PeopleSoft HR Security Access Coordinator Training

Managing Human Resources Information System Accesses Revision 1.0 3-March-2022

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1. What is PeopleSoft?

- An enterprise-level software solution for many different needs in businesses, organizations, and universities.
- BYU currently has three major instances of (non-integrated) PeopleSoft running on campus:
 - Human Resources
 - Finances
 - Student Financials / Campus Solutions
- PeopleSoft is BYU's Human Resource Information System (HRIS).



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PeopleSoft HR Overview

- PeopleSoft HR has been used at BYU over 20 years.
- BYU did a visual interface upgrade to the *Fluid Interface* in 2018. You will find various pages within PeopleSoft utilizing both the new old interfaces. Some old terms also are used in different places.
- Both old & new terms are used interchangeably
 - **eFORMS**: the new term and interface currently used
 - **ePAF:** the old forms previously used (electronic personnel action forms)
 - Both terms are found frequently when managing HR security access
 - HR Security training & provisioning (ie names of roles) may use the old term
 - These are different, and your users should only use the newer eFORMs for HR actions (hiring, terminations, etc).

Section 2: Role of PeopleSoft HR Security Access Coordinators

- Grant employees in your department different types of accesses to the PeopleSoft HRIS system
 - Done by granting **ROLES** and specifying **DEPARTMENT NODES**
- You are the <u>gatekeeper</u> of access to personnel data, employee actions, and time management for your department
- As gatekeeper, you are responsible to ensure that people only have the access needed to do their job.





Access Considerations and Best Practices

- Request the minimum level of access needed to perform job duties
- Limit access to full-time employee's compensation
 - employees with a need-to-know
 - full-time employees only if possible
- When possible, limit student employee access to compensation
- eForm submissions should be reviewed by a second individual
 - Limit those who have both the "User" and "Approver" roles
- Ensure all approval roles are assigned
- Enter training dates before submitting access request.
- When making changes to an employee's access include comments with the intended changes
- Be cautious when using the copy access function
- Remove access before an employee terminates or transfers
- Audit access regularly

Summary of Types of HR System Access

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More detail on each of these below

- Report Access
 - All employee
 - Part-time employee
 - With or without compensation
- Hiring (Job Posting) Access
 - Job Posting
 - eForms
- Y Time (Time Management) Access
 - Time Manager
 - Time Viewer

Auditing Access



Auditing Access

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• Filter

- Employee
- Role
- No Filter (all employees and roles)
- Department
 - All departments
 - Select departments (one or more)

	Security Request Home	Generate Security Report
G	Generate Security Report	
es –	Select report filter options	
	PeopleSoft App Human Resources v	
	○ Filter by Emplid ○ Filter by Role Name	
	○ All Departments	
	Select Departments to View	
	Department Descr	Browse Department Tree
	1	
	Concerts Report	

Auditing Access

- Review Roles
- Review Department Access
- Review Time & Labor
- Look for terminated employees
- Look for employee with access outside of your department

PeopleSo	ft Secu	rity for De	partm	ental Employee	es		
Name	Netid	Emplid	Арр	Authorized Roles	Departments	Time & Labor	ePAF
Example Name 1		1	HR	 Faculty Job Posting Full-time ePAF User Part-time ePAF User Reports Part-time Employees no Comp Student Job Posting Time Manager 	- 200 Information Softens Department	- Contract of the second secon	
Example Name 2		1	HR	- Time Manager		- Department - INA	
Example Name 3		1	HR	- Part-time ePAF User - Student Job Posting	- MOIN Productings		- DER Ruthinge

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Security Access Request Portal

Create a new HR access request or view previous requests

Section 3: Useful Links for Security Access Coordinators



Security Access Coordinators on Campus

List of access coordinators in departments across campus



PeopleSoft HR Navigation

Great introduction video to navigating in PeopleSoft and the newer (2018) Fluid Interface. ≈7 minutes

Trainings for Individuals Receiving Access

- <u>PeopleSoft HR Navigation</u> is useful for anyone new to navigating within PeopleSoft. ≈7 minutes
- The Security Access Request form has fields for three different training dates:
 - 1. Recommended: <u>Y-Time Manager</u> (≈26 min.). *Y-Time Manager Training – Online*
 - 2. Recommended: <u>Job Portal Training</u> (≈30 min.). Student Employment Job Portal Training
 - **3.** <u>Required</u>: <u>ePAF/eForm training</u> (≈35 min.). *eForm Training*



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Trainings for Individuals Receiving Access

- <u>PeopleSoft HR Navigation</u> is useful for anyone new to navigating within PeopleSoft. ≈7 minutes
- The Security Access Request form has fields for three different training dates:
 - 1. Recommended: <u>Y-Time Manager</u> (≈26 min.). Title: *Y-Time Manager Training – Online*
 - 1. Recommended: <u>Job Portal Training</u> (≈30 min.) Title: *Student Employment Job Portal Training*
 - **3.** <u>Required</u>: <u>ePAF/eForm training (</u>≈35 min.). Title: *ePAF Training*



Please enter the dates the individual completed their training into these boxes **BEFORE** submitting the request

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If an access request includes an ePAF/eForm role, and the training completion date is not entered, the request will be denied and returned.

PeoplSoft HR: Security Request Home

Link: https://hrms.byu.edu/



Searching and Adding Links

 You may need to Search for "Security Access Request"



 Then add that to your homepage or favorites

BYU Human R	esources/Payroll
< Security	Search Results
▶ New Search	View Search Results 1 results for keyword: "Security Access Request"
← Category PS HRMS - Local Node Navig	ator (1) Security Request Home Security Access Request Homepage Application: PS HRMS - Local Node

Searching and Adding Links

- You may need to
 Search for
 "Security
 Access
 Request"
- Then add ______
 that to your homepage or favorites



Security Access Request Home Page



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Security Request Home

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Security Access Requests

Section 4: Security Access Request Form

Typical Security Access Request page \rightarrow

Depending on your department, you may see fewer or greater numbers of roles available to grant

lividual Information		
Find Individual By	Not ID	
O Emplid Net ID	Net ID	
Copy Security from Another User	YTime Training: Job Posting Training:	
	ePAF Training:	31

Create a Human Resource Security Access Request

Rol	e Selection				
	Role Type	Role Name	Authorized?	Action	
1	Campus Department	Reports All Employees no Comp			-
2	Campus Department	Reports All Employees w/Comp			
3	Campus Department	Reports Part-time Employees no Comp			
4	Campus Department	Reports Part-time Employees w/Comp			
5	Campus Job Posting	College/Div Staff Posting Approvr			
6	Campus Job Posting	College/Division Fac Posting Apprvr			
7	Campus Job Posting	Dept Faculty Job Posting Approver			
8	Campus Job Posting	Faculty Job Posting			
9	Campus Job Posting	Staff/Admin Job Posting			
10	Campus Job Posting	Student Job Posting			
11	Campus ePAF	College/Division Approver			
12	Campus ePAF	FT Supplemental Comp			
13	Campus ePAF	Full-time ePAF Approver			
14	Campus ePAF	Full-time ePAF User			
15	Campus ePAF	Part-time ePAF Approver			-

Comments

Submit for Approval

Enter EmplID or Net ID

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 Choose which ID type you will enter for the employee you are requesting an access change for

2) Enter their ID, and press tab/enter

This will populate the form with their currently assigned roles

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Individual Information						
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O Emplid 💿 Net ID						
Copy Security from Another User	YTime Training:					
Role Selection						
Role Type	Role Name	Authorized?	Action			
1 Campus Department	Reports All Employees no Comp			*		
2 Campus Department	Reports All Employees w/Comp					
3 Campus Department	Reports Part-time Employees no Comp					
4 Campus Department	Reports Part-time Employees w/Comp					

