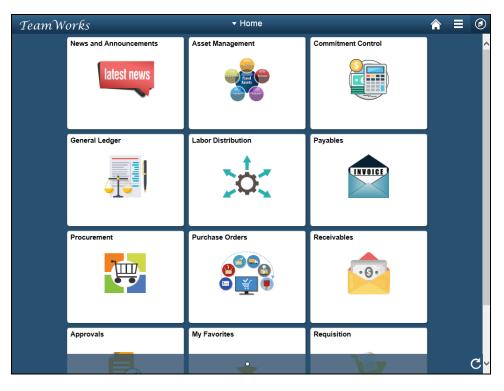


Reviewing the Activity Security Tab

Below are the process steps to Reviewing the Activity Security Tab. As you are performing the task, use this document to be a Step-by-Step guide for completing this process. At the end, please click the link to complete a quick survey as to the usefulness of this document.



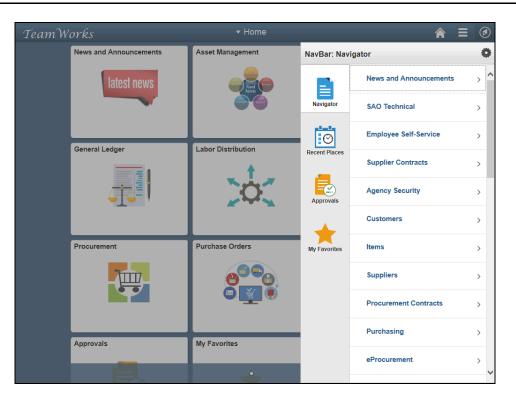
Step	Action
1.	Begin by navigating to the Manager Security Request page.
	Note: This simulation is an example of a transaction. When entering a transaction in the live TeamWorks Financials system, please select all values and options based on agency policy, the paperwork on hand and the current situation. Click the NavBar icon.



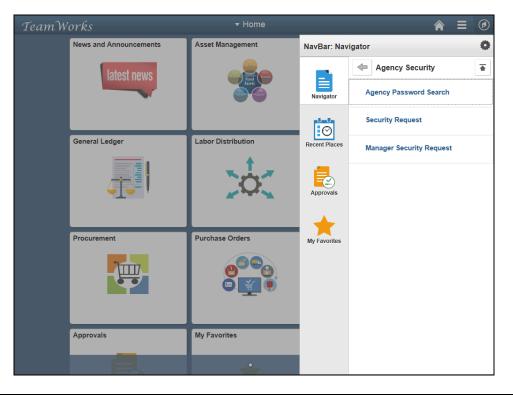
TeamWor	rks	▼ Home	4	
N	News and Announcements	Asset Management	Commitment Control	NavBar
G	General Ledger	Labor Distribution	Payables	Recent Places
F	Procurement	Purchase Orders	Receivables	My Favorites
A	Approvals	My Favorites	Requisition	

Step	Action
2.	Click the Navigator icon.
	Navigator





Step	Action
3.	Click the Agency Security link.
	Agency Security





Step	Action
4.	Click the Manager Security Request link.
	Manager Security Request

Manager Security Request		
Inter any information you have and click Searc	. Leave fields blank for a list of all values.	
Find an Existing Value Add a New Value		
▼Search Criteria		
Business Unit begins with 🗸	9	
Request ID begins with V	~	
Seq Nbr = V		
Requested Date = V		
Last Name begins with V		
Empl ID begins with V		
User ID begins with 🗸		
Action =	~	
Status = 🗸	\checkmark	
Access Type = 🗸	~	
Expiration Date =	31	
Case Sensitive		
Search Clear Basic Search	ave Search Criteria	
Busic Ocaren Ex		
ind an Existing Value Add a New Value		

Step	Action
5.	For this example, a new security request will need to be created.
	Click the Add a New Value tab.



K Home	♠ ≡ Ø
Manager Security Request	New Window Help 📰 -
Eind an Existing Value Add a New Value	
Business Unit Q. Request ID NEXT	
Add	
Find an Existing Value Add a New Value	

Step	Action
6.	Enter the appropriate information into the Business Unit field.
	For this example, type 40600 .
	Business Unit



∢ Home	♠ ≡ ∅
Manager Security Request	New Window Help 🔚 -
Eind an Existing Value Add a New Value	
Business Unit/40600 Q Request ID NEXT	
Add	
Find an Existing Value Add a New Value	

