

Kuali@USC

Completing the Kuali User Access Request

Catherine Maddaford
Director of Training,
Kuali Access Manager
Office of the Comptroller



USC University of
Southern California

Kuali@USC

GATHERING THE INFORMATION



USC University of
Southern California

- If you have questions about how roles work and what type of access you need, please consult with your supervisor or your business office for your school or department.
- There is also a presentation on understanding access in Kuali if you are the person responsible for assisting with access in your division.
- If you know what you need, proceed to the next step, which is completing the access request.



You will need to know the following:

- Organization code – 10 digit code used to indicate where the applicant works and who the SBO is (see next slide for help with this.)
- Type of access you are requesting, such as the business process name or module in KFS.
- When the preparer is not the applicant, you will need to know the name and ID number or other specific identifier.

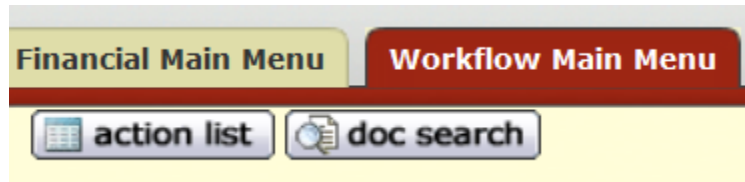


- *Administration tab>Security>Person*
 - Look up your own person record and you will see at the top the primary department code, which is the same as home department and region code in Workday.
- *Financial Main Menu>Lookup and Maintenance>*
 - Use the Home Department lookup and enter your primary department code you found.
 - In your search results you will see the default payroll clearing account, which you can drill through to find the organization code associated with that account.
 - You can use that org code in your request, or you can enter any other 10-digit org code that you might be using in your access request that represents your division or school.




Kuali@USC




COMPLETING THE REQUEST EDOC



User Access Request Document

- [User Access Request Document](#) 

 = User guide

Applicant Information	
Same as preparer:	<input type="checkbox"/>
* USC ID Number (10 digits):	<input type="text"/> 
* First Name:	<input type="text"/> 
* Department Organization Code (10 digits):	<input type="text"/>
Email Address:	<input type="text"/> 

Open a request edoc and enter the applicant information.



- Select “same as preparer” if you are preparing the request for yourself.
- If you are preparing the request for someone else, enter one of the other fields.
- If the employee’s identity is active in Kuali then the rest of the information will be pulled in from their person record.
- Enter the 10-digit org code you found and click on continue to proceed to the rest of the request.



- Click on the box(es) next to the business process module that will be included in this request.
- Select only those that apply to this request.
- Select “other requests” for something not listed.

Kuali Financial System (KFS)		
Cashiering:	<input type="checkbox"/>	eStatement:
Procurement Card Reallocation:	<input type="checkbox"/>	Journal Vouchers (JVs):
Purchasing - Accounts Payable (USC eMarket):	<input type="checkbox"/>	Disbursement Vouchers:
Payroll Expense Transfer & Effort Certification:	<input type="checkbox"/>	Internal Billing:
		Pre-Encumbrance:
		General Budget Change:
		Capital Assets Management:
		SPA Budget Reallocation:
Kuali Enterprise Workflow (KEW)		
General Purpose Workflow:	<input type="checkbox"/>	Chart of Accounts (COA):
Financial Aid Accounts:	<input type="checkbox"/>	Course Scheduling:
Account Level or Organization Code Level Access, and Payroll BI Access (Inquiries, Payroll Expense Transfer, and Reports)		
Add Account Access:	<input type="checkbox"/>	Remove Account Access:
Add Organization Code Access:	<input type="checkbox"/>	Remove Organization Code Access:
		Payroll Business Intelligence Reporting Access:
Other Requests		
Other Requests:	<input type="checkbox"/>	

- For each module that you selected the tab in the edoc will open with the related information and details required.
- Each type of access that applies to that module will be included in the tab.
- Each option is provided in a check box, radio button, pull-down list, or text box.
- If you do not check the box for the module then the applicable tab will not be visible to the approvers, even if you complete information in the tab.



- Select add or remove accounts or payroll reporting.
- Add individual accounts or masks or import or attach list of accounts.
- Select Inquiries and Reports, if applicable.

