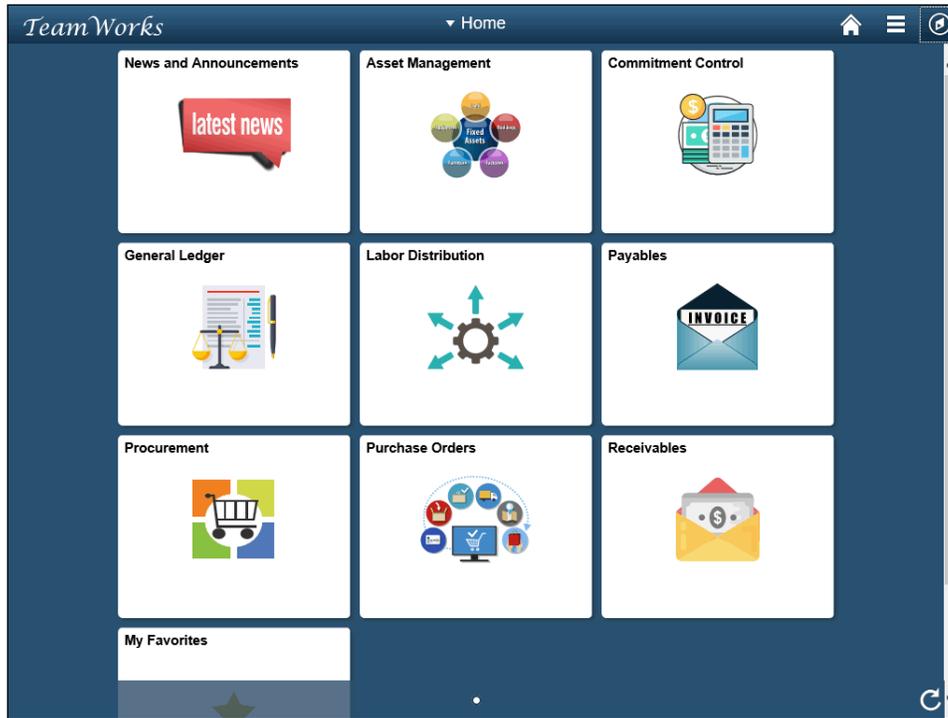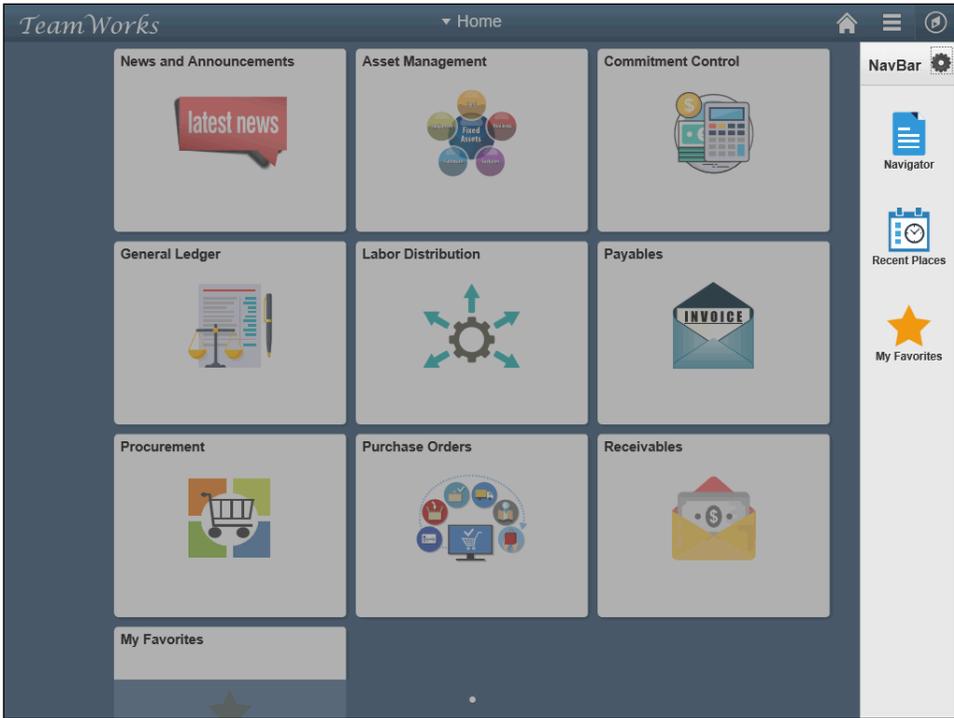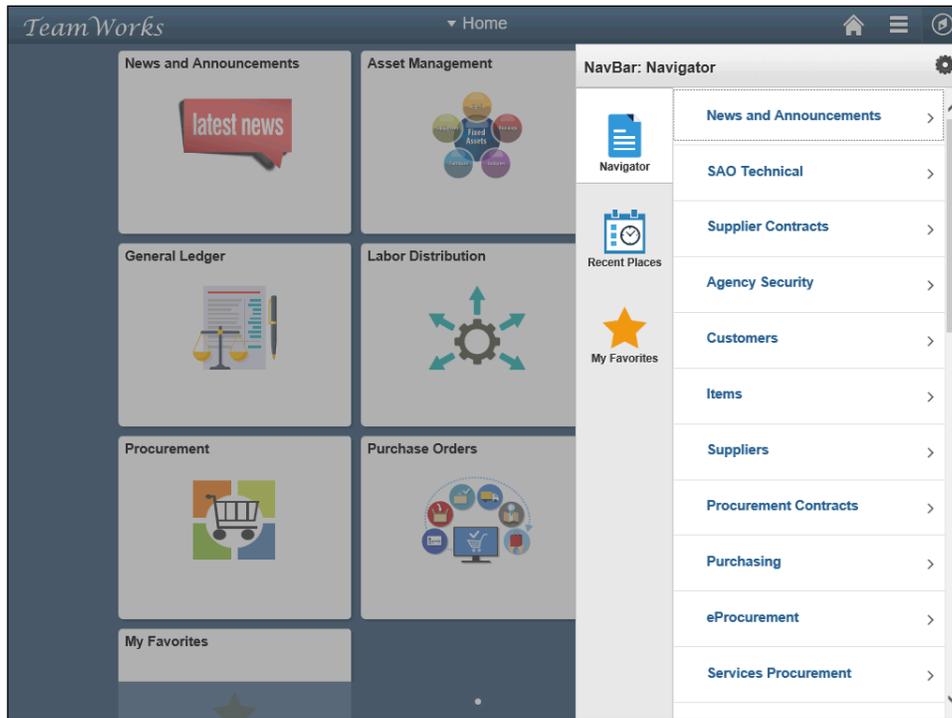# Generic Requester ID - Security Request FN