Step	Action
7.	Click the Add button.
	Add

Home											Â	
									Window	Help	Personalize	e Page 🛛 🖬
ecurity Request	Comments	Activity Security	Procurement Se	curity User Info	mation S	ecurity Approva	I Sta	tus History				
Business Unit:	40600 Bankir	ig and Finance, De	ot of	Request ID: NE	т	Request Seq N	lum:	1				
lectronic signature nderstanding that f the Official Code omputer/information	applicant is le of Georgia Ar	gally responsible	for the protection	of said ID/Passw	ord pursua	nt to Chapter 9	of Title	16				
Security Reques	t											
Requested Date:	08/06/2018)		*Action: Add	~							
*Status:	Draft		✓ *F	tequest Type: Em	oloyee 🗸							
Reject Reason:												
Source:	Online			Suppor	t Number:							
Entered by:	TOMANDJER	Tom And J	erry 770/770/7707	E	ntered on:	08/02/2018						
Submitted By:	TOMANDOLIN	(1	,									
Access Typ	e											
	Permanen	t O Te	mporary	Expi	ration Date							
Jser Data												
*User ID:				itial assword:]				
Empl ID: *First Name:		Mid	dle Initial:	*Last Name:								
Job Title:												
*Telephone:				Fax Number:								
Email Address:												
Business Add	ress											



Step	Action
8.	This is the initial page when entering a new Security Request.

								New W	indow	Help	Personaliz	re Page	I
ecurity Request	Comments A	ctivity Security	Procurement Sec	curity User	Information	Security Approval	Status H					io i ago	ľ
Business Unit:	40600 Banking	and Finance, Dept	of	Request ID:	NEXT	Request Seq Nur	n: 1						
nderstanding tha	at applicant is lega le of Georgia Ann	Ily responsible for	or the protection	of said ID/Pa	assword pursu), password and an lant to Chapter 9 of s all other applicab	f Title 16						
Security Reque	st												
*Requested Date:	08/06/2018			*Action:	Add	 Image: A start of the start of							
*Status:	Draft		✓ *R	equest Type:	Employee N	-							
Reject Reason:													
Source:	Online			Su	pport Number:								
Entered by: Submitted By:	TOMANDJERRY	Tom And Jen	ry 770/770/7707		Entered on:	08/02/2018							
		Tom And Jen	ry 770/770/7707		Entered on:	08/02/2018							
Submitted By:		Tom And Jen	-		Entered on: Expiration Dat								
Submitted By: Access Ty	rpe		-										
Submitted By: Access Ty	rpe		iporary	itial]					
Submitted By: Access Ty User Data	rpe		iporary										
Submitted By: Access Ty User Data *User ID:	rpe	⊖ Terr	iporary	itial	Expiration Dat								
Submitted By: Access Ty User Data *User ID: Empl ID:	rpe	⊖ Terr	iporary	itial assword:	Expiration Dat								
Submitted By: Access Ty User Data *User ID: Empl ID: *First Name:	rpe	⊖ Terr	iporary	itial assword:	Expiration Dat								
Submitted By: Access Ty User Data *User ID: Empl ID: *First Name: Job Title:	rpe	⊖ Terr	iporary	itial assword: *Last Name	Expiration Dat								

Step	Action
9.	In this exercise, we will take a closer look will be taken at the Activity Security tab.
	Click the User ID tab.



								Ne	w Window	/ Help	Personaliz	ze Page 📰
curity Request Co	mments Activity	Security P	rocurement	Security Us	er Information	Security Appro	val Sta	tus Histor	У			
Business Unit: 406	00 Banking and F	inance, Dept o		Request II	D: NEXT	Request Sec	q Num:	1				
ectronic signature of derstanding that app the Official Code of (mputer/information la	licant is legally re Georgia Annotate	sponsible for	the protecti	on of said ID/	Password pure	suant to Chapter	9 of Title	16				
ecurity Request												
Requested Date: 08/0	6/2018			*Actio	n: Add	~						
*Status: Drat	t	~		*Request Typ	e: Employee	\checkmark						
Reject Reason:												
Reject Reason: Source: Onli	ne			9	Support Numbe	er:						
-		om And Jerry	770/770/77			er: vn: 08/02/2018						
Source: Onli		om And Jerry	770/770/77									
Source: Onli Entered by: TOM		om And Jerry	770/770/77									
Source: Onli Entered by: TON Submitted By: Access Type		om And Jerry				on: 08/02/2018						
Source: Onli Entered by: TON Submitted By: Access Type	IANDJERRY T				Entered o	on: 08/02/2018						
Source: Onli Entered by: TOM Submitted By: Access Type () Seer Data *User ID:	IANDJERRY T				Entered o	on: 08/02/2018						
Source: Onli Entered by: TON Submitted By: Access Type ©	IANDJERRY T		orary	07 Initial	Entered of Expiration D	on: 08/02/2018]				
Source: Onli Entered by: TON Submitted By: Access Type (© Iser Data *User ID: Empl ID:	IANDJERRY T	⊖ Temp	orary	07 Initial Password:	Entered of Expiration D	on: 08/02/2018]				
Source: Onli Entered by: TON Submitted By: Access Type © Ser Data "User ID: Empi ID: "First Name:	IANDJERRY T	⊖ Temp	orary	07 Initial Password:	Entered o	on: 08/02/2018						
Source: Onli Entered by: TOM Submitted By: Access Type © Ser Data *User ID: Empl ID: *First Name: Job Title:	IANDJERRY T	⊖ Temp	orary	07 Initial Password: *Last Nam	Entered o	on: 08/02/2018						
Source: Onli Entered by: TOM Submitted By: Access Type • ser Data *User ID: Empl ID: *First Name: Job Title: *Telephone: mail	Permanent	⊖ Temp	orary	07 Initial Password: *Last Nam	Entered o	on: 08/02/2018						

Step	Action
10.	Enter the appropriate information into the User ID field.
	For this example, type HHENDERSON .

