
Incumbent / Person with Similar Roles Information

This is helpful if you know the new user should have the same security as a previous employee.

Enter the previous employee’s name here.

Proceed to Step – 2

Review the information on this screen and if everything is correct, click on the Proceed to Step-2 button. If you want to come back and finish the request later, click on the Save button.

Step 2 is where the Roles needed are requested.
Select the radio button next to “Select to expand PeopleSoft Financials.” Security under this section applies to Purchasing, Finance Dashboard, Property Dashboard and Labor Cost Dashboard.

Check the Add box next to the Role(s) needed.

Enter any comments for this request in the text box.

CFSSL_EU_REQUESTOR – This allows users to enter, but not approve requisitions.

Please enter the person who will be the approver for the requisitions in the text box that opens up. If an approver is not entered here, no one will be able to approve this Requestor’s requisitions.
CFSSL_EU_REQUISITION_APPROVAL – This allows users to approve, but not enter requisitions.

Please list the Requesters in the text box below. (We cannot do blanket security for entire departments or colleges. We need the individual names.) If no Requestors are entered, they will not be able to approve requisitions for anyone.

CFSSL_ZR_DB_PAYROLL_ALL – Should only be given to users who manage budget and need access to employee salaries and benefits.

If this Role is requested, DeptID security must also be granted by Human Resources. Click on the expand PeopleSoft Human Resources radio button.

Click on expand PeopleSoft Labor Cost Distribution

Click on expand PeopleSoft Labor Cost Distribution (LCD)

In the text box, list the DeptIDs this person needs access to.
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.