Copying Access

If you have a current or departing employee with specific accesses you would like to copy directly to a new employee, the easiest way it to select the "Copy" box

Then enter the NetID of the user you want to copy

- This populates the entire Security Access Request Form down below
- This needs to be done before a departing employee ends their employment

Individual Information Find Individual By Q Net ID O Emplid Net ID YTime Training: Copy Security from Another User Job Posting Training: ePAF Training: Copy User Net ID:

Create a Human Resource Security Access Request

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CAUTION!

Carefully review all access that is granted when copying access. Ensure the level of access granted the new employee is appropriate for their job.

Roles

- The top part of the Security Access Request form is where you select the needed Roles.
- Selecting roles grants the individual specific accesses within PeopleSoft
- Find detail on these common roles below
- There are different Role Types
- Additional selection boxes will pop up on the form with certain Role Type selections
 - Campus ePAF roles → opens a Department Selection and an Override selection box
 - Ytime Access roles → opens a Time and Labor department selection box

Rol	e Selection			
	Role Type	Role Name	Authorized?	Action
1	Campus Department	Reports All Employees no Comp		
2	Campus Department	Reports All Employees w/Comp		
3	Campus Department	Reports Part-time Employees no Comp		
4	Campus Department	Reports Part-time Employees w/Comp		
5	Campus Job Posting	College/Div Staff Posting Approvr		
6	Campus Job Posting	College/Division Fac Posting Apprvr		
7	Campus Job Posting	Dept Faculty Job Posting Approver		
8	Campus Job Posting	Faculty Job Posting		
9	Campus Job Posting	Staff/Admin Job Posting		
10	Campus Job Posting	Student Job Posting		
11	Campus ePAF	College/Division Approver		
12	Campus ePAF	FT Supplemental Comp		
13	Campus ePAF	Full-time ePAF Approver		
14	Campus ePAF	Full-time ePAF User		
15	Campus ePAF	Part-time ePAF Approver		
16	Campus ePAF	Part-time ePAF User		
17	Faculty ePAF	College Faculty ePAF Approver		
18	Faculty ePAF	Department Chair ePAF Approver		
19	Faculty ePAF	Faculty Contract ePAF User		
20	YTime Access	Time Manager		
21	YTime Access	Time Viewer		
22	YTime Access	Y Time Reports - Controller		

Department Selection Boxes

If selecting a Campus ePAF Role

- Department Selection:
 - Specify what organizational nodes the individual should have access to. This is a 4 digit code
- ePAF Override Selection:
 - List here specific nodes this individual will only have access to execute ePAFs for, if wanting to limit more narrowly than the above Department Selection.

If selecting a Ytime Access Role

- Time & Labor Selection
 - If the TIME MANGER or TIME VIEWER role is selected, an additional box appears where you can specify what organizational *nodes* the individual should have access to.



In the "Comments" box, please briefly explain the reason or intended outcome of the access request

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Role Selection					
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22 YTime Access	Time Manager			~	Unchanged

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Department Selection: granularity

- Department Selection:
 - Specify the top node for which access is needed. Rights <u>CASCADE DOWN</u> to all subunits for reporting and eForm roles.

ePAF Override Selection

- If, for example, an individual needs a broader HR reporting role, but they should be limited to eFORM action to their specific department, you would list the department here. This is <u>rarely</u> used.
- Time & Labor Selection:
 - Each node must be **INDIVIDUALLY** entered
 - Time & Labor access is granular by department, and does not cascade down from a higher node.



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Inactive Time & Labor Nodes

- You may see INACTIVE Time & Labor nodes
- These start with INA_
- These being listed is not a problem
- These inactive nodes will eventually automatically drop off the system
- Indicates a recently terminated employees (the past 3 months). Allows to view reports & time records of terminated employees

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Organization HR Departments (Nodes)

- Search for Organization Departments. This pulls up the "Security Access Tree"
 - Clicking the links expands the view
 - You must manually type in the unit number(s) back under Department Selection
- All departments (budgetary units) on campus have a unique 4digit code on the HR Tree

Department Selection		
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Time & Labor Selection	Security Access Tree	×
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Section 5: Types of Access You Can Grant

Report Access

• Run various HR reports: for all employees, or limited to part-time employees

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• With or without compensation

Hiring & eForm Access

- Job Posting
- eForms

Ytime Access

- Time Manager
- Time Viewer

Role Explanations

- You grant various accesses to a person in your department by assigning the appropriate <u>role</u>
 - Common roles include giving someone the ability to:
 - Run HR reports
 - Post jobs (hiring) roles
 - Initiate and/or approve eForms for actions such as hiring, changing supervisors, adjusting salary, or terminating employees.
 - Faculty specific roles, such as the ability to initiate contracts
 - Time management roles

Reporting Roles

(see the second training presentation for more detail on available reports)

Role Name \rightarrow Reports all employees **Reports Part-Time Reports All Reports Part-time** Employees w/ Comp Employees w/Comp Employees no comp no Comp (previously BYU CD (previously BYU CD Expert) (previously BYU CD (previously BYU CD Manager) Specialist) Supervisor) **Employees That Are Visible** All Employees (full time, ³/₄ time, Х Х faculty, students) Student Employees Only Х Х (Views department student and parttime (1/2 & 3/4) non student employees) **Compensation Visible Compensation Rates Visible** Х Х **Compensation Not Visible** Х Х Reports Views all department employees Х Х Sick and vacation - update Х Х **Employee List** Х Х Х Х Payroll reports Х Х Part-time Non-student over 500 Х Х Х Х hours report Affordable Care Act (ACA) Reports Х Х Х Х

Common Hiring (Job Posting) Roles

Public platform at <u>yjobs.byu.edu</u>

Different backend management links for Student, Staff/Admin, DCE, and Faculty postings

Role Name →	Student Job Posting	Staff / Admin Job Posting	College/ Division Staff Posting Approver	Faculty Job Posting	Dept Faculty Job Posting Approver	College / Division Fac Posting Approver
Summary:	Access to post student jobs	Access to post staff and administrative jobs	College or Division Approver for staff and admin job postings. This role is needed to approve all job postings for non- student & non- faculty jobs	Access to post Faculty jobs	Approves YJob postings for faculty positions that are then routed to the Dean or top-level approver.	Top level college approver for Faculty job postings. This needs to be assigned to the Dean or someone within the college to approve faculty job postings.
Notes:						Faculty postings require 3 levels of approval. Posting level, Department level, and College level.

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Individuals receiving job posting access are encouraged to take the appropriate online training module.

3 Types of eForm Access

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• Part-Time eForm Roles (including for Student Employees)

- Need 2 role levels assigned
- User / Initiator → Approver
- Full-Time eForm Roles
 - Need 3 role levels assigned
 - User / Initiator \rightarrow Department Approver \rightarrow College/ Division Approver
- Faculty eForm Roles
 - Need 3 role levels assigned
 - User / Initiator \rightarrow Department Chair \rightarrow College Approver

Y-Flow Workflows within PeopleSoft

- PeopleSoft manages process workflows, such as starting with a submitter (user) of an action, then the eFORM or job posting goes to a second (or third) approver of that action.
- Departments & Colleges need to ensure someone is authorized at ALL approval steps (example, someone must be assigned as the College/Division Approver, usually a Department Chair or their designee). Examples below:



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Y-Flow Portal

Part-Time eForm Roles

Part-Time ePAF User Part-Time ePAF Role Name \rightarrow Approver Create or initiate Approve employment action Summary: changes for part-time employment action changes for part-time employees employees Submit: Approve: Actions: Hires and Terminations Account Code Changes Wage Changes Transfers or Supervisor Changes Class of Employees Student Employees Non-Student part-time employees (1/2 time, ³/₄ time contract)