Home									A ≡	C
							New Windo	w Help Pe	ersonalize Page	
ecurity Request	Comments Activity	Security Procurem	ent Security Us	er Information	Security Approval	Status H	istory			
Business Unit:	40600 Banking and F	inance, Dept of	Request IC): NEXT	Request Seq Num	: 1				
nderstanding that	e of Security Officer a applicant is legally re of Georgia Annotate on laws.	sponsible for the prof	tection of said ID/F	Password pursu	ant to Chapter 9 of					
Security Reques	t									
Requested Date:	08/06/2018 🛐		*Action	n: Add	/					
*Status:	Draft	~	*Request Type	e: Employee	-					
Reject Reason:										
Source:	Online		5	Support Number						
Entered by:	TOMANDJERRY 1	om And Jerry 770/77			08/02/2018					
Submitted By:	TOWARDOLLINT .									
Access Typ)e									
	Permanent	○ Temporary		Expiration Dat	e					
Jser Data										
*User ID: HH	ENDERSON		Initial							
Empl ID:			Password:							
*First Name:		Middle Initial:	*Last Nam	e:						
Job Title:										
*Telephone:			Fax Numbe	er:						
Email										
Address: Business Add										
Dusiness Add	less									
Address Lin	ie 1:									



Step	Action
11.	Press [Tab].
	K Home 🎓 🗏 🥑
	Security Request Comments Activity Security Procurement Security User Information Security Approval Status History
	Business Unit: 40600 Banking and Finance, Dept of Request ID: 0000000016 Request Seq Num: 1
	Electronic signature of Security Officer and Supervisor acknowledges application, receipt for ID, password and an understanding that applicant is legally responsible for the protection of said ID/Password pursuant to Chapter 9 of Title 16 of the Official Code of Georgia Annotated, Georgia Computer System Protection Act, as well as all other applicable computer/information laws.
	Security Request
	*Requested Date: 08/06/2018

Security Reque	st				
*Requested Date:	08/06/2018		*Action:	Add 🗸	
*Status:	Manager Submitted	~	*Request Type:	Employee V	
Reject Reason:					
Source:	Online		Su	pport Number:	
Entered by:	TOMANDJERRY	Tom And Jerry 770/770/77	07	Entered on: 08/01/2018	
Submitted By:					
Access Ty	pe				
	Permanent	○ Temporary		Expiration Date	
User Data					
*User ID: H	HENDERSON		Initial		
Empl ID: 00	3003003		Password:		
*First Name: Ha		Middle Initial: A	*Last Name	Henderson	
Job Title: Ad	counting Director 1				
*Telephone: 77	70/770-7707		Fax Number	986/986-9869	
	nenderson@anywhere	eusa.ga.gov			
Address: Business Add	Irona				1
Dusiliess Aut	11622				
Address Li	ine 1:				
Address Li	ne 2:				

Step	Action
12.	Click the Activity Security tab.
	Activity Security



K Home 😭 🗮 🕑
New Window Help Personalize Page 🗃
Security Request Comments Activity Security Procurement Security User Information Security Approval Status History
Business Unit: 40600 Banking and Finance, Dept of Request ID: 0000000016 Request Seq Num: 1
Expand each module individually by clicking the triangle in the blue module header. Collapse the individual expanded module by clicking the triangle in the blue module header. You can also expand/collapse all modules by clicking the buttons below.
Expand All Collapse All
Check all that are applicable.
Accounts Payable
Accounts Receivable
Asset Management
Commitment Control
Customers
▶ General Ledger
Labor Distribution
Open Item
Purchasing
Query
Salary-Travel-Per Diem
Vendors
Expand each module individually by clicking the triangle in the blue module header. Collapse the individual expanded module by clicking the triangle in the blue module header. You can also expand/collapse all modules by clicking the buttons below.
Expand All Collapse All
🐘 Save 🔯 Return to Search 👖 Previous in List 🚛 Next in List 💭 Update/Display
ecurity Request Comments Activity Security Procurement Security User Information Security Approval Status History

Step	Action
13.	This is the Activity Security page. This page allows the manager to select roles for employees and contractors. Access can be added or removed.
	Notice the different modules that can be expanded.



