

Important Note: The Express Billing Requestor Role must be requested by your Reports To Manager

1. Log into PeopleSoft and navigate to My work > Manage PeopleSoft Access

Dashboa	IVERSITY OF ALGARY rd All about me My	work Around campus		Turner, Chris Hor Search	me Sign out
Access & delegation HR delegation Finance/project delegation Expense entry delegation SecurID request View my PeopleSoft access	People management Manager self service Manage PeopleSoft access Job opening request Template-based hire Manage applicants My team learning Job Profile Database Onboarding checklists Human Resources site AUPE local 52 site MaPS executive site TUCFA site	Finance & Supply Chain Payment Selector Tool Create a Payment Request Create expense report Manage expenses Create requisition Manage requisitions Pending approvals Apply for Credit Card Reconcile Credit Card PER Statement Preferred suppliers Shipping & receiving SCM service request forms	Travel Policy & procedures Travel & expense card Book travel Mobile phone roaming Vehicle Rentals	Reporting BI & Analytics HR manager reports	Direct access D2L (Desire2Leam,Brightspace) eFin PS Student Administration PS Human Resources PS Enterprise Learning PS Finance & Supply Chain Academic Advisement

2. Select PeopleSoft Access Request and hit the select button for the employee needing access from the list of employees appearing

			PeopleSoft Access Requests			â	Q	:	۲
PeopleSoft Access Request	P	eopleSoft Access Rec	uest						
Remove PeopleSoft Access	E	mployee Selection Criteria							
Locess Request Approval	s	Select the employee you'll be w	orking with. You can initiate transactions only for employees w	no reported to	you as of	f the date you ente	ered on th	is page	э.
C Access Request Inquiry		As	Cof Date 2021/10/07	n Employees					
Current PeopleSoft Access		Chris O Turner's employe	es						
		E)							
		Select	Name	Empl ID	Job	Empl Status	HR Sta	tus	Pos
	11	Select	Kristi Horne	10136422	0	Active	Active		000
		Select	Melinda Bollman	04284995	0	Active	Active		000
		Select	Sandra Jones	04247927	0	Active	Active		000

3. Select 'by category' under the Choose a Roleset Method Selection Method and click Continue

		PeopleSoft A	ccess R	equests				â	Q	:	٢
PeopleSoft Access Request	PeopleSoft Access Requ	lest					Request ID NEXT	New-	Window	Help	
Remove PeopleSoft Access	Review the selected individual's job would like to use to select the roles	o information and cu et(s) for that individ	urrent Peopl lual, then cli	eSoft access p ck the <b>Contin</b>	orofile. Cl <b>Je</b> buttor	hoose a meth ı.	od that you				
Access Request Approval	Saved and pending requests for the can edit, submit or delete a saved r	e selected individua equest. You can ca	I are listed	under the Save ling request th	ed/Pendi at is sub	ng Requests mitted by you	section. You through the				
🟹 Access Request Inquiry	Access Request Approval page.										
Current PeopleSoft Access	Name: Horne,Kristi										
	Expand the list if more than 5 role Current PeopleSoft Access Profile	esets have been p Person	rovisioned alize   Fin	d   View All		First 🕚	1-5 of 19 🕑 Last				
	Info Additional Details										
	Role Set	Description	SecurID Required	Request ID	Status	Begin Date	End Date				
	AP_INQUIRY	AP Inquiry	N	0000031051	Active	2019/03/25					- 1
	AP_NEPF_CLERK	AP NEPF Clerk	N	0000031051	Active	2019/03/25					
	AP_PRF_VIEW_ONLY	AP PRF View Only	N	0000031051	Active	2019/03/25					
	AP_SCANNING_ADMINISTRATO	R AP Scanning Administrator	N	0000031051	Active	2019/03/25					
	AP_SCANNING_INQUIRY	AP Scanning Inquiry	N	0000031051	Active	2019/03/25					
	Choose a Roleset Selection	on Method by cate	egory				Continue				~

## 4. Click on the FSCM Restricted tab and expand Accounts Receivable Function-based Rolesets section

VP Finance and Supply	Chain				
This section is for reques associates reporting to the Financial Reporting, Resea are not an employee or a general Departments) tab.	ting access to Peoples are Finance Department rch Accounting, Finance associate in one of these are	Soft Finance and Sup s Only. This includes Services, Supply Cha as please go to FSCM Ger	pply Chain modules for Integrated Service Cente ain Management, Treasur heral (Finance Supply Chain M	employees and ger r, Financial Operatio y and Investments. I anagement for Faculties	neral Ins, f you and
Accounts Payable	e Function-based	Rolesets			
nstruction: If you are provis or your initial position-based	ioning based on job, use d request was partially de	e the Position-based re enied, you can select	blesets; if you are provision the rolesets based on Fur	oning additional acce nction.	ess
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Accounts Payable	e Position-based	Rolesets			
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nstruction: If you are provis or your initial position-based	ioning based on job, use d request was partially de	e the Position-based re enied, you can select	blesets; if you are provision the rolesets based on Fur	oning additional acce action.	ess
Accounts Receiva	able Position-bas	ed Roleset			
nstruction: If you are provis	ioning based on job, use	e the Position-based re	plesets; if you are provision	oning additional acce	ess

5. Select the Express Billing Requestor roleset



6. After selecting the Express Billing Requestor role scroll down to the bottom, verify the Express Billing Requestor role is requested and then select CONTINUE

7. Scroll to the bottom of the next screen and select submit

ID	Last Na	ame Fi	rst Name	Org	Empl	Additional In	fo	
				Employee	0	Additional Jol	and Security Pro	file Info
equest *Begi	Effective D	0ates 021/11105		End Date:		ii)		
equeste	d Access							
Role	e Set				De	scription	Step-up Flag	
1 AR_	EXPRESS_E	BILLING_RE	QUESTOR	2	Ex Re	press Billing questor	Y	-
Iditional I	Details Neede	ed						
dditional I Commer Reques Comme	Details Neede nts stor ents:	ed						
dditional I Commer Reques Comme	Details Neede nts etor ents:	ed				Save	e for Later	Submit

8. You will get another screen asking you to confirm once you confirm then the workflow starts for this role

9. Access will be granted once it has been approved. You will be notified by automatic email