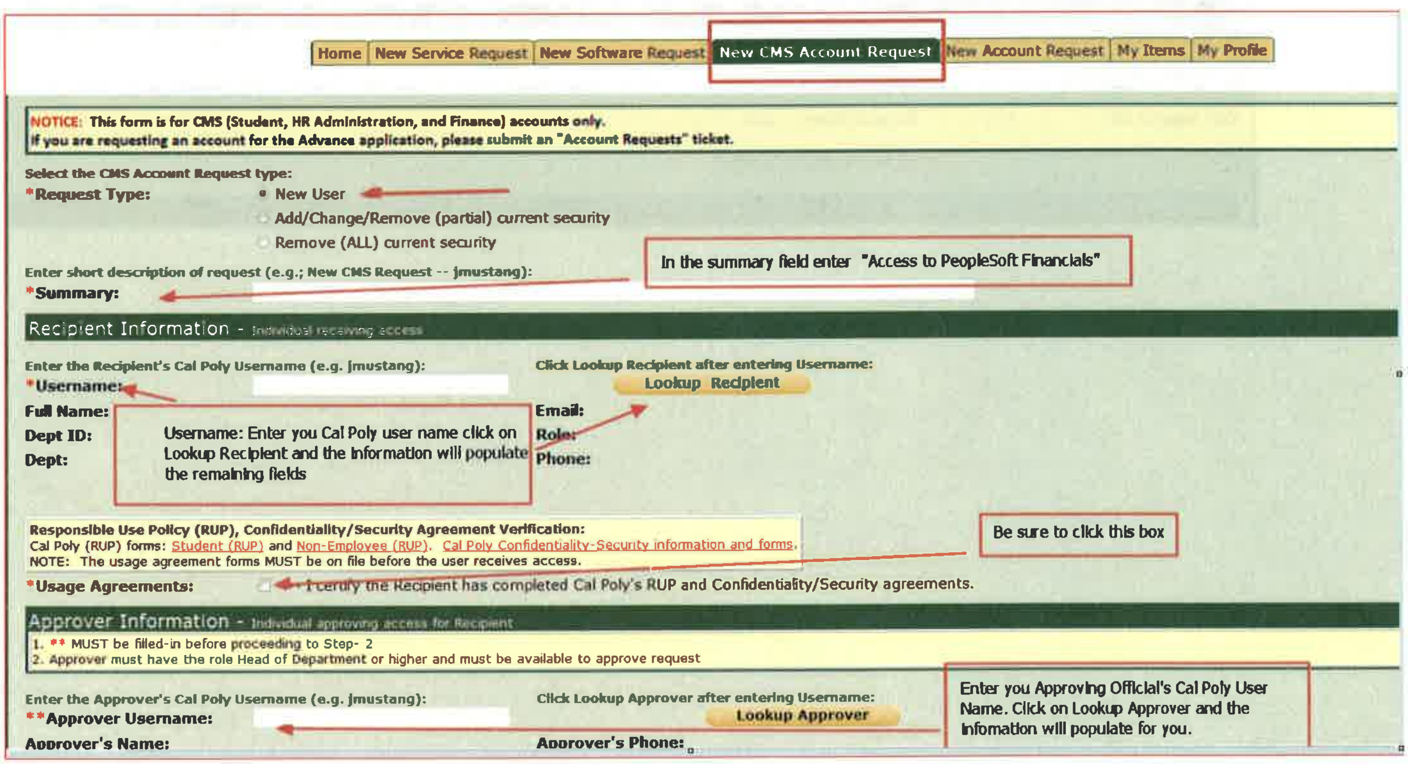
Single Click Access to . . .
edit
Email & Calendar
Student & HR Administration
CSU
CSU Portal- Financial Administration
PolyData Dashboards
Student Assistant Management
MustangJOBS: Job Listings for Students
Electronic Workflow
Technical Service Request
Facilities Requests
Telephone Administration
Email Distribution Lists
4 hidden links
Hide/Show Links



Home
New Service Request
New Software Request
New CMS Account Request
New Account Request
My Items
My Profile
NOTICE: This form is for CMS (Student, HR Administration, and Finance) accounts only.
If you are requesting an account for the Advance application, please submit an "Account Requests" ticket.
Select the CMS Account Request type:
*Request Type:
New User
Add/Change/Remove (partial) current security
Remove (ALL) current security
In the summary field enter "Access to PeopleSoft Financials"
Enter short description of request (e.g.; New CMS Request -- jmustang):
*Summary:
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:
Dept ID:
Dept:
Username: Enter you Cal Poly user name click on Lookup Recipient and the information will populate the remaining fields
Email:
Role:
Phone:
Responsible Use Policy (RUP), Confidentiality/Security Agreement Verification:
Cal Poly (RUP) forms: Student (RUP) and Non-Employee (RUP). Cal Poly Confidentiality-Security information and forms.
NOTE: The usage agreement forms MUST be on file before the user receives access.
Be sure to click this box
*Usage Agreements:
I certify the Recipient has completed Cal Poly's RUP and Confidentiality/Security agreements.
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:
Approver's Name:
Click Lookup Approver after entering Username:
Lookup Approver
Approver's Phone:
Enter you Approving Official's Cal Poly User Name. Click on Lookup Approver and the information will populate for you.

Requestor Username: jepaoluc **Requestor Phone:** 805/756-2234

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:

Enter the name of the person before you who had PeopleSoft Financials

Proceed to Step-2

1. If you are done entering all information above, select **Proceed to Step-2**
2. If you are not done entering all information above, select Finish which will save your work and you can reopen ticket later to finish

Proceed to Step-2

Next | Finish | Finish & New | Cancel

Home | New Service Request | New Software Request | New CMS Account Request | New Account Request | My Items | My Profile

Click tab Step-2 of 2 CMS Role Details
below for Role Selections

Step 1 of 2 - Request Details | Step 2 of 2 - CMS Role Details | Request Summary

Next | Finish | Finish & New | Cancel

Request Details - for HELP click here

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, click Finish. You can then open the request later to complete request.
3. * means field is required

CMS Request ID: 4560 **Request Status:** Open

Change Status to Cancelled

Request Basics

CMS PeopleSoft Financials - includes Budget and Purchasing

<-- Select to expand PeopleSoft Financials

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
☐ ----------	☐ ----------	**CFSSL_EU_FINANCIAL_INQUIRY** .	This Finance role allows Users to have view only access to Accounts Payable, Purchasing, Asset Mgmt, Receiving, General Ledger and Chart of Accounts.
☐ ----------	☐ ----------	**CFSSL_EU_REQUESTOR**	This Finance role allows Users to enter, but not approve, a Requisition.
☐ ----------	☐ ----------	**CFSSL_EU_REQUISITION_APPROVAL**	This Finance Role allows Users to enter and approve requisitions for themselves and other specified Users.
☐ ----------	☐ ----------	CFSCSU_AP_ProCard_02 .	This Role is required for anyone using the Procurement card. It allows Users to view charges, make changes to chartfields, and print your monthly ProCard statement.
☐ ----------	☐ ----------	CFSSL_ZR_DB_FINANCE_USERS .	This Role allows Users access to the Finance Dashboard.
☐ ----------	☐ ----------	CFSSL_ZR_DB_PAYROLL_ALL .	This Role allows Users access to the Labor Cost Dashboard and should only be granted to Users who need access to payroll information.

Other PeopleSoft Financials access requirements: