



**University of Maine System**

**PeopleSoft Financials 8.4**

**Manage Employee Access**

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## 1. Overview

University of Maine System (UMS) employees who use the PeopleSoft Financials system must have security settings applied to their PeopleSoft user profile in order to access the PeopleSoft components necessary for their work. The **Manage Employee Access** system enables authorized employees (Security Administrators) on each campus to assign roles, set User Preferences and determine what information employees have access to in the PeopleSoft Financial system.

## 2. Employee Access to Financials

Security Administrators should make certain employees can link to the Financials system via the **Enterprise Portal** page (Enterprise Applications > Financials). If the link to Financials is not available on an employee's Portal page or if you have any questions about the Financials security system, please contact the UMS PeopleSoft Security System Administrator, McLean Poulin (phone: 561-3325; email mpoulin@maine.edu).

## 3. Setting Security for Non-Employees

Non-employees are not entered into the UMS Human Resources system or assigned a User ID. Therefore, special steps need to be taken to assign them a User ID so you can then grant them access to Financials and manage their security settings. In the case of a non-employee, send the following information to the PeopleSoft Security System Administrator, McLean Poulin (see above for contact info): First name, last name, Business Unit and default Department. You will be notified when a User ID has been assigned and access to the Financials system has been granted.


## 2. Access Security System

From your PeopleSoft Financials menu:


***University of Maine System > Security > Manage Employee Access***

The home page for the **Manage Employee Access** page will open:

### MANAGE EMPLOYEE ACCESS



This link will allow you to view a user's access. You can view any employee, not just the ones you are authorized to manage. Click on the icon to the left to view the an employee access.



This will allow you to manage roles for an employee. You can also attach any route controls to the role that will be used in your Financial System workflow applications. Below are the roles you are authorized to manage. Click on the role link below to add or remove employees.


[Campus Accounting](#)

[Journal Entry - Actual/Budget](#)

[GL Speedtype Authorization](#)


[Additional sources to view](#)

[UMS GL Inquiry Tool](#)




The links below take you to pages needed for AP/PO user setup. You will need to use User Preferences for all the roles and Requestor Setup and Buyer Setup for all requisitioners.

[User Preferences](#)                      [Buyer Setup](#)                      [Requestor Setup](#)



Use the Dept User Security link below to determine what Department security is used for access to the Requisition Search Page, Purchase Order Search Page, Standing Order Pages, and Receiving Search Page. BU User Security is used to define Business Unit access when creating journal entries. Ledger User Security is used for access to specific ledgers (ACTUALS, BUDGET, BASEBUD, FUTBUD) when creating journal entries. Click on a link below to establish your security.


[Dept User Security](#)                      [BU User Security](#)                      [Ledger User Security](#)




Use this option to establish GL report security groupings for the employee. Click on the icon to the left to launch the Report Security Groupings page.

The Links listed here depend on what roles you are authorized to assign.

### 3. View User Profile


The **User Profile** section of the **Manage Employee Access** page enables you to compile a listing of all roles currently assigned to an employee. Prior to adding/removing a role to an employee's profile, it will help to run this process to verify what role/s, if any, the employee is already assigned. To do so, select the User Profile icon . The **User Access** page will open:

#### User Access



Once you have selected the user, click on the query hyperlink. This will display all the access the employee currently is assigned.

**Enter User Id and then tab out of field before selecting an option.**

User ID:  

[User ID's Roles](#)  
(To which Roles does this User ID belong?)



[Return To Manage Role Distribution](#)

Look up or enter the employee's User ID (7-digit Employee ID).

[User ID's Roles](#)  
(To which Roles does this User ID belong?)


After you enter the employee's User ID, select the [User ID's Roles](#) link to open a page that lists all roles currently assigned to the employee:

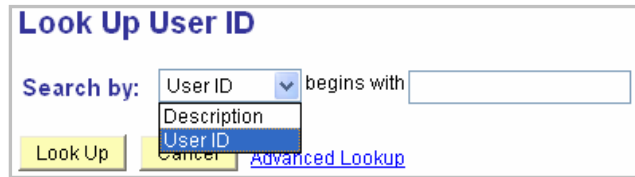
Download results in : [Excel Spreadsheet](#) [CSV Text File](#) (1 kb)

