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).
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 gatekeeper 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

• **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

- Filter
  - Employee
  - Role
  - No Filter (all employees and roles)

- Department
  - All departments
  - Select departments (one or more)
Auditing Access

- Review Roles
- Review Department Access
- Review Time & Labor
- Look for terminated employees
- Look for employee with access outside of your department
Section 3: Useful Links for Security Access Coordinators

**Security Access Request Portal**
Create a new HR access request or view previous requests

**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

- **PeopleSoft HR Navigation** 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:** [Y-Time Manager](#) (≈26 min.).
     - Y-Time Manager Training – Online
  2. **Recommended:** [Job Portal Training](#) (≈30 min.).
     - Student Employment Job Portal Training
  3. **Required:** [ePAF/eForm training](#) (≈35 min.).
     - eForm Training
Trainings for Individuals Receiving Access

- **PeopleSoft HR Navigation** 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**: [Y-Time Manager](#) (≈26 min.).
     Title: *Y-Time Manager Training – Online*
  1. **Recommended**: [Job Portal Training](#) (≈30 min.).
     Title: *Student Employment Job Portal Training*
  3. **Required**: ePAF/eForm training (≈35 min.).
     Title: *ePAF Training*

Please enter the dates the individual completed their training into these boxes before submitting the request.

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
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

Start a new Access Request
Section 4: Security Access Request Form

Typical Security Access Request page →

Depending on your department, you may see fewer or greater numbers of roles available to grant.
Enter EmplID or Net ID

1) 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
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

**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.
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 MANAGER** 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.
Department Selection: granularity

- **Department Selection:**
  - Specify the top node for which access is needed. Rights **CASCADE DOWN** to all sub-units 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 **rarely** 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.
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
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 4-digit code on the HR Tree
Section 5: Types of Access You Can Grant

• **Report Access**
  • Run various HR reports: for all employees, or limited to part-time employees
  • 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 role
  • 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)

<table>
<thead>
<tr>
<th>Role Name</th>
<th>Reports All Employees w/ Comp (previously BYU CD Manager)</th>
<th>Reports all employees no Comp (previously BYU CD Specialist)</th>
<th>Reports Part-time Employees w/Comp (previously BYU CD Supervisor)</th>
<th>Reports Part-Time Employees no comp (previously BYU CD Expert)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employees That Are Visible</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>All Employees (full time, ¾ time, faculty, students)</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Student Employees Only (Views department student and part-time (½ &amp; ¾) non student employees)</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td><strong>Compensation Visible</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Compensation Rates Visible</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Compensation Not Visible</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Reports</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Views all department employees</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sick and vacation - update</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Employee List</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payroll reports</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Part-time Non-student over 500 hours report</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Affordable Care Act (ACA) Reports</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>

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**Note:**
- Reports are organized by role and visibility, with specific details on what each role includes.
- The table provides a comprehensive overview of available reports, including compensation visibility and specific employee types.
# Common Hiring (Job Posting) Roles

Public platform at [yjobs.byu.edu](http://yjobs.byu.edu)

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

<table>
<thead>
<tr>
<th>Role Name</th>
<th>Student Job Posting</th>
<th>Staff / Admin Job Posting</th>
<th>College/Division Staff Posting Approver</th>
<th>Faculty Job Posting</th>
<th>Dept Faculty Job Posting Approver</th>
<th>College / Division Fac Posting Approver</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Summary:</strong></td>
<td>Access to post student jobs</td>
<td>Access to post staff and administrative jobs</td>
<td>College or Division Approver for staff and admin job postings. This role is needed to approve all job postings for non-student &amp; non-faculty jobs</td>
<td>Access to post Faculty jobs</td>
<td>Approves YJob postings for faculty positions that are then routed to the Dean or top-level approver.</td>
<td>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.</td>
</tr>
<tr>
<td><strong>Notes:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Faculty postings require 3 levels of approval. Posting level, Department level, and College level.</td>
</tr>
</tbody>
</table>

Individuals receiving job posting access are encouraged to take the appropriate online training module.
3 Types of eForm Access

- **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 → Department Approver → College/ Division Approver

- **Faculty eForm Roles**
  - Need 3 role levels assigned
  - User / Initiator → Department Chair → 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:

  - **eFORM User** initiates a STUDENT Salary Increase action for an employee → **eFORM Approver** receives notification and approves the action → **Salary Increase applied with Payroll**
  - **eFORM User** initiates a FULL-TIME Salary Increase action for an employee → **eFORM Approver** receives notification and approves the action → **eFORM College/Division Approver** takes action → **Salary Increase applied with Payroll**
  - **Staff/Admin Job Posting YJobs** User initiates a job posting for a STAFF or ADMIN job → **College/Division Approver** receives notification and approves the action → **Job Posting is made live on Yjobs.byu.edu**
  - **Faculty Job Posting YJobs** User initiates a job posting for a FACULTY job → **Dept Faculty Job Posting Approver** receives notification and approves this step of the action → **College/Division Faculty Posting Approver** receives notification and approves the action → **Job Posting is made live on Yjobs.byu.edu**
## Part-Time eForm Roles

<table>
<thead>
<tr>
<th>Role Name</th>
<th>Part-Time ePAF User</th>
<th>Part-Time ePAF Approver</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Summary:</strong></td>
<td>Create or initiate employment action changes for part-time employees</td>
<td>Approve employment action changes for part-time employees</td>
</tr>
<tr>
<td><strong>Actions:</strong></td>
<td>Submit:</td>
<td>Approve:</td>
</tr>
<tr>
<td></td>
<td>Hires and Terminations</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Account Code Changes</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Wage Changes</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Transfers or Supervisor Changes</td>
<td></td>
</tr>
<tr>
<td><strong>Class of Employees</strong></td>
<td>Student Employees</td>
<td>Non-Student part-time employees (1/2 time, ¾ time contract)</td>
</tr>
</tbody>
</table>
# Full-Time eForm Roles

<table>
<thead>
<tr>
<th>Role Name</th>
<th>Full-Time ePAF User</th>
<th>Full-time ePAF Approver</th>
<th>College/ Division Approver</th>
<th>FT Supplemental Comp (needed if only doing supp comp)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Summary:</strong></td>
<td>Create or initiate employment action changes for full-time employees</td>
<td>Approve employment action changes for full-time employees, which forwards request</td>
<td>Top level approver of full time eForm requests</td>
<td>Create Supplemental Compensation requests for full-time employees only, not full eForm access.</td>
</tr>
<tr>
<td><strong>Actions:</strong></td>
<td>Hires and Terminations, Account Code Changes, Wage Changes, Supplemental Comp Requests, Transfers or Supervisor Changes</td>
<td></td>
<td></td>
<td>Initiates request for supplemental compensation for staff and administrative employees.</td>
</tr>
<tr>
<td><strong>Class of Employees</strong></td>
<td>Full-time Staff and Administrative employees, and ¾ time employees</td>
<td>Full-time Staff and Administrative employees, and ¾ time employees</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Common Faculty eForm Roles

<table>
<thead>
<tr>
<th>Role Name</th>
<th>Faculty Contract ePAF User</th>
<th>Department Chair ePAF Approver</th>
<th>College Faculty ePAF Approver</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Summary:</strong></td>
<td>Create Contract ePAFs/eFORMS for Adjunct Faculty and Supplemental Letters of Appointment</td>
<td>Approves Contract ePAFs/eFORMS for Adjunct Faculty and Supplemental Letters of Appointment</td>
<td>Approves adjunct faculty contracts and supplemental letters of appointment.</td>
</tr>
<tr>
<td><strong>Action:</strong></td>
<td>Create or initiate, modify or end a contract for adjunct faculty. Create supplemental letters of appointment for full time faculty</td>
<td>Review and provide the intermediate (departmental) level approval</td>
<td>Final approval</td>
</tr>
<tr>
<td><strong>Class of Employees</strong></td>
<td>Full time faculty and Adjunct faculty</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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
Employment / Recruiting Portals

Recuriter Roles

- Student Employment Portal
- Staff / Admin Employment Portal
- Faculty Employment Portal

Click on icon above for link
YJobs Recruitment Site

Public facing recruiting page →
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
## Common Y Time Roles

<table>
<thead>
<tr>
<th>Role Name</th>
<th>Time Manager</th>
<th>Time Viewer</th>
<th>Y Time Reports - Controller</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Summary:</strong></td>
<td>Y-Time Access for department managers</td>
<td>View-only access to Y-Time</td>
<td>Y-Time report access for Controllers</td>
</tr>
<tr>
<td><strong>Actions:</strong></td>
<td>Can both view and correct time clock punches for employees within the nodes they are given access to.</td>
<td>Can view time clock punches for employees within the nodes they are given access to</td>
<td>Can run Y-Time reports for their assigned departments</td>
</tr>
</tbody>
</table>
HR System Security Questions

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