< Home	
	New Window Help Personalize Page I
Security Request Comments Activity Security Procurement Security User Information Security Approval Status Histo	
Business Unit: 40600 Banking and Finance, Dept of Request ID: 0000000016 Request Seq Num: 1	
Expand each module individually by clicking the triangle in the blue module header. Collapse the individual expanded	
module by clicking the triangle in the blue module header. You can also expand/collapse all modules by clicking the buttons	
below.	
Expand All Collapse All	
Check all that are applicable.	
Accounts Payable	
Accounts Receivable	
Asset Management	
Commitment Control	
Customers	
General Ledger	
Labor Distribution	
Øpen Item	
▶ Purchasing	
▶ Query	
Salary-Travel-Per Diem	
Vendors	
Expand each module individually by clicking the triangle in the blue module header. Collapse the individual expanded module by clicking the triangle in the blue module header. You can also expand/collapse all modules by clicking the buttons below.	
Expand All Collapse All	
🔛 Save 🔯 Return to Search 🌴 Previous in List 🚛 Next in List 🔲 Add 🔊 Update/Display	
Security Request Comments Activity Security Procurement Security User Information Security Approval Status History	

Step	Action
14.	Let's take a look at the Accounts Payable section.
	Click the Expand Section button.
	Accounts Payable Accounts Restivable
	Asset Management Commitment Control
	Customers General Lodger
	Labor Distribution Den Item Open Item Purchasing
	Guery Salary-Travel-Per Diem
	> Vendors



		New Window Help Personalize Page
ty Request	Comme	nts Activity Security Procurement Security User Information Security Approval Status History
iness Unit:	40600	Banking and Finance, Dept of Request ID: 0000000016 Request Seq Num: 1
ule by clicki v. pand All k all that ar	ng the tria Collapse re applicat	
Accounts F	Payable	
Add	Remove	Personalize Find 🖉 🔜 First 🕔 1-12 of 12 🕖 Last
1	Remove	Inquiry, Reports & Query
2	✓	1099 Processing
3		Bank Reconciliation
4	V	Create Express Checks
5	V	Create Recurring Voucher Contracts
	V	Create SpeedCharts
6	V	Process Vouchers
6 🗌 7 🗌	✓	Payment Processing
_		Schedule Pay Cycle
7	✓	
7	✓ ✓	Voucher Entry
7 □ 8 □ 9 □		Voucher Entry TIGA Reporting Obligations
7 □ 8 □ 9 □	✓	
7 □ 8 □ 9 □ 10 □	¥ ¥	TIGA Reporting Obligations TIGA Reporting Payments

Step	Action
15.	Once a module is expanded, roles specific access can be added or removed.
	To add activities to an employee or contractor check the Add button within each module.
	To remove activities from an employee or contractor, click the Remove button.



								New Wind	ow Help	Personalize Pag	e
urity Reques	Comme	Activity Security	Procurement Se	curity User	r Information	Security Approval	Status H	istory			
usiness Uni	t: 40600	Banking and Finance, Dept o	f	Request ID:	000000016	Request Seq N	ım: 1				
pand each i	nodule indiv	vidually by clicking the tria	gle in the blue	module head	er. Collapse	he individual expa	nded				
dule by clic ow.	king the tria	ngle in the blue module he	ader. You can	also expand/o	collapse all m	odules by clicking	the buttons				
Expand All	Collapse	e All									
eck all that	aro applical										
		Jie.									
Accounts	Payable										
Activities			Perso	nalize Find	ي ا ك	First 🕚 1-12 of 12	🕑 Last				
Add	Remove	Description Inquiry, Reports & Query									
	✓										
2	 ✓ 	1099 Processing Bank Reconciliation									
		Bank Reconciliation									
3		On the English of the last									
4		Create Express Checks									
4	V	Create Recurring Voucher	Contracts								
4 □ 5 □ 6 □		Create Recurring Voucher Create SpeedCharts	Contracts								
4 □ 5 □ 6 □ 7 □		Create Recurring Voucher Create SpeedCharts Process Vouchers	Contracts								
4 □ 5 □ 6 □ 7 □ 8 □		Create Recurring Voucher Create SpeedCharts Process Vouchers Payment Processing	Contracts								
4		Create Recurring Voucher Create SpeedCharts Process Vouchers Payment Processing Schedule Pay Cycle	Contracts								
4		Create Recurring Voucher Create SpeedCharts Process Vouchers Payment Processing Schedule Pay Cycle Voucher Entry									
4 [5] 6] 7] 8] 9] 10] 11]		Create Recurring Voucher Create SpeedCharts Process Vouchers Payment Processing Schedule Pay Cycle Voucher Entry TIGA Reporting Obligations									
4		Create Recurring Voucher Create SpeedCharts Process Vouchers Payment Processing Schedule Pay Cycle Voucher Entry TIGA Reporting Obligations TIGA Reporting Payments									
4 [5] 6] 7] 8] 9] 10] 11]		Create Recurring Voucher Create SpeedCharts Process Vouchers Payment Processing Schedule Pay Cycle Voucher Entry TIGA Reporting Obligations TIGA Reporting Payments									

Step	Action
16.	If the modules need to all be viewed simultaneously, there is an Expand All button.
	Click the Expand All button.



