

Submitting a security request for Payroll roles

Step 1 – Request security permissions

Visit tech.calpoly.edu/services/cms-peoplesoft, then click on "Request Security Permissions for HR or CFS" to access SRS

I want to...

- [Request Security Permissions for HR or CFS](#)
- [Schedule a Control-M Job](#)

Step 2 - Click on the Request Type

Once type is selected, the bottom of the page will populate with more options to move forward. (Note: "Other" should not be used for Payroll roles).

CMS Account Request

Save

Cancel

Step 1 of 2 - Request Details

Step 2 of 2 -

Request Details - [click here for HELP](#)

1. Enter all required information and then click Proceed to Step-2 (at bottom of page).
2. To save your work before proceeding to Step-2, select the Save button. You can then open the request.
3. * means field is required

CMS Request ID 16212

Status

Request Information

NOTICE: This form is for CMS (Student, HR Administration, and Finance) and Cal Poly Jobs accounts. If you are requesting an account for the Advance application, please submit an "Account Requests"

Select the CMS Account Request type:

- *Request Type
- New User
 - Add/Change/Remove (partial) current security
 - Remove (ALL) current security
 - Other - describe in description

Save

Cancel

<<>>

Step 3 - Fill in Summary with a short description of request

Example: "Add student approver role" or "Add new absence timekeeper".

Enter short description of request (e.g.; New CMS Request -- jmustang):

*Summary

Step 4 - Fill in Recipient and Approver user name.

Once user name is entered, click on "Lookup Recipient/Approver" and it will populate the information (department, phone number, etc.) of the user. Approver must be an MPP or Department Head . For Department security (for Payroll roles, this applies only to student pay management access) it must be an Admin II or Department Head or higher. Admin I cannot approve department security.

Recipient Information - Individual receiving access

Enter the Recipient's Cal Poly Username (e.g. jmustang):

*Username

Click Lookup Recipient after entering Username:

Lookup Recipient

Full Name

Jane Mustang

Email

jmustang@calpoly.edu

Dept ID

Role

Affiliate

Dept

Phone

Person Type

affiliate

Approver Information - Individual approving access for Recipient

1. ** MUST be filled-in before proceeding to Step- 2

2. Approver must have the role Head of Department or higher and must be available to approve request

Enter the Approver's Cal Poly Username (e.g. jmustang):

** Approver Username

Click Lookup Approver after entering Username:

Lookup Approver

Approver's Name

Approver's Phone

Requestor Information - Individual requesting access for Recipient

Requestor Name

Jennifer Hiatt

Requestor Phone

805/756-5862

Requestor Username

jhiatt

Requestor Email

jhiatt@calpoly.edu

OPTIONAL - Change Requestor (e.g. jmustang):

Change Req Username

OPTIONAL - Click Change Requestor after entering Username:

Change Requestor

Incumbent/Person with Similar Roles Information - (Optional)

If you want/need this Recipient's roles to match the Incumbent or somebody with similar roles, please provide full name.

Incumbent/Similar Person

Incumbent/Similar Person = if this person is replacing someone who has the same security, they should be listed here to assist with identifying access. All steps on the next page still need to be completed even if this is populated.

When complete, click "Proceed to Step-2"

Step 5 - CMS PeopleSoft Human Resources

CMS PeopleSoft Human Resources - includes PS and Dashboard Employee Job, Personal, Contract & Educ. Info., PS LCD, PS Payroll (STUPAY) & Group ID

<-- Click to expand PeopleSoft Human Resources

Dept ID access change required (MUST BE COMPLETED for HR, LCD and Payroll access)

Choose one
Choose one
New/Add Dept access or Role is Hiring Manager
Delete department access
No change in department access

<-- Click to expand PeopleSoft/Dashboard Job, Personal, Contract & Educational Information

▼

Labor Cost Distribution

<-- Click to expand PeopleSoft Labor Cost Distribution (LCD)

▼

Payroll

<-- Click to expand PeopleSoft Payroll

Select the button next to "Click to expand PeopleSoft Human Resources". The drop down that says "Choose one" must be completed.