Below are the process steps to Change Procurement Security Access. 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.
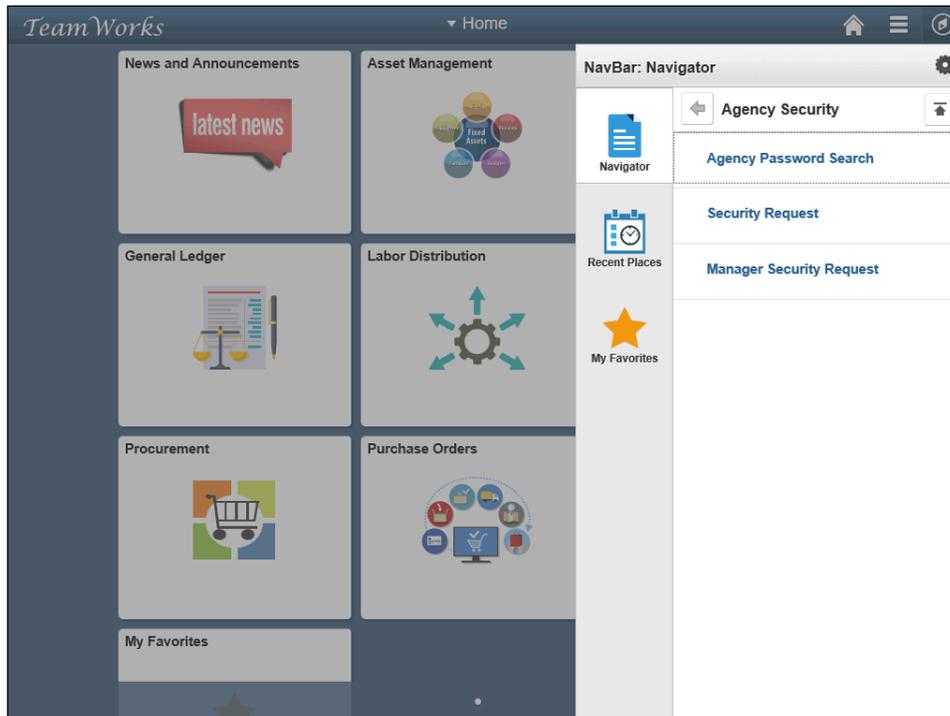

Step	Action
1.	Begin by navigating to the **Manager Security Request** page. **Note:** This simulation is an example of a transaction. When entering a transaction in the live TeamWorks Financials system, please select all values and options based on agency policy, the paperwork on hand and the current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

Job Aid

Step	Action
2.	Click the **Navigator** icon.

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

Step	Action
4.	Click the **Manager Security Request** link. **Manager Security Request**
5.	Save page to **My Favorites** (if applicable). For more information, please refer to: *Introduction to TeamWorks Financials 9.2; Working with TeamWorks Data 9.2*: Adding Favorites 9.2.