Account Level or Organization Code Level Access, and Payroll BI Access (Inquiries, Payroll Expense Transfer, and Reports)		
Add Account Access:	<input checked="" type="checkbox"/>	Remove Account Access: <input type="checkbox"/>
Add Organization Code Access:	<input type="checkbox"/>	Remove Organization Code Access: <input type="checkbox"/>
		Payroll Business Intelligence Reporting Access: <input type="checkbox"/>

Enter individual 10-digit account numbers, and/or *, and/or 4- or 6-digit masks:		
	Account Number*	
add:	<input type="text"/>	<input type="text"/>
Enter accounts to be excluded from organization codes or account masks (individual 10-digit account numbers, and/or 6-digit masks):		
	Account Number*	
add:	<input type="text"/>	<input type="text"/>
Inquiries and Reports:		
Choose Add Access:	<input type="radio"/> Inquiries Access only <input type="radio"/> Both Inquiries and Cognos Reports Access <input checked="" type="radio"/> None	

Kuali@USC

Example – add orgs

- Select add or remove org code security.
- Add individual org codes or rollup org codes.
- If applicable, add inquiries and reports, and list accounts from the org that should be denied/excluded.

Account Level or Organization Code Level Access, and Payroll BI Access (Inquiries, Payroll Expense Transfer, and Reports)			
Add Account Access:	<input type="checkbox"/>	Remove Account Access:	<input type="checkbox"/>
Add Organization Code Access:	<input checked="" type="checkbox"/>	Remove Organization Code Access:	<input type="checkbox"/>

Enter individual 10-digit organization code, and/or 3-digit, 5-digit, or 7-digit masks:		
	Organization Code*	
add:	<input type="text"/>	<input type="text"/>
Enter accounts to be excluded from organization codes (individual 10-digit account numbers, and/or 6-digit masks. Ex: 276354*):		
	Account Number*	
add:	<input type="text"/>	<input type="text"/>
Inquiries and Reports:		
Choose Add Access:	<input type="radio"/> Inquiries Access only <input type="radio"/> Both Inquiries and Cognos Reports Access <input checked="" type="radio"/> None	

Kuali@USC

Example – add role

- Select the module
- Select the role
- Provide the security qualifier (org code) for the role.

Kuali Financial System (KFS)	
Cashiering:	<input type="checkbox"/>
Procurement Card Reallocation:	<input checked="" type="checkbox"/>
Purchasing - Accounts Payable (USC eMarket):	<input type="checkbox"/>
Payroll Expense Transfer & Effort Certification:	<input type="checkbox"/>

Procurement Card Reallocation hide

Add Access: Enter individual 10-digit organization codes, and/or 5- or 7-digit masks:

	Access Type*	Organization Code*
add:	Select	
	Select	
Delete Access: Enter	Reallocator Approver (Role # 131106)	Organization Code
	Reallocator Reviewer (Role # 131105)	Organization Code
	Approver and Reviewer (Role #'s 131106 & 131105)	Organization Code
add:		

Explanation of User Access Request

- Applicant is the employee whose supervisor is being changed, not the supervisor.
- Select eStatement and/or Disbursement Vouchers for the applicable supervisor to be changed.
- Supply both the current (see Kuali supervisor lookup) and new supervisor information.

eStatement:	<input checked="" type="checkbox"/>
Journal Vouchers (JVs):	<input type="checkbox"/>
Disbursement Vouchers:	<input checked="" type="checkbox"/>
Internal Billing:	<input type="checkbox"/>

eStatement	
Change Supervisor:	
Current Supervisor First Name:	<input type="text"/>
Current Supervisor USC ID Number (10 digits):	<input type="text"/>
New Supervisor First Name:	<input type="text"/>
New Supervisor USC ID Number (10 digits):	<input type="text"/>



- Assigned roles will be automatically removed from the person record when the person record is inactivated and the person cannot log in to Kuali.
- Some derived roles may still remain active and assign workflow nodes, so it is best to submit a request to ensure those derived roles are deactivated as well to avoid edocs being “stuck” in the action list for an inactive person.



- Employees who have Kuali assigned or derived roles and are transferring to a new department and position will need to submit a request for the following:
 - Remove the security associated with their old position, such as accounts or org codes
 - Remove any assigned roles they no longer need
 - Update their existing roles with the new security, such as accounts and org codes, for their new position, where applicable.
- The request to add access for the new department can also include removal of the old access and be approved by the new SBO, once the transfer is completed, if desired, or the removal and addition can be submitted on separate requests with the approval of the two different SBO's.



Kuali@USC

DO'S AND DON'TS

- DO include an explanation in each tab with more specific instructions to assist approvers and processors in understanding your request.
- DO include the applicant name in the description to assist in searching for a request.
- DO check the person lookup link provided in the access request document to view what the applicant already has.
- DO attach the online training completion certificates when training is required for access.
- DO carefully review information about the role you are applying for before completing the request.



- DON'T request roles or accounts the applicant already has access to.
- DON'T select the applicant simply by name without checking the ID numbers to verify his/her identity.
- DON'T request removal of any roles or security without carefully verifying against the roles currently assigned to the applicant.
- DON'T submit a request for roles that require training before the training has been completed.
- DON'T submit a request without SBO approval.