View All First  1-2 of 2  Last

	Role
1	R_PEOPLESOFT_USER
2	R_TRANSLATE

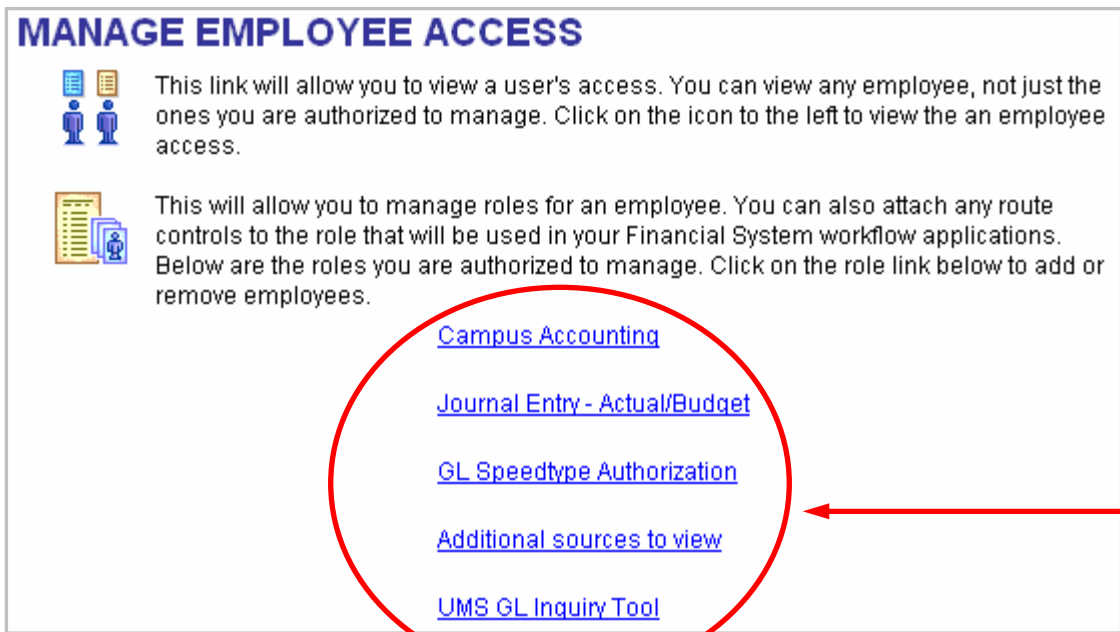
Download results in Excel or text format, if you wish.

**Note:** When you click the look up icon  , the **Look Up User ID** page will open. You can search for an employee according to User ID (7-digit Employee ID) or Description (employee's **first** name). To search according to last name, enter % followed by employee's last name followed by % in search field (e.g. %Jones%).





### 4. Manage Employee Roles

The roles you are authorized to manage are listed in the **Employee Roles** section of the **Manage Employee Access** page.



**MANAGE EMPLOYEE ACCESS**

 This link will allow you to view a user's access. You can view any employee, not just the ones you are authorized to manage. Click on the icon to the left to view the an employee access.

 This will allow you to manage roles for an employee. You can also attach any route controls to the role that will be used in your Financial System workflow applications. Below are the roles you are authorized to manage. Click on the role link below to add or remove employees.


- [Campus Accounting](#)
- [Journal Entry - Actual/Budget](#)
- [GL Speedtype Authorization](#)
- [Additional sources to view](#)
- [UMS GL Inquiry Tool](#)

Once an employee is assigned a role, an application will run that will add or remove the role from the employee's profile. This application runs from 8am – 5pm, Monday – Friday. Once a role is added or removed from the employee's profile, an email will be sent to the employee notifying them of the action.

## Assign/Remove a Role

You are now ready to adjust the role/s on the employee's profile.


**Note:** The following steps apply to the management of all roles within the PeopleSoft Financials system.

 This will allow you to manage roles for an employee. You can also attach any route controls to the role that will be used in your Financial System workflow applications. Below are the roles you are authorized to manage. Click on the role link below to add or remove employees.

[Campus Accounting](#)  
[Journal Entry - Actual/Budget](#)  
[GL Speedtype Authorization](#)  
[Additional sources to view](#)  
[UMS GL Inquiry Tool](#)

Select the link to role you need to add/remove.

### Employee Role Authorization

 This page is where you will manage the employees in the roles you are authorized to manage. Once you have reviewed you want to save your information, click on the link Save and Return. If you wish to cancel your updates, click on the link Cancel and Return. Any modifications to the roles will be updated to the employees security on the top of every hour from 8am to 5pm, Monday - Friday.

Journal Entry - Actual/Budget

The Employee IDs and names of all employees currently assigned the role are listed.

Employee's Authorized In Role			
		Customize	Find
		View 100	First
		1-10 of 190	
		Last	
EmpID		Remove From Role	
1	9000005	Gunn, Ann	<input type="checkbox"/> <span style="float: right;">+</span>
2	9000004	Good, Johnny B.	<input type="checkbox"/> <span style="float: right;">+</span>

## Add Role to Employee Profile

Before you can add a role to the employee's profile you need to add a row on the **Employee Role Authorization** page. Do so by clicking the + button in an existing row.

Employee's Authorized In Role			
	EmpID		
1	19000005	Gunn, Ann	
2	19000004	Johnny B. Good	<input type="checkbox"/>
3	9000006		<input type="checkbox"/>

In the blank EmpID field of the new row, enter or look up the employee's 7-digit Employee ID.

Employee's Authorized In Role			
	EmpID		Remove From Role
1	19000005	Gunn, Ann	<input type="checkbox"/>
2	19000004	Good, Johnny B.	<input type="checkbox"/>
3	9000006	Brown, Roger	<input type="checkbox"/>

Select the Tab key on your keyboard to complete the entry.

Select the [Save and Return to Manage Role Distribution](#) link at the bottom of the **Employee Role Authorization** page to save the entry and leave page. This action will trigger the application to add the role to the employee's profile the next time it runs the process.

If you are authorized to assign/remove the "Reviewer1," "Reviewer 2" and "Final Approver" roles, please refer to the **Setting Up Workflow** guide for information about assigning Route Control Profiles.

### Remove Role from Employee Profile

To remove a role from an employee's profile, place a checkmark in the **Remove From Role** checkbox adjacent to the employee's name.

Employee's Authorized In Role			
	EmpID		Remove From Role
1	19000005	Gunn, Ann	<input type="checkbox"/>
2	19000004	Good, Johnny B.	<input type="checkbox"/>
3	9000006	Brown, Roger	<input checked="" type="checkbox"/>

Next, select the [Save and Return to Manage Role Distribution](#) link at the bottom of the **Employee Role Authorization** page to save the entry and leave page. This action will trigger the application to remove the role from the employee's profile the next time it runs the process.

## 4. User Preferences


There are three sections to the **User Preferences** section of the **Manage Employee Access** page, they are:

**User Preferences** – This is where you set defaults for the pages an employee will access in PeopleSoft Financials (e.g. journal entries, purchase orders, requisitions...). For example, for employees enter by default on the journal entry header page.

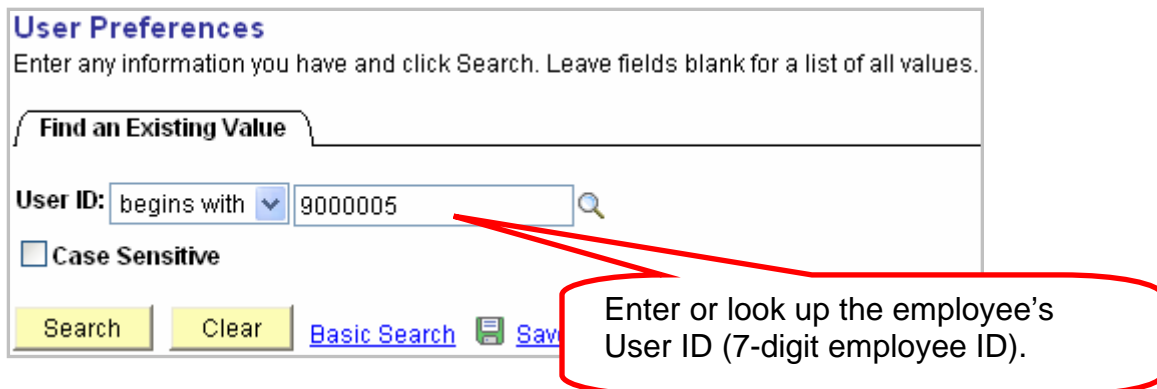
**Buyer Setup** – This is where you will set an employee’s defaults for the Buyer Table.

