



Access Request Form Manual

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PS Fin Fundamentals

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Access Request Form

Objective

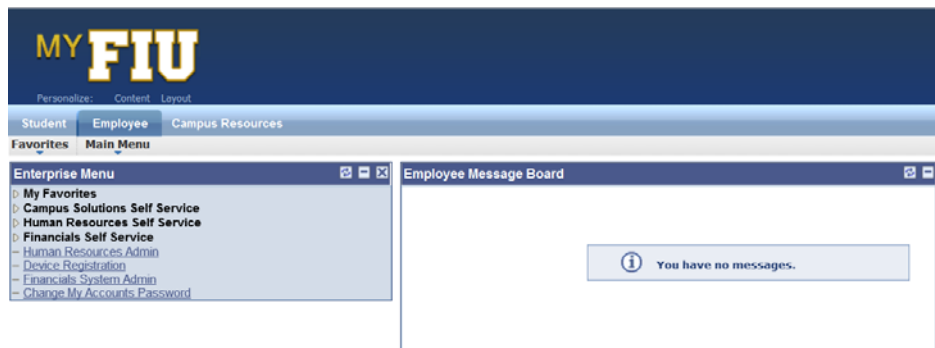
In this topic you will learn how to complete the Access Request Form within Panthersoft Financials & the approvals workflow.

Navigation

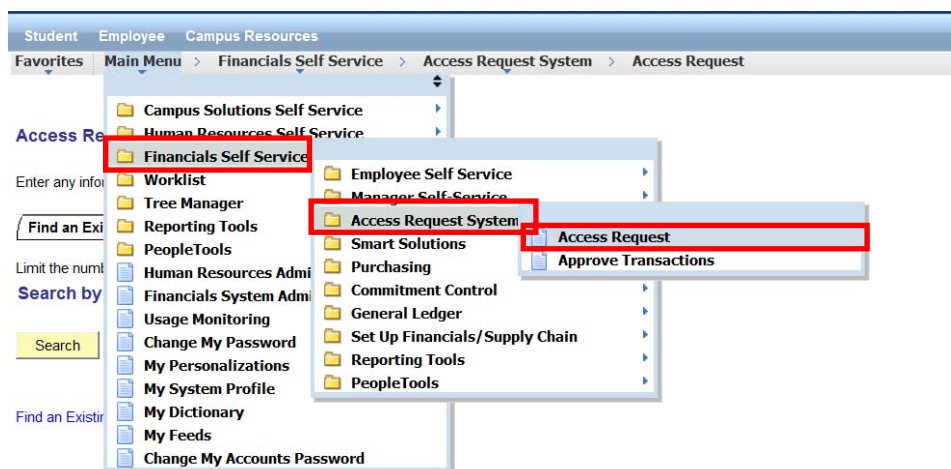
1. Log in <https://my.fiu.edu/> with your credentials



2. Click the **Employee** Tab



3. **Main Menu>Financials Self Service>Access Request System>Access request**



Process

Access Request

Request ID: NEXT

Empl ID:

1. Click “ **Add a New Value**” Tab
2. Enter the “**Employee ID**” & click “ **Add**”

Access Request

Request ID: NEXT Request Status: Not Submitted

Description: New Employee

Empl ID: 1111111 Panther, Pat

Access Group: CM Community Roles

Select

Access Role	Role Description	Access Description
<input checked="" type="checkbox"/> 001	Inquiry and Reporting	Inquiry access to vendor, vo asset, grants and budget da
<input checked="" type="checkbox"/> 002	Requestor Authorization	Create requisitions and ente the department, not in Centr
Enter Additional Information for this Access Role		
	Location	<input type="text" value="1"/>
<input type="checkbox"/> 005	Budget Exceptions Notification	Daily notification of Budget Departments selected.
<input type="checkbox"/> 006	Budget Transfer Initiator	Enter budget transfers for th
<input type="checkbox"/> 007	Budget Transfer Approver	Approve or post budget transfers entered by the Budget Managers for the Departments selected.
<input type="checkbox"/> 012	Student Assistance / Grants & External Award Mgmt	Process grants and external awards to students.

Look Up

Look Up Location

Search by: Location Code begins with

[Advanced Lookup](#)

Search Results

Only the first 300 results of a possible 17882 can be displayed.

View 100 First 1-300 of 300 Last

Location Code	Description
0000000118	OE 0118
0001000010	PC 00010
0001000020	PC 00020
0001000030	PC 00030
0001000040	PC 00040
0001000050	PC 00050
0001000100	PC 00100
0001000101	PC 00101
0001000102	PC 00102
0001000103	PC 00103

3. Select the Access Roles desired

Note: Depending on the access role needed some will require you to enter a department # or a location.

For Expl. Access 005, 006, 007, 017, 018 & 019.

A description must be filled out in order to complete submission.