		New Window Help Perso	nalize Page 🛛 📰
urity Reques	t Comme	ments Activity Security Procurement Security User Information Security Approval Status History	
usiness Uni	t 40600	Banking and Finance, Dept of Request ID: 0000000016 Request Seq Num: 1	
		dividually by clicking the triangle in the blue module header. Collapse the individual expanded riangle in the blue module header. You can also expand/collapse all modules by clicking the buttons	
ow.	king the tha	langie in the blue module neader. You can also expandicollapse all modules by clicking the buttons	
Expand All	Collapse		
Expand All	Collapse		
eck all that	are applicat	able.	
Accounts	Davabla		
	Payable		
Activities Add	Remove	Personalize Find 🖾 🔜 First 🕚 1-12 of 12 🕑 Last	
1		Inquiry, Reports & Query	
2	V	1099 Processing	
3	V	Bank Reconciliation	
4	V	Create Express Checks	
5	Image: A start and a start	Create Recurring Voucher Contracts	
6	V	Create SpeedCharts	
	V	Process Vouchers	
7 🗆	V	Payment Processing	
7	↓	Schedule Pay Cycle	
7	_	Schedule Pay Cycle Voucher Entry	
7 □ 8 □ 9 □			
7 □ 8 □ 9 □ 10 □	✓ ✓	Voucher Entry	
7 8 9 10 11 12		Voucher Entry TIGA Reporting Obligations TIGA Reporting Payments	
7 8 9 10 11 12		Voucher Entry TIGA Reporting Obligations TIGA Reporting Payments	

Step	Action
17.	Scroll down to see how all of the modules have been expanded. Notice the various types of roles that can be added.
	Click the Vertical scrollbar to view additional fields on the page.



lome		Horritepolary obligations			Â	
12	V	TIGA Reporting Payments				
Accou	nts Receivab	le				
Activiti	es		Personalize Find 💷 🔜	First 🕚 1-6 of 6 🕑 Last		
Add	Remove	Description				
1	\checkmark	Inq, Rep & Qry Items & Customers				
2	V	Direct Journal Upload				
3	v	Items Entry				
4	 Image: A start of the start of	Open Item Upload				
5	v	Payments Entry				
6	v	Summary & Setup				
Asset	Management					
Activiti	es		Personalize Find 💷 🔜	First 🕚 1-4 of 4 🕑 Last		
Add	Remove	Description				
1	\checkmark	Inquiry, Reports & Query				
2	\checkmark	Add Locations				
3 🗌	\checkmark	Data Entry				
4	\checkmark	Interface				
Comm	itment Contro	bl				
Activiti	es		Personalize Find 💷 🔢	First 🕢 1-5 of 5 🛞 Last		
Add	Remove	Description				
1	\checkmark	Budget Inquiry, Reports & Query				
2	v	Budget Data Entry				
3 🗌	✓	Budget Override AP				
4	\checkmark	Budget Override GL				
5	V	Budget Override PO				
Custor	ners					
Activiti	es		Personalize Find 💷 🔢	First 🕚 1-2 of 2 🕑 Last		
Add	Remove	Description				
4		Quetemor Inquiry, Deporte & Query				

Step	Action
18.	Continue to click the Vertical scrollbar to view additional fields on the page.

		-			_	
	ent Contro	l				
Activities			Personalize Find 💷 🔜	First 🕚 1-5 of 5 🕑 Last		
Add	Remove	Description				
1	V	Budget Inquiry, Reports & Query				
2		Budget Data Entry				
3	V	Budget Override AP				
4	✓	Budget Override GL				
5	\checkmark	Budget Override PO				
Customer	5					
Activities			Personalize Find 💷 🔜	First 🕚 1-2 of 2 🕭 Last		
Add	Remove	Description				
1	\checkmark	Customer Inquiry, Reports & Query				
2	\checkmark	Customer Entry				
General L	edger					
Activities			Personalize Find 🗖 🌆	First 🕚 1-6 of 6 🕑 Last		
Add	Remove	Description				
1	\checkmark	Inquiry, Reports & Query				
2		Chartfield Maintenance				
3	\checkmark	Interface Journal Upload				
4	\checkmark	Journal Entry				
5	\checkmark	Journal Processing				
6	\checkmark	Maintenance Standard Budget				
Labor Dis	tribution					
Activities			Personalize Find 💷 🔜	First 🕚 1-4 of 4 🕑 Last		
Add	Remove	Description				
1	✓	LD Inquiry, Reports & Query				
	✓	Offline Upload				
2						



Step	Action
19.	Continue to click the Vertical scrollbar to view additional fields on the page.

lome					<u> </u>	r —
Labor Di	stribution					
Activities			Personalize Find 💷 🔜	First 🕚 1-4 of 4 🕭 Last		
Add	Remove	Description				
1		LD Inquiry, Reports & Query				
2		Offline Upload				
3	\checkmark	Update Labor Distribution				
4		Release Labor				
Open Ite	m					
Activities			Personalize Find 🖾 🔜	First 🕚 1 of 1 🕑 Last		
Add	Remove	Description				
1	✓	Open Item Maintenance				
Purchas	ing					
Activities	;		Personalize Find 💷 🔜	First 🕚 1-9 of 9 🕭 Last		
Add	Remove	Description				
1	\checkmark	Inquiry, Reports & Query				
2	✓	PO Amount Approver				
3	\checkmark	PO Chartfield Approver				
4	✓	Item Maintenance				
5	✓	Procurement Contracts				
6	✓	Purchase Orders				
7	√	Receiving				
8	√	Requisitions				
9	✓	RFQ's				
Query						
Activities			Personalize Find 💷 🔜	First 🕚 1-2 of 2 🕑 Last		
Add	Remove	Description				
1	✓	Build Query				
2		Schedule Queries				

Step	Action
20.	Continue to click the Vertical scrollbar to view additional fields on the page.



lome						
4	V	Item Maintenance				
5	v	Procurement Contracts				
6	✓	Purchase Orders				
7	v	Receiving				
8	✓	Requisitions				
9	V	RFQ's				
Query						
Activities			Personalize Find 🗖 🔢 Firs	t 🕘 1-2 of 2 🕑 Last		
Add	Remove	Description				
1	✓	Build Query				
2	V	Schedule Queries				
Salary-Ti	avel-Per D	iem				
Activities			Personalize Find 💷 🔢 Firs	t 🕚 1-3 of 3 🕑 Last		
Add	Remove	Description				
1	✓	Inquiry, Reports & Query				
2	✓	Edit				
3	✓	Approval (only2 per agy)				
Vendors						
Activities			Personalize Find 💷 🔜 Firs	t 🕚 1-2 of 2 🕑 Last		
Add	Remove	Description				
1	✓	Vendor Inquiry, Reports & Query				
2	✓	Vendor Entry				
ule by clic w. xpand All	king the tria	angle in the blue module header. Yo	e blue module header. Collapse the inc ou can also expand/collapse all module			
ave 🔯	Return to Se	arch 🕇 Previous in List 🚛	Next in List	Update/Display		

Step	Action
21.	Now, let's add some access in some of the modules.
	Click the Vertical scrollbar to return to the top of the page.

		N	ew Window Help Personalize F	Page
rity Request	Comme	nts Activity Security Procurement Security User Information Security Approval Status History	ory	
siness Unit:	40600	Banking and Finance, Dept of Request ID: 0000000016 Request Seq Num: 1		
Siness onic	40000			
		ridually by clicking the triangle in the blue module header. Collapse the individual expanded		
ule by click w.	ing the trial	ngle in the blue module header. You can also expand/collapse all modules by clicking the buttons		
xpand All	Collapse	All		
ck all that a	re annlicat			
		10.		
Accounts	Payable			
Activities		Personalize Find 🖾 🔢 First 🛞 1-12 of 12 🛞 Last		
Add	Remove	Description		
1	✓	Inquiry, Reports & Query		
2	✓	1099 Processing		
3	✓	Bank Reconciliation		
4	✓	Create Express Checks		
5	~	Create Recurring Voucher Contracts		
6	V	Create SpeedCharts		
7	~	Process Vouchers		
_	V	Payment Processing		
8	~	Schedule Pay Cycle		
8 🗌 9 🗌	×	Voucher Entry		
		TIGA Reporting Obligations		
9	V			
9 🗌 10 🗌	 ✓ 	TIGA Reporting Payments		
9 🗌 10 🗌 11 🗌	V			
9 10 11 12	V			

Job Aid



Step	Acti	on						
22.	Let's	Let's add access for Inquiry, Reports & Query						
	Click Account Activities	Payable	e Add option.	First & 1-12-0112 & Last				
	Add	Renove	Description Ingury, Reports & Query					
	2 🗆	e V	1099 Processing					
	20	8	Bank Reconciliation					
	4 🗆	2	Create Express Checke					
	5 🗀	8	Create Recurring Veucher Contracts					
	6 🗆		Onate SpeedCharts					
	7 🗖	8	Process Vouchers					
	0	8	Payment Processing					
	9 🗆	8 8	Schedule Pay Cycle Voucher Entry					
	11 -	8	TICA Reporting Obligations					
	12 🗆	8	TICA Reporting Payments					