Full-Time eForm Roles

Role Name →	Full-Time ePAF User	Full-time ePAF Approver	College/ Division Approver		FT Supplemental Comp (needed if only doing supp comp)
Summary:	Create or initiate employment action changes for full-time employees	Approve employment action changes for full- time employees, which forwards request	Top level approver of full time eForm requests	٦	Create Supplemental Compensation requests for full-time employees only, not full eForm access.
Actions:	Hi Ac Wage Change Transfe	res and Terminatio count Code Chang s, Supplemental C ers or Supervisor C	ons ges omp Requests Thanges		Initiates request for supplemental compensation for staff and administrative employees.
Class of Employees	Full-time Staff and Administrative employees, and ¾ time employees	Full-time Staff and Administrative employees, and ¾ time employees			

Common Faculty eForm Roles

Role Name →	Faculty Contract ePAF User	Department Chair ePAF Approver	College Faculty ePAF Approver				
Summary:	Create Contract ePAFs/eFORMs for Adjunct Faculty and Supplemental Letters of Appointment	Approves Contract ePAFs/eFORMS for Adjunct Faculty and Supplemental Letters of Appointment	Approves adjunct faculty contracts and supplemental letters of appointment.				
Action:	Create or initiate, modify or end a contract for adjunct faculty. Create supplemental letters of appointment for full time faculty	Review and provide the intermediate (departmental) level approval	Final approval				
Class of Employees	Full time faculty and Adjunct faculty						

Having eFORM User & Approver Roles

- Q: Who typically has these roles?
- A: An administrator, office manager, controller, or HR manager within a department or division.
- Q: Can a student employee have an eForm user role?
- A: Some departments have administrative or HR student employees who as users "initiate" or submit eForm actions.
- Q: Can one person have both the User & Approver Role?
- A: Yes one person can have both. The need for this depends on the structure of the department. Not preferred in most cases.

ePAF/ eFORM Links for HR Users and Approvers



eFORM Links

• ePAF / eFORM

• Worklist (items pending for your review)



Click on icon above for link

Landing Pages for eFORMS & your Worklist

BYU Human Resou	rces/Payroll													
			eForms	-										
ᡖ eForms Landing Page	Hello. Welcome to the e	eForms Landing	Pagel Choose an action.											
🔂 Start a Hire														
Edit Existing Job														
Terminate an Employee	BYU	Human Resc	ources/Payroll											•
Leave of Absence	Marklint							Worklist	Worklist	Worklist	Worklist	Worklist &	Worklist & Q New Window Help	Worklist
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Employment / Recruiting Portals

Roles

BYU

Student Employment Portal Staff / Admin Employment

• Staff / Admin Employment Portal

• Faculty Employment Portal



Click on icon above for link

YJobs Recruitment Site

Public facing recruiting page \rightarrow



YJobs Recruiting Portal (example of Staff Employment page)

https://hrms.byu.edu/psp/ps/EMPLOYEE/HRMS/c/Y_STAFF_RECRUITING.Y_HRS_PORTAL.GBL

- With an assigned YJobs Recruiting Role, hiring managers and approvers have access to YJobs, to post, manage, and approve open positions
- Refer to the Yjobs training for details
- Link to the Student Job Posting training, which is similar to the structure found in Staff/Admin recruitment management: Job Portal Training



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Common Y Time Roles

Role Name →	Time Manager	Time Viewer	Y Time Reports - Controller
Summary:	Y-Time Access for department managers	View-only access to Y-Time	Y-Time report access for Controllers
Actions:	Can both view and correct time clock punches for employees within the nodes they are given access to.	Can view time clock punches for employees within the nodes they are given access to	Can run Y-Time reports for their assigned departments

HR System Security Questions

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