Process

019 Smart Billing Item UPDATE ONLY Update billing items for Departments selected.

Enter Additional Information for this Access Role

Department	
1	100001000

Comments:

Submit **Approve** **Deny**

4. After completing the form, click “**Submit**”.

Access Request | Approval Status

Access Request

Request ID: 000000009 **Request Status: Pending Approval**

Description: New Employee

5. After submitting the form, you will see the **Request Status** change to “**Pending Approval**”.

Access Request | **Approval Status**

Access Request Approval

REQUEST_ID=0000000010, EMPLID=0001113:Pending

Access Request Approval

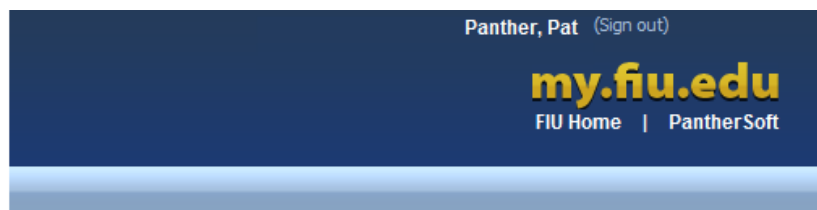
Pending → **Not Routed**

Gold, Roary (HRSupervisor) → Multiple Approvers (FSSSecurityAdmin)

Action History			
Action	Action By	Action Date	Comments
Submitted	Panther, Pat	09/10/13 2:54:42PM	

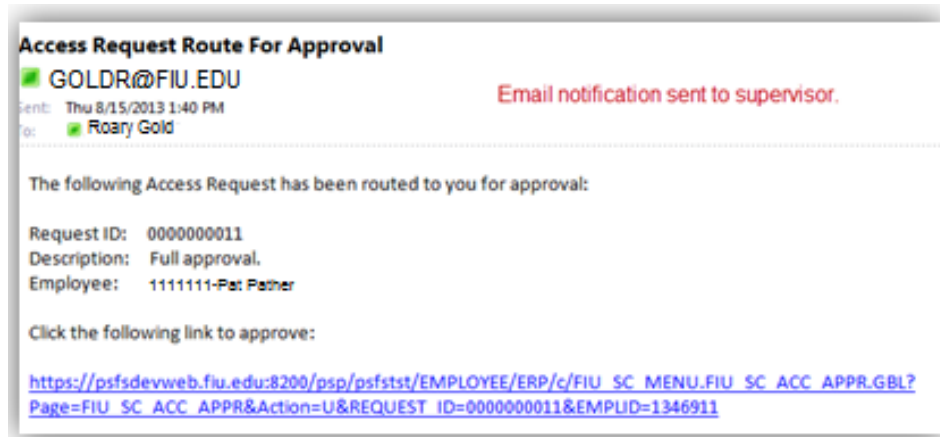
[Access Request](#) | [Approval Status](#)

6. If you click on the tab on top “**Approval Status**”, you will be able to see where in the workflow approval process your request form is placed.

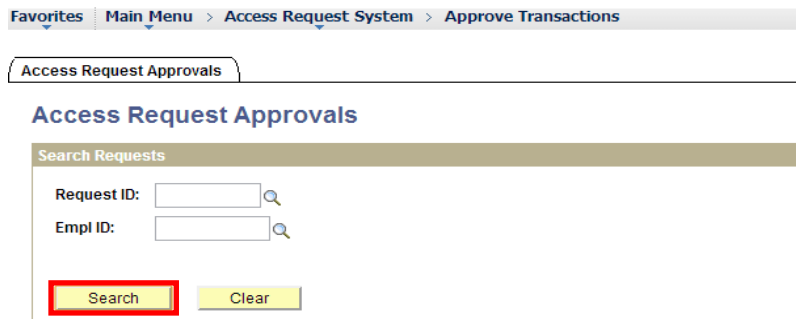


7. After you have completed & submitted the Access Request Form, Sign out

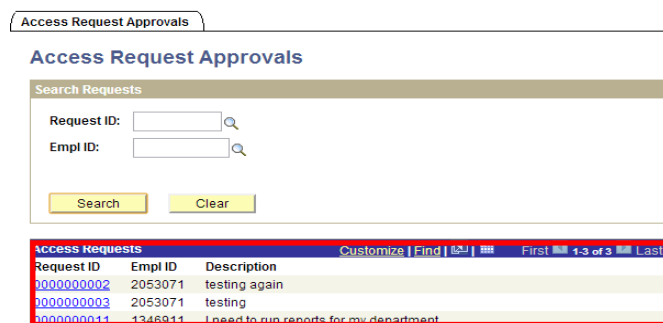
Approver



1. The approver will get an email notification as shown above.
2. Click on “**Search**” to show all on your worklist.



3. Click on the corresponding link



Approver

- Click on **“Approve”** or **“Deny”**

<input type="checkbox"/>	015	Payroll Detail Report / Payroll Transfer	Run payroll detail report and initiate payroll expense transfers.
<input type="checkbox"/>	017	Smart Billing Bill Creator	Create and update bills for Departments selected.
<input type="checkbox"/>	018	Smart Billing Item Creator	Create and update billing items for Departments selected.
<input type="checkbox"/>	019	Smart Billing Item UPDATE ONLY	Update billing items for Departments selected.

Comments:

Access Request Approval FSSS approved

REQUEST_ID=0000000011, EMPLID= 1111111 :Approved

Access Request Approval

Approved

✓ Gold, Roary
HRSupervisor
8/15/2013 - 1:45 PM

→

Approved

✓ Blue, John
FSSSecurityAdmin
8/15/2013 - 1:46 PM

Action	Action By	Action Date	Comments
Submitted	Panther, Pat	08/15/13 1:39:52PM	🗨️
Approved	Gold, Roary	08/15/13 1:45:06PM	🗨️
Approved	Blue, John	08/15/13 1:46:27PM	🗨️
Completed	Blue, John	08/15/13 1:46:28PM	🗨️

- After the approvals process has been completed, the user will receive an email notification that will confirm that access has been granted.