						1	New Window	Help Per	rsonalize Page
urity Request	Comme	Activity Security	Procurement Securit	ty User Information	Security Approval	Status His	tory		
lusiness Unit:	40600	Banking and Finance, Dept (of Re	quest ID: 000000001	6 Request Seq Nu	m: 1			
dule by click		idually by clicking the tria ngle in the blue module h							
low.									
Expand All	Collapse	All							
eck all that a	re annlicat	le							
Accounts	Payable								
Activities	Remove	Description	Personaliz	te Find 🖾 🔜	First 🕚 1-12 of 12	Last			
1	Remove	Inquiry, Reports & Query							
2		1099 Processing							
3 🗆		Bank Reconciliation							
4		Create Express Checks							
5 🗆		Create Recurring Voucher	Contracts						
	 ✓ 	Create Recurring Voucher Create SpeedCharts	Contracts						
5	X	_	Contracts						
5		Create SpeedCharts	Contracts						
5 □ 6 □ 7 □	v	Create SpeedCharts Process Vouchers	Contracts						
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5 () 6 () 7 () 8 () 9 () 10 ()		Create SpeedCharts Process Vouchers Payment Processing Schedule Pay Cycle Voucher Entry	S						
5 6 7 8 9 10 11 12		Create SpeedCharts Process Vouchers Payment Processing Schedule Pay Cycle Voucher Entry TIGA Reporting Obligation TIGA Reporting Payments	S						
5		Create SpeedCharts Process Vouchers Payment Processing Schedule Pay Cycle Voucher Entry TIGA Reporting Obligation TIGA Reporting Payments	S	alize Find 🔄 🗱	First 🛞 1-6 of 6	I ast			

Step	Action
23.	Now, scroll down to the Commitment Control module.
	Click the Vertical scrollbar to view the Commitment Control module.



12	⊻	TIGA Reporting Payments				
Ассон	unts Receivab	le				
Activit	ties		Personalize Find 💷 🌆	First 🕙 1-6 of 6 🙆	Last	
Add		Description				
1	✓	Ing, Rep & Qry Items & Customers				
2	✓	Direct Journal Upload				
3 🗌	✓	Items Entry				
4		Open Item Upload				
5 🗌	✓	Payments Entry				
6	✓	Summary & Setup				
Asset	Management					
Activit	ties		Personalize Find 💷 🎩	First 🕚 1-4 of 4 🙆	Last	
Add	d Remove	Description				
1	✓	Inquiry, Reports & Query				
2	✓	Add Locations				
3 🗌	\checkmark	Data Entry				
4	✓	Interface				
Comn	nitment Contro	bl				
Activit	ties		Personalize Find 💷 🎩	First 🕚 1-5 of 5 🙆	Last	
Add	d Remove	Description				
1	✓	Budget Inquiry, Reports & Query				
2	✓	Budget Data Entry				
3 🗌	Image: A start and a start	Budget Override AP				
4	 Image: A start of the start of	Budget Override GL				
5 🗌	✓	Budget Override PO				
Custo	omers					
Activit	ties		Personalize Find 💷 🔜	First 🕚 1-2 of 2 🙆	Last	
Add	d Remove	Description				
1	✓	Customer Inquiry, Reports & Query				

Step	Action		
24.	Let's add	the B	udget Inquiry, Reports and Query access.
	Click the		- 1
	Activities		Personalize Find 🖾 🧱 First 🕚 1-5 of 5 🕑 Last
	Add	Remove	Description
	1	✓	Budget Inquiry, Reports & Query
	2	\checkmark	Budget Data Entry
	3	\checkmark	Budget Override AP
	4	~	Budget Override GL
	5	 Image: A set of the set of the	Budget Override PO



12			HGA Reporting Payments			
Ac	counts	Receivab	e			
Act	ivities			Personalize Find 💷 醌	First 🕙 1-6 of 6 🕑 Last	
	Add	Remove	Description			
1		\checkmark	Ing, Rep & Qry Items & Customers			
2		\checkmark	Direct Journal Upload			
3		V	Items Entry			
4		\checkmark	Open Item Upload			
5		~	Payments Entry			
6		V	Summary & Setup			
As	set Mai	nagement				
Act	ivities			Personalize Find 💷 🔜	First 🕢 1-4 of 4 🕑 Last	
-	Add	Remove	Description			
1		\checkmark	Inquiry, Reports & Query			
2		\checkmark	Add Locations			
3		\checkmark	Data Entry			
4		V	Interface			
Со	mmitm	ent Contro	bl			
Act	ivities			Personalize Find 💷 🔜	First 🕢 1-5 of 5 🕑 Last	
	Add	Remove	Description			
1			Budget Inquiry, Reports & Query			
2			Budget Data Entry			
3		~	Budget Override AP			
4		V	Budget Override GL			
5		~	Budget Override PO			
Cu	stomer	'S				
Act	ivities			Personalize Find 🗖 🔜	First 🕚 1-2 of 2 🕑 Last	
	Add	Remove	Description			
1		\checkmark	Customer Inquiry, Reports & Query			

Step	Action
25.	Click the Vertical scrollbar to view the bottom of the page.

