

HOW TO...

A. REQUIREMENTS

Prior to any access being granted, the employee has to acknowledge his/her responsibility for system access and agree to use the systems in a professional manner.

1. Acceptable Use Agreement – a one-time agreement

Before you can submit any requests, user must complete the Acceptable Use Agreement.

<https://request.uaccess.arizona.edu/useragreement/>

2. Elevated Privileges Attestation – requires annual renewal

If the user will have any type of financial oversight responsibility, Elevated Privileges Training must be completed. If the Role will involve viewing SSN/personal information, I9 review/approval, Research proposal approval, Student enrolling/updating career plans, or will require approval of Financial documents, or if user will be a pcard reconciler or holder, this training is needed. The training consists of viewing a short video and at the end of the video, acknowledging that you understand the information provided and that you accept the responsibility <http://www.security.arizona.edu/elevprivtraining> Scroll to the bottom and it provides a link that takes you directly to the training.

At the conclusion of the training, you will be directed to a page that requires you to sign the attestation of compliance with policies. You will receive an email stating that you have completed this training.

3. Fair Labor Standards Act (FLSA)

If the user will be a Time Approver or Time Coordinator, he/she must complete this tutorial.

https://learning.uaccess.arizona.edu/psp/uazelprd/EMPLOYEE/ELM/c/LM_SS_LEARNING.LM_LEARNING_IT_EMS.GBL?LM_CI_ID=1221&LM_ACT_ID=0 ? click enroll ? then click launch.

If “launch” does not work ... user may have to back out and then go to UAccess learning and click the home tab which should take user to screen with various tiles, click on the “MY LEARNING” tile → desired course should now be listed and can be accessed by clicking the title of the course. (*Also, may work better in Chrome than in Firefox.) Once the user completes this the computer will allow them to print the results, a 100% score is required to pass, multiple attempts are allowed.

4. FERPA Tutorial - one-time training for Student data users.

<http://www.registrar.arizona.edu/ferpacourse/>

5. Additional Training

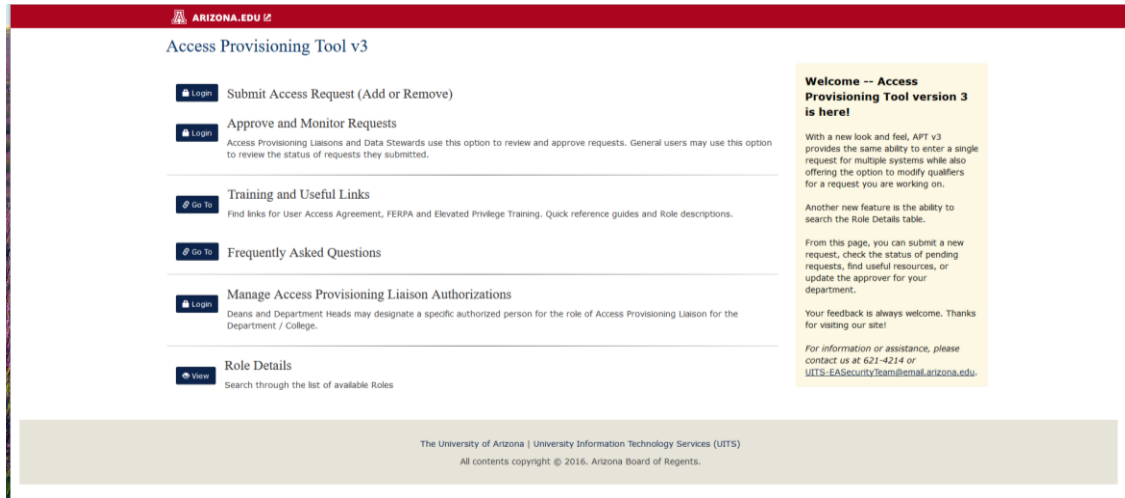
PCard Liaison or Reconciler - If the user will serve in either of these roles, a PCard exam with 100% correct is a requirement. Copied below is the url for the Home Page of Procurement. On the right hand side under Purchasing Card is the link to the policies for review prior to taking the exam, as well as link to exam

<http://www.pacs.arizona.edu/> or you can access exam via UAccess Learning ?

https://learning.uaccess.arizona.edu/psp/uazelprd/EMPLOYEE/ELM/c/LM_SS_LEARNING.LM_LEARNING_IT_EMS.GBL?LM_CI_ID=1012&LM_ACT_ID=0

B. REQUESTS

- Once the employee has completed the validation steps in Section A, access requests can be initiated.
- In the upgraded UAccess Provisioning Tool v3 System, you are able to submit a single request for multiple systems.
- Access the Provisioning Tool at: <https://apt.uaccess-aws2.arizona.edu/>



- Click Login button beside Training and Useful Links for a Quick Reference Guide to submitting requests, or go to http://uits.arizona.edu/sites/default/files/Quick%20Reference%20-%20General%20Steps%20to%20Request%20Access%20in%20APT%20v3_2.pdf.
- Or, you can follow these steps:
 - ✓ Click **Login** button beside **Submit Access Request (Add or Remove)**.
 - ✓ **Create New Request for:** Input NetID (or EmplID or Name or email) of employee needing access; verify you have correct employee when Subject info populates.
 - ✓ Choose an **Access Provisioning Liaison (APL)** to approve your request
 - ✓ **Request Type:** click drop-down arrow and choose *Access Needed for Job Duties*. (If you are removing access to a previously approved role, then you would choose *Access No Longer Needed*.) If prompted, include an effective date. This selection cannot be changed once you have Roles saved to the Request, and if a different request is needed then it will need submitted in a separate request. (i.e. roles can be added in one request, but roles would need removed in a separate request.)
 - ✓ **Request Reason:** Choose appropriate response of either *Department Transfer* or *New Hire or Current Employee*

- ✓ **Business Justification:** List specific job duties the employee has to show legitimate need for these roles for which you are requesting access. *For example, New Business Staff for dept xxxx, establishing access for roles needed in new position; Employee will have Time Coordinator duties for departments xxxx and xxxx; or, employee will initiate Designated Campus Colleague requests for dept xxxx).*

- ✓ Click **Continue to role selection.**

- ✓ **Select Access/Roles:**

For Roles pertinent to CALS Business Staff, see Section C of this document.

>*choose **System** for the first role you are requesting. If you are not sure which System contains the Role(s) you are looking for, click on Roles Details in the upper right corner of page and input brief description and choose from those presented.

>*choose **Subject Area:** choose appropriate to role you will be selecting.

>*Review **Business Justification** and add additional information specific to role(s) selected.

>***Make Selections:** select all Roles needed for this System and Subject by clicking in the box beside each desired role. Roles will show prerequisite flags, if required, and prompts for Row Level Security where you will enter additional information specific to the request, such as department number(s) for which access is needed.

For example, if an employee needs Time Approval access, you would choose System: UAccess Employee-Campus Users, Subject Area: Time and Labor, Role: Time Approver. Provide Department numbers and answer any additional requirements that may populate with your selection.

>*Click **Save.**

At this point you can:

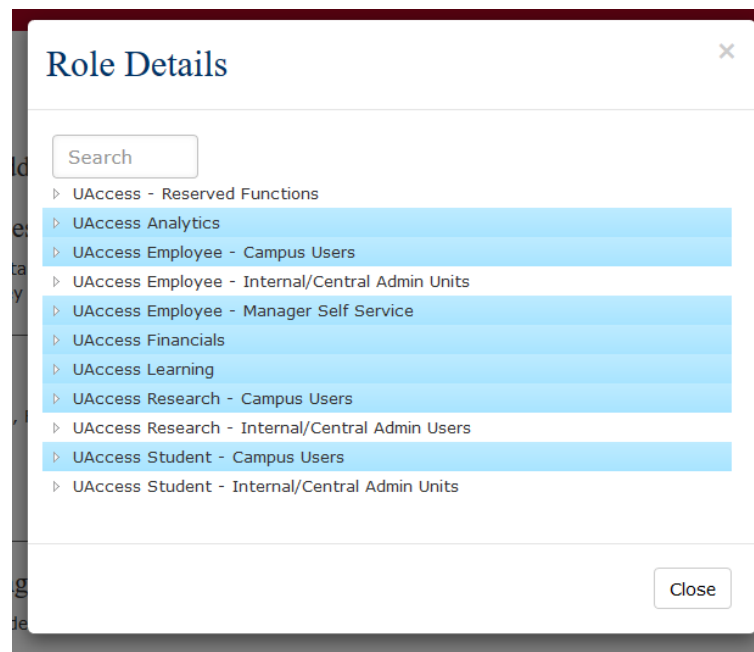
- ✓ Continue to **Add Roles** if you need additional roles for this employee. Follow all steps above marked by '*' until all roles have been added.
For example, if the employee also needs access to the Health and Safety Reports and also to view LDETS, you would add System: UAccess Employee- Campus Users, Subject Area: Health and Safety, Role: Health and Safety End User, as well as UAccess Employee-Campus Users, Subject Area: Commitment Accounting, and check Role: LDETs – View. Save.
- ✓ Leave and return later: access later by clicking on **Login Submit Access Request (Add or Remove)** and search by Subject User in the **New Request** box, OR click on **My Requests** in upper right corner of Access Provisioning Tool v3 and click on **Edit Request** for the request you wish to return to and complete/review. The **View Details** button allows you to review old requests that have been either submitted or cancelled. You can also **Submit** or **Cancel** from here, if not already done.

- ✓ Review and Edit Request(s):
 - >Click on (*click to toggle details*) to the right of **Request for (Subject User's Name)** to allow editing of APL Approver.
 - >View whether **FERPA and ElevPriv** requirements have been met or whether still needed (**reason shown in red**).
 - >**View Details:** displays additional business justification and row level security requirement for that role.
 - >**Replace Row Level Security:** allows you to make changes to the saved entry for that role.
 - >**Remove:** allows you to remove that role request.
- ✓ **Submit Request or Cancel Request.**

C. ROLES FOR BUSINESS STAFF

➤ **Systems**

Click View button beside **Role Details** to see a list of **UAccess Systems** (UAccess Analytics, UAccess Employee, UAccess Financials, UAccess Learning, UAccess Research, UAccess Student). Roles found in the Systems designated *Internal/Central Admin Units* are specific to central administrative units and those designated *Reserved Functions* are for select audiences such as those using assistive technologies (screen readers) or specialized users in UAccess Student, and are not typical requests for CALS Business. CALS Business roles will be found in the following highlighted **UAccess Systems**:



➤ **UAccess Systems/Subject Areas**

For roles specific to CALS Business Office staff, see the highlighted **UAccess Systems** (the top highlighted item) and the various **Subject Areas/Subject Area Roles** (the highlighted items below the UAccess System) in the screen shots that follow. Please read description of the role to be sure that it is one needed by the employee for which you are requesting access.