New/Add Dept access or Role as Hiring Manager = for payroll roles this will only be used for student pay. Select this option and the box to the right will populate to enter the Dept ID. Enter Dept ID(s) here.

<-- Click to expand PeopleSoft Human Resources

Dept ID access change required (MUST BE COMPLETED for HR, LCD and Payroll access)

Enter the Department ID(s) needing change.
Dept ID access will also grant access to child departments.
If any restrictions are required, list below:

New/Add Dept access or Role is Hiring Manager

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Delete Department Access = this will be used if you are removing security

No change in Department Access = this should be selected if only Absence Management or MPC roles are being selected and no student pay.

Step 6 - Click to expand PeopleSoft Payroll

Select "Click to expand PeopleSoft Payroll". A group ID should be entered if they are requesting access for Master Payroll Certification (MPC), Instructional Student Assistant (ISA) Approver, or Absence Management Self Service (AMSS) Timekeeper. More than 1 group can be listed.

Group drop down will have the option for a new group to be created if the user is receiving MPC approval access and is currently in the group they are receiving access to. If that is not the case the option can be left as "Choose one".

Select which role(s) should be added or removed. Any additional notes can be added in the "Other PeopleSoft Payroll access requirements".

<-- Click to expand PeopleSoft Payroll

Group ID Access-Employees CANNOT approve themselves:

NOTE: Group ID Access is associated with Payroll roles that include Master Pay Certification, Absence Information and ISA Pay.

Select option:

Choose one

NOTE: ONLY SELECT ONE CHOICE (Add/Remove) PER ROLE.

Click the Add box for the role(s) you approve for this recipient.

Click the Remove box for the role(s) you want to remove for this recipient.

ADD	REMOVE	Role Name	Role Description
<input type="checkbox"/>	<input type="checkbox"/>	CSU_AM_Timekeeper	Review staff/faculty absences and hours for pay (hourly, overtime) online using Absence Management Self Service by a department timekeeper or supervisor
<input type="checkbox"/>	<input type="checkbox"/>	CSU_AM_Manager	Approve staff/faculty absences and hours for pay (hourly, overtime) online using Absences Management Self Service by a department manager (approver must be MPP or department head)
<input type="checkbox"/>	<input type="checkbox"/>	EUMPC_AP .	Approve Master Payroll Certification (MPC) for salaried employees online by department manager (approver must be MPP or department head)
<input type="checkbox"/>	<input type="checkbox"/>	EUMPC_IN .	Review Master Payroll Certification (MPC) for salaried employees online by department timekeeper or supervisor
<input type="checkbox"/>	<input type="checkbox"/>	SLO_TL_SS_ISAAPP	View and Approve hours worked for Instructional Student Assistants (ISA) online using PeopleSoft Manager Self Service
<input type="checkbox"/>	<input type="checkbox"/>	STUPAY_I .	Hire, Review and Approve hours worked for Student Assistants (SA) online using the Student Pay System

Other PeopleSoft Payroll access requirements:

Other Accounts - includes Cal Poly Jobs (Campus Users Access)

<-- Click to expand Other Accounts

Submit for Approval -- NOTES:

1. If you are done entering information above, select Submit for Approval. An email will be sent to the Approver to take action.

2. If you are not done entering information above, select the Save button to save your work. You can reopen ticket later to finish.

Submit for Approval

Step 7 - Submit for approval

Once submitted, an email with a direct link to the ticket will be sent to the approver. Once approved, it will create the request and send "tasks" off to security analysts for the roles that were selected.

A ticket can contain more than just payroll roles. The requestor can select roles in any of the areas available and they will be rolled into one "request" with "tasks" being triggered for the different area security analysts. If no role is chosen (for instance, a note saying "Student Payroll" is entered and the box by the actual role name is not selected in the screenshot shown above), no task will ever be generated for the Payroll Security Analyst. It would go through as a general ticket and has to be vetted by ITS and can cause a significant delay in how quickly the security can be assigned.