Step	Action
6.	Click the **Add a New Value** tab.

Step	Action
7.	Click in the **Business Unit** field. Business Unit [ ] 🔍
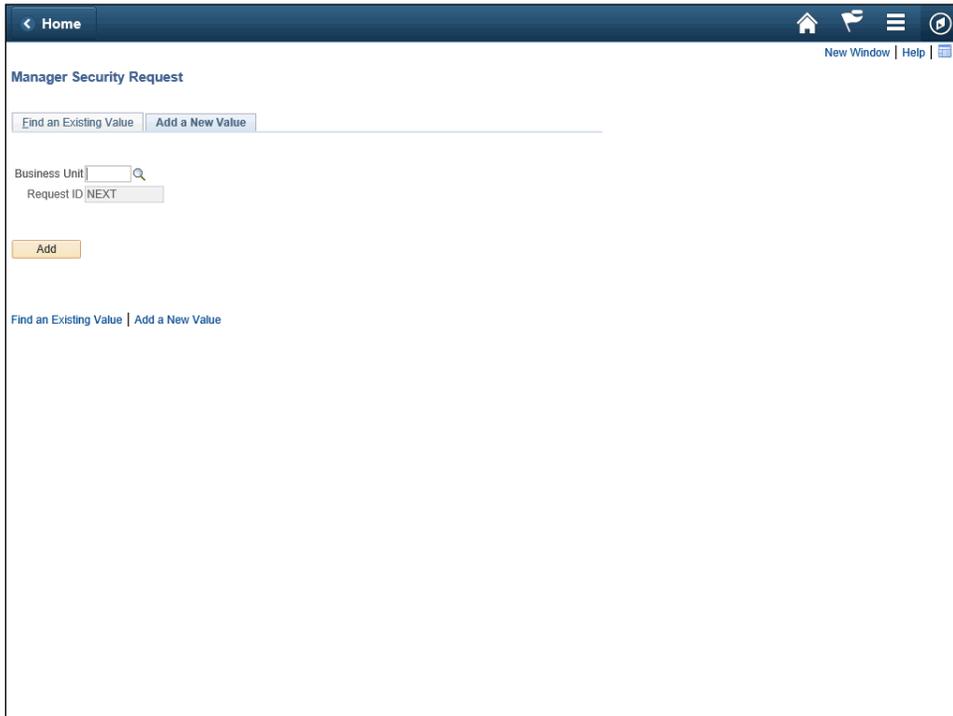
Step	Action
8.	Enter the appropriate information into the **Business Unit** field. For this example, type **41500**.

Step	Action
9.	Click the **Add** button.

Step	Action
10.	The Security Request page will appear for the manager to enter the Generic Requester ID information. First, the **Request Type** will be changed to reflect *TGM Requester*. **Note:** All fields with an * are required.

Step	Action
11.	Click the **Request Type** dropdown arrow. *Request Type: Employee ▾

Step	Action
12.	Click the **TGM Rqstr** list item.

Step	Action
13.	The *Access Type* for Generic Requester IDs will be Temporary. Click the **Temporary** option. ⬚Temporary

Step	Action
14.	Make the **Expiration Date** at least a couple of years out from the **Requested Date**. Click in the **Expiration Date** field.

Step	Action
15.	For this example, type **03042024**.

Step	Action
16.	The **User ID** is the valid origin code for your Business Unit. Click in the **User ID** field. *User ID: [ ]

Step	Action
17.	For Generic Requester IDs, the **User ID** must be 9 characters in length: • The first 5 characters must match the business unit. • The 6th character must be an underscore. • The last 3 characters must be a valid origin code. For this example, type **41500_TRV**.
18.	The **Initial Password** field is not required. For this example, it will be skipped.

Step	Action
19.	Click in the **First Name** field.
	*First Name:

Step	Action
20.	Enter the appropriate information into the **First Name** field. For this example, type **TRAVEL**.

Step	Action
21.	Click in the **Last Name** field. *Last Name:

Step	Action
22.	Enter the appropriate information into the **Last Name** field. For this example, type **AUTOMATION**.

Step	Action
23.	Click in the **Telephone** field. *Telephone: [_____]

Step	Action
24.	Enter the appropriate information into the **Telephone** field. For this example, type **4046781234**.

Step	Action
25.	Click in the **Email Address** field.

Step	Action
26.	Enter the appropriate information into the **Email Address** field. For this example, type **travel.automation@sao.ga.gov**.
27.	Click the **Vertical** scrollbar.

Step	Action
28.	The *Supervisor's Information* should contain the information of the manager entering the Generic Requester ID. Click in the **Name** field. *Name: _____

Step	Action
29.	For this example, type **Travel Auto**.