1. UAccess Analytics

UAccess - Reserved Functions
UAccess Analytics <i>Analytics/Reporting access that includes dashboards and reports created using data refreshed from UAccess Employee, Financials, Research, Space, Student, and other systems.</i>
Base Access <i>Access to all unrestricted data from UAccess Employee, Student, and Financials systems.</i>
Department Head
ELM - High
ELM - Medium <i>UAccess Learning data including Courses, Classes, and Transcripts.</i>
ELM - Medium <i>Intended for use by Employees/Learners, Department Administrators, Department Managers/Supervisors, and Business Managers to view UAccess Learning data including Courses, Classes, and Transcripts.</i>
Executive
HR - Benefits
HR - Medium <i>Intended for College/Department staff whose job responsibilities include reporting on employee and human resource information. Does not include access to benefits, deductions, or garnishments information.</i>
Human Resources - Medium <i>Intended for College/Department staff whose job responsibilities include reporting on basic employee and human resource information. Does not include access to benefits, deductions, or garnishments information.</i>
Research <i>Includes information related to the department of Sponsored Projects Services, such as all outgoing proposals/applications and incoming awards received on behalf of the UA. Most grants, contracts, and other agreements received from outside sources are considered "sponsored projects" and can include activity and programs related to research, education and training, public service, etc.</i>
Research - Medium <i>Includes information related to the department of Sponsored Projects Services, such as all outgoing proposals/applications and incoming awards received on behalf of the UA. Most grants, contracts, and other agreements received from outside sources are considered "sponsored</i>

For access to ALVSCE Dashboards: send the employee name, department(s), and categories (Business, Personnel, Academic, and/or Research) for which access is needed to the Planning, Consulting, and Data Solutions Team (DST) via the DST Request Form, <https://compass.arizona.edu/dbs/dst-request>.

2. UAccess Employee - Campus Users

The image displays two screenshots of the UAccess system interface. The left screenshot shows the 'Role Details' page for 'UAccess Employee - Campus Users'. The right screenshot shows the 'UAccess Employee - Campus Users' role details page, highlighting specific roles and their descriptions.

Role Details

Search

- UAccess - Reserved Functions
- UAccess Analytics
- UAccess Employee - Campus Users**
 - Employee system access for college or department users, including roles related to Commitment Accounting, Payroll, Time and Labor, and Workforce Administration.
 - Commitment Accounting**
 - Allows selection of a role that provides view access to historical (pre-UAccess Financials) labor distribution expense transfer requests (LDETs).
 - LDETs - View**
 - Grants view access to historical (pre-UAccess Financials) labor distribution expense transfer requests (LDETs).
 - Health and Safety**
 - Allows selection of roles related to reporting incident and injury reports for Health and Safety.
 - Health and Safety End User**
 - Payroll**
 - Pay Request Creator/Approver**
 - Pay Request Creator/Approver with Cash Allowance**
 - Allows selection of roles related to creating, approving, or viewing pay requests.
 - Pay Request Approver - President's Office**
 - Pay Request View User**
 - Pay Requests Approver - MDTC Deans**
 - Pay Requests Approver - MDTC Dept Heads**
 - Pay Requests Approver - Provost's Office**
 - Pay Requests Approver - University Physicians**
 - Pay Requests Creator - University Physicians**
 - Pay Requests Creator/Approver - Athletics**
 - Pay Requests Creator/Approver - Auto**

UAccess Employee - Campus Users

Grants access to create and approve Payment Requests for auto allowances. This role is limited to a small number of staff with an established business need for this access. If your department does not already process these types of Payment Requests, please contact Payroll to discuss your needs before requesting this access here.

- Pay Requests Creator/Approver - Child Care
- Pay Requests Creator/Approver - Housing**
 - Grants access to create and approve Payment Requests for housing allowances. This role is limited to a small number of staff with an established business need for this access. If your department does not already process Payment Requests for housing, please contact Payroll to discuss your needs before requesting this access here.
- Pay Requests Creator/Approver - Market Sales
- Pay Requests Creator/Approver - UAPD Uniforms**
- Time and Labor**
 - Allows selection of roles related to approving, coordinating, or viewing time sheets.
- Time Approve Interface**
 - FLSA Training Required - Provide the date training was completed, in the additional information space above. Grants users access to run interface programs to upload time reported in other systems into PeopleSoft.
- Time Approver**
 - FLSA Training Required - Provide the date training was completed, in the additional information space above. Grants access to pages to approve employee time for specific departments. Per FSO Payroll Policy 19.01 regarding segregation of duties, the Time Approver and Time Coordinator must not be the same person.
- Time Coordinator**
 - FLSA Training Required - Provide the date training was completed, in the additional information space above. Grants access to manage exceptions and view timesheets of any status for a specific department(s). This role does not provide the ability to approve timesheets. Per FSO Payroll Policy 19.01 regarding segregation of duties, the Time Approver and Time Coordinator must not be the same person.
- Workforce Administration**
 - Allows selection of a role that provides view access to the Position Job-Cross Reference page.
- Position Cross-Reference View**

Per FSO policy on Separation of Duties, user cannot have both Time Approver and Time Coordinator roles. CALS recommends only Time Approver since it allows the business staff to do both roles.

3. UAccess Employee - Manager Self Service

Role Details

Search

- UAccess - Reserved Functions
- UAccess Analytics
- UAccess Employee - Campus Users
- UAccess Employee - Internal/Central Admin Units
- UAccess Employee - Manager Self Service**
Employee system access for creating and approving Manager Self-Service Online Forms.
 - College Reviewer
 - College/Division Approver
 - Create Specific Requests**
Allows selection of roles that provide access to create specific Manager Self-Service requests.
 - Campus Colleague**
Grants access to create Designated Campus Colleague (DCC) requests.
 - Department Funding Approver**
Grants users permission to approve for Department Funding step within MSS transactions. Setup includes the Workforce Admin Position XRef View Role.
 - Position Distribution**
Grants access to approve position distribution document requests.
NOTE: Additional setup in UAccess Employee "Manage Approvers" page is required by the College, after access is granted.
 - Executive Approver
 - Export Control Approver
 - Graduate College Approver
 - HR Department Approver**
Grants users permission to approve for HR Department Approver step within MSS transactions. Setup includes the Workforce Admin Position XRef View Role.
 - Campus Colleague**
Grants access to approve Campus Colleague requests.

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- Contracts**
Grants access to review/approve Notice of Appointment/Notice of Reappointment to employees.
- Graduate NOA Contracts**
Grants access to generate Notice of Appointment for Graduate employees, and approve Grad NOA transactions.
- I9 Approver**
Grants access to approve I-9 forms.
- I9 Reviewer**
Grants access to review I-9 forms.
- Job Data Changes**
Grants access to approve Job Data Change requests.
- Personal Information**
Grants access to approve Personal Information change requests.
- Position Distribution**
Grants access to approve position distribution document requests.
- Position Management**
Grants access to approve position create and position modify document requests.
- Recruitment Proposal**
Grants access to approve workflow transactions for recruitment proposals or offers routed to a department.
- Terminate Employment**
Grants access to approve ALL Termination and Retirement document requests.
- Title Management**
Grants access to approve Title Management requests.
 - International Fac/Scholars
 - Provost
 - Super College Approver
- UAccess Financials
- UAccess Learning
- UAccess Research - Campus Users
- UAccess Research - Internal/Central Admin Users
- UAccess Student - Campus Users
- UAccess Student - Internal/Central Admin Units

4. UAccess Financials

- ▷ UAccess - Reserved Functions
- ▷ UAccess Analytics
- ▷ UAccess Employee - Campus Users
- ▷ UAccess Employee - Internal/Central Admin Units
- ▷ UAccess Employee - Manager Self Service
- ◀ UAccess Financials

Request this access when more than Base Access is required or the person requiring Base Access is a Designated Campus Colleague (DCC). In addition to the Base Access, this access includes Workflow Management (Creating Groups and Organization Review) and Chart of Accounts e-Docs (account, sub-account, sub-object code, project code). Active Faculty and Staff will automatically get Base Financial System Access and do not need to request access.