Hor	ne			â	Ξ	
4		Image: A state of the state	Item Maintenance			
5		V	Procurement Contracts			
6		V	Purchase Orders			
7		~	Receiving			
8		V	Requisitions			
9		~	RFQ's			
Qu	ery					
Act	tivities		Personalize Find 💷 🧱 First 🕚 1-2 of 2 🛞 Last			
	Add	Remove	Description			
1		✓	Build Query			
2		✓	Schedule Queries			
Sa	lary-Tra	vel-Per D	iem			
Act	tivities		Personalize Find 💷 🧱 🛛 First 🕚 1-3 of 3 🛞 Last			
	Add	Remove	Description			
1		✓	Inquiry, Reports & Query			
2		\checkmark	Edit			
3		 Image: A start of the start of	Approval (only2 per agy)			
Ve	ndors					
Act	tivities		Personalize Find 🖾 🧱 🛛 First 🕥 1-2 of 2 👀 Last			
	Add	Remove	Description			
1		\checkmark	Vendor Inquiry, Reports & Query			
2		~	Vendor Entry			
pand odule	leach m	nodule indi	Vendor Entry vidually by clicking the triangle in the blue module header. Collapse the individual expanded angle in the blue module header. You can also expand/collapse all modules by clicking the buttons			
low.						
Expa	nd All	Collaps	e All			
Save	<u>م</u> ۲ F	Return to Se	arch † Previous in List 🗐 Next in List			
rity R	o li teorino	Comments	Activity Security Procurement Security User Information Security Approval Status History			



Step	Action
26.	We have finished adding access in the modules. Always be sure to save your work.
	Click the Save button.

lome			
kpand All	Collapse	IA e	
ck all that	are applical	ble.	
Accounts	Payable		
Activities		Personalize Find 🖾 🔢 🛛 First 🕚 1-12 of 12 👀 Last	
Add	Remove	Description	
1 🖌		Inquiry, Reports & Query	
2	\checkmark	1099 Processing	
3	\checkmark	Bank Reconciliation	
4	\checkmark	Create Express Checks	
5	✓	Create Recurring Voucher Contracts	
6	\checkmark	Create SpeedCharts	
7	✓	Process Vouchers	
8	\checkmark	Payment Processing	
9	V	Schedule Pay Cycle	
10	V	Voucher Entry	
11 🗆	V	TIGA Reporting Obligations	
12	V	TIGA Reporting Payments	
Accounts	Receivabl	e	
Activities		Personalize Find 🖾 🔜 First 🕚 1-6 of 6 🛞 Last	
Add	Remove	Description	
1	✓	Inq, Rep & Qry Items & Customers	
2	V	Direct Journal Upload	
3	\checkmark	Items Entry	
4	\checkmark	Open Item Upload	
5		Payments Entry	
6	✓	Summary & Setup	

Step	Action
27.	Instead of closing each module individually, there is a Collapse All button that can close each module. Click the Collapse All button. Collapse All



K Home 😭 🗮 🧭
New Window Help Personalize Page
Security Request Comments Activity Security Procurement Security User Information Security Approval Status History
Business Unit: 40600 Banking and Finance, Dept of Request ID: 0000000016 Request Seq Num: 1
Expand each module individually by clicking the triangle in the blue module header. Collapse the individual expanded module by clicking the triangle in the blue module header. You can also expand/collapse all modules by clicking the buttons below.
Expand All Collapse All
Check all that are applicable.
Accounts Payable
Accounts Receivable
Asset Management
Commitment Control
▶ Customers
General Ledger
▶ Labor Distribution
▶ Open Item
▶ Purchasing
> Query
Salary-Travel-Per Diem
> Vendors
Expand each module individually by clicking the triangle in the blue module header. Collapse the individual expanded module by clicking the triangle in the blue module header. You can also expand/collapse all modules by clicking the buttons below.
Expand All Collapse All M Save Charlen to Search 1 Previous in List Next in List L Add D Update/Display
curity Request Comments Activity Security Procurement Security User Information Security Approval Status History

Step	Action
28.	Notice now all of the modules are closed.

K Home	A ≡ ∅
	New Window Help Personalize Page 📰
Security Request Comments Activity Security Procurement Security User Information Security Approval Status His	tory
Business Unit: 40600 Banking and Finance, Dept of Request ID: 0000000016 Request Seq Num: 1	
Expand each module individually by clicking the triangle in the blue module header. Collapse the individual expanded module by clicking the triangle in the blue module header. You can also expand/collapse all modules by clicking the buttons below.	
Expand All Collapse All	
Check all that are applicable.	
Accounts Payable	
Accounts Receivable	
Asset Management	
Commitment Control	
Customers	
▶ General Ledger	
Labor Distribution	
Øpen Item	
Purchasing	
▶ Query	
Salary-Travel-Per Diem	
Vendors	
Expand each module individually by clicking the triangle in the blue module header. Collapse the individual expanded module by clicking the triangle in the blue module header. You can also expand/collapse all modules by clicking the buttons below.	
Expand All Collapse All	
Save Return to Search † Previous in List Next in List Update/Display	
ecurity Request Comments Activity Security Procurement Security User Information Security Approval Status History	



Step	Action
29.	Click here (<u>https://www.surveymonkey.com/r/25KG2HH</u>) to take a quick survey.

Thank you!