Step	Action
30.	Click in the **Telephone** field. *Telephone:

Step	Action
31.	Enter the appropriate information into the **Telephone** field. For this example, type **6784041234**.

Step	Action
32.	Click the **Save** button.
33.	Click the **Vertical** scrollbar.

Step	Action
34.	Click the **Procurement Security** tab.

Step	Action
35.	Click the **eProcurement** arrow.
	▶ **eProcurement**
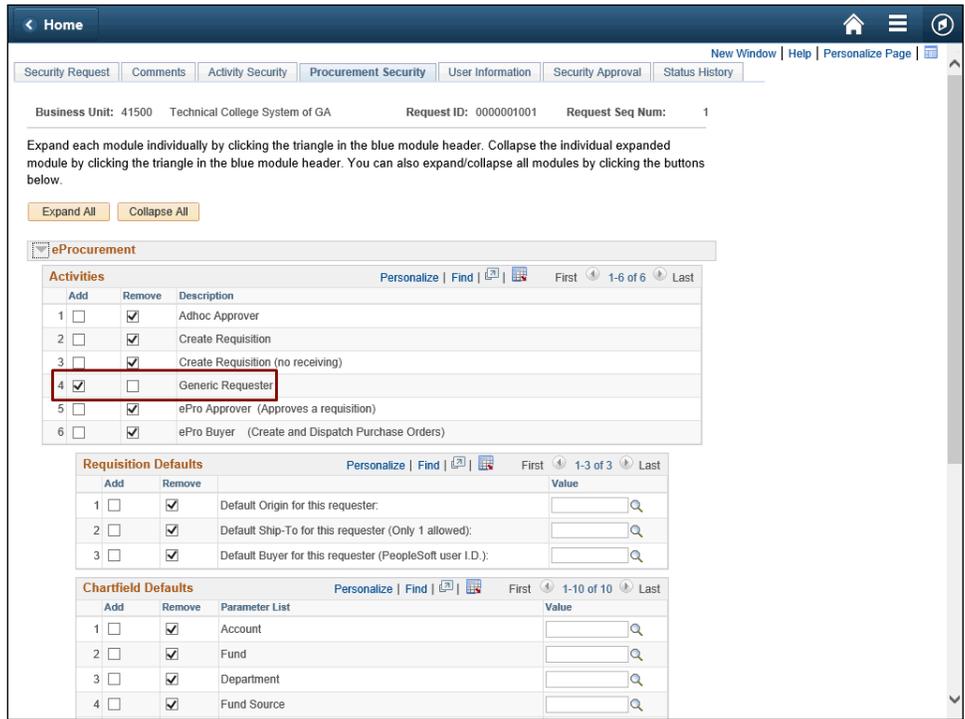
Step	Action
36.	On the **eProcurement** tab, the *Generic Requester* add checkbox will already be checked.

Step	Action
37.	The *Requisition Defaults* information is required.
	The *Chartfield Defaults* information is not required but optional. For this example, this information will not be entered.

Step	Action
38.	Click in the **Value** field.

Step	Action
39.	Enter the appropriate information into the **Value** field. For this example, type **TRV**.

Step	Action
40.	Click in the **Value** field.

Step	Action
41.	Enter the appropriate information into the field. For this example, type **PO_011001**.

Step	Action
42.	Click in the **Value** field.

Step	Action
43.	Enter the appropriate information into the **Value** field. For this example, type **GRAVE555**.

Step	Action
44.	More information is needed under the **User Information** tab. Click the **User Information** tab. ![User Information button]

Step	Action
45.	The *Default Ship To Address* and *Default Location* sections are required fields on this page.

Step	Action
46.	Click in the **Ship To** field.

Step	Action
47.	Enter the appropriate information into the **Ship To** field.

For this example, type **PO_011001**. |

Step	Action
48.	Click in the **Location Code** field.

Location Code: [   ] 🔍 |

Step	Action
49.	Enter the appropriate information into the **Location Code** field. For this example, type **001ADM507**.

Step	Action
50.	Click in the **Value** field.

Step	Action
51.	Enter the appropriate information into the **Value** field. For this example, type **TRV**.
52.	Click the **Vertical** scrollbar.

Step	Action
53.	Review the information. Click the **Save** button.

Step	Action
54.	When the Generic Requester ID is completed by the manager, the manager will change the Status field from Draft to Manager Submitted. This will send an email to the Agency Security Officer and inform them that they have a Security Request to review and approve before it is sent to Pending Approval Status for DOAS to approve. After DOAS approves the Generic Requester ID or any TGM activity, an email is sent to SAO Security and they can now process the security request. When the security request is processed and completed, the Agency Security Officer will receive an email that the request is complete.

Step	Action
55.	Click **here** (https://www.surveymonkey.com/r/25KG2HH) to take a quick survey.

Thank you!