 - ◀ Affiliates/DCCs

Financial System Base Access includes all general purchasing e-Docs (Requisitions and Arizona Buyways); general financial processing e-Docs (Disbursement Voucher, Internal Billing, General Error Correction, Distribution of Income and Expense, Pre-Encumbrance and Cash Receipt); PCard Reconciliation and Balance Inquires. Request this access for DCCs that need basic financial system access. Active Faculty and Staff do not need to request this access; it is automatically granted.

 - ▷ Base Financial System Access - Affiliates and DCCs (role 11173)
 - ▷ UA Affiliate Account Supervisor (role 10421)
 - ◀ Business and Administrative User Access

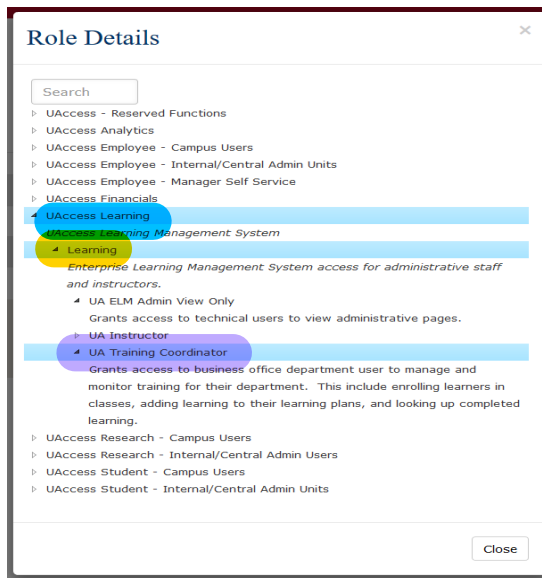
Request this access when more than Base Access is required. In addition to the Base Access, this access includes Workflow Management (Creating Groups and Organization Review) and Chart of Accounts e-Docs (account, sub-account, sub-object code, project code). This role is also eligible to serve as Fiscal Officer or Delegate. To become a Fiscal Officer or Delegate, you must update the Accounts or Account Delegates in UAccess Financials.

 - ◀ Business and Administrative User Access (role 54)

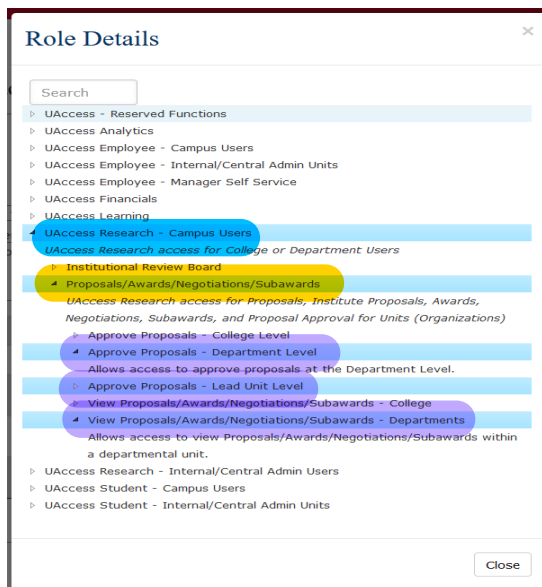
Grants user access to be eligible to serve as Fiscal Officers and Delegates; Chart of Accounts and Workflow.
- ▷ UAccess Learning
- ▷ UAccess Research - Campus Users
- ▷ UAccess Research - Internal/Central Admin Users
- ▷ UAccess Student - Campus Users
- ▷ UAccess Student - Internal/Central Admin Units

CALS Business Services manages the assignment of secondary delegates. This is handled automatically to insure that all your new accounts have secondary delegates assigned. Once you have confirmation of Role 54 being approved, email Kevin Teres kteres@email.arizona.edu requesting to add an employee as Secondary Delegate. Provide the unit Organization Code(s) and the name and NetID of the person to be added.

5. UAccess Learning



6. UAccess Research-Campus Users



7. UAccess Student

This system is used by CALS Academic Units; county extension offices and agriculture experiment station units typically do not utilize UAccess Student, so usually no access is required.