**Requester Setup** – This is where you will set an employee’s defaults for the Requisitions they create

### User Preferences

To access the pages where you will set an employee’s PeopleSoft Financials user preferences, from the **Manage Employee Access** page select the User Preferences icon .

The **Find an Existing Value** page will open:

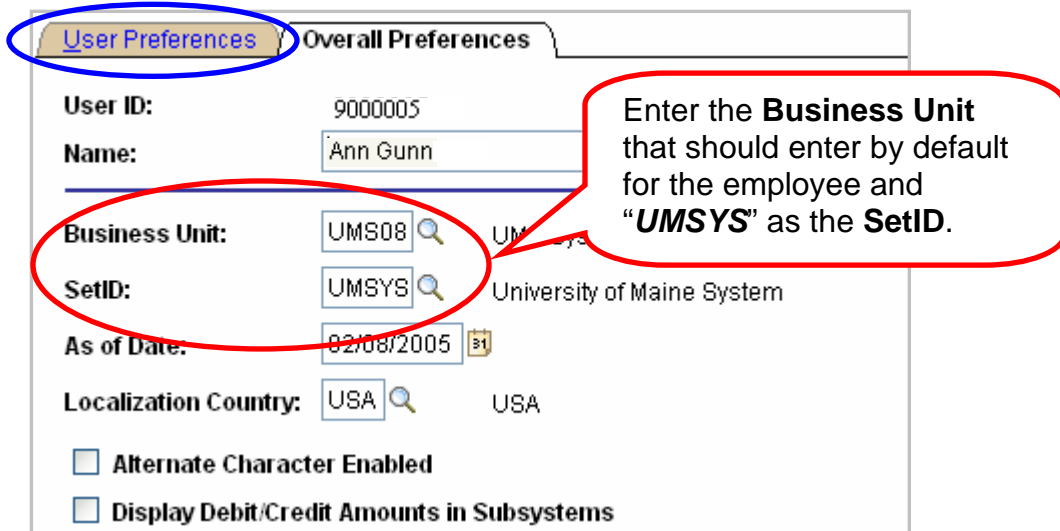


The **User Preferences** page will open:



**Set Overall User Preferences**

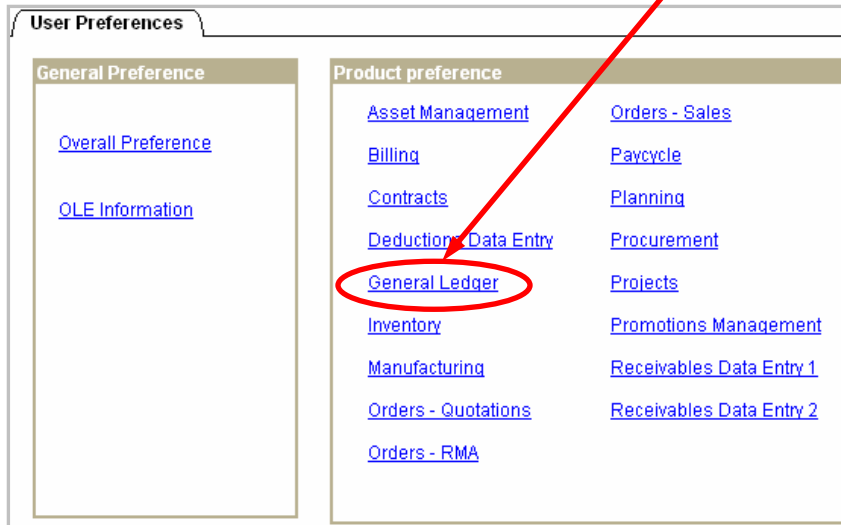
To set an employee's default Business Unit and Set ID, select the [Overall Preference](#) link on the **User Preference** page. The **Overall Preference** page will open:



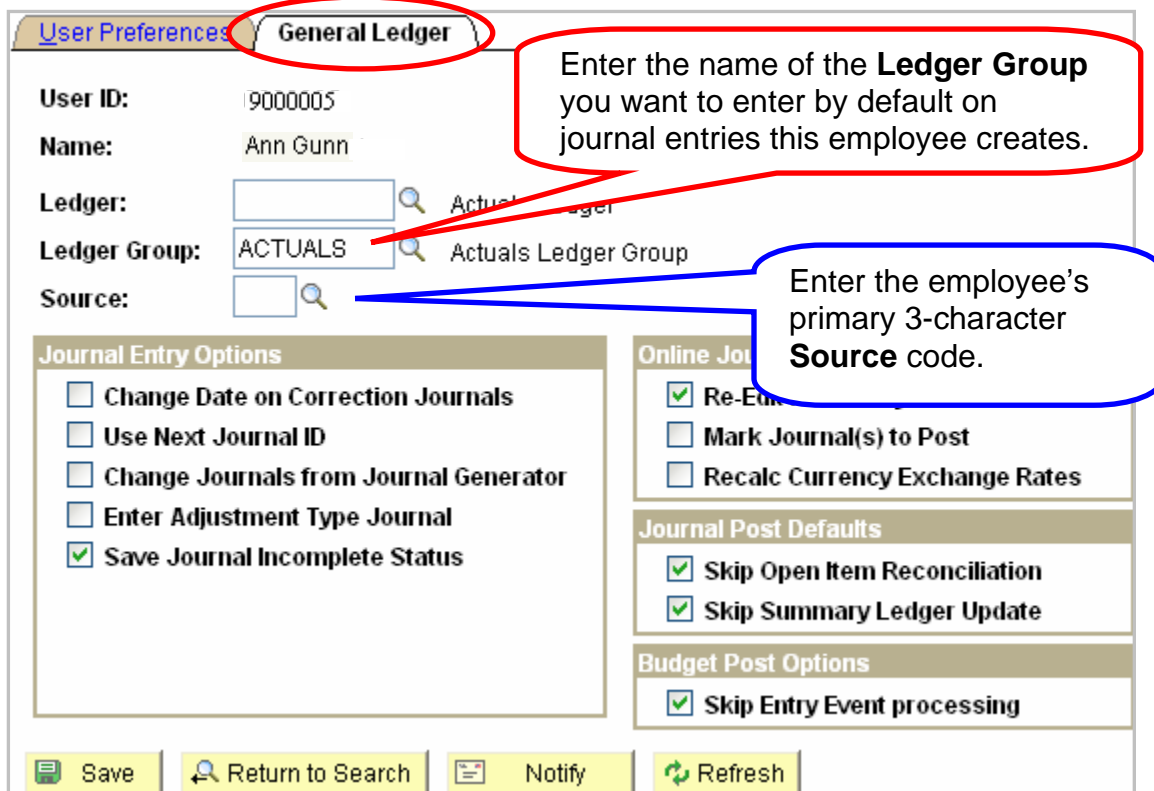
Select the **User Preferences** tab to return to **User Preferences** page.

### Set General Ledger User Preferences

The user preferences you set on the **General Ledger** page primarily affect journal entry defaults. To set the information that will appear by default on the journal entries an employee will create, select the **General Ledger** link.



The **General Ledger** page opens:



Depending on settings applied for the employee under **Ledger User Security** (see page 30), the employee will most likely be able to look up and enter different ledgers on the journal entries they create. The ledger name you enter here will appear by default on the journal entries the employee creates. The same is true for the Source. The employee will be able to look up and enter different Sources on their journal entries, but the Source code you enter here will appear on the Header page by default.

Place a checkmark in the following boxes on the **General Ledger** page:

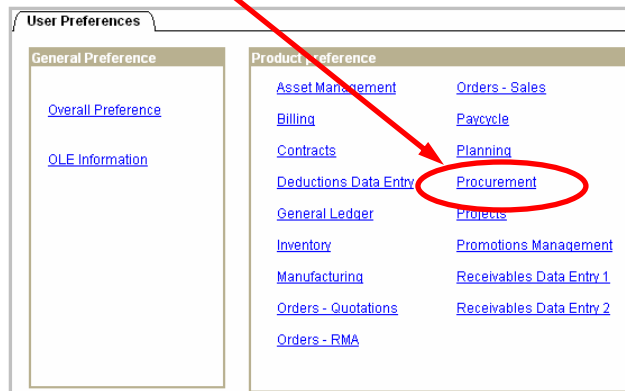
- Save Journal Incomplete Status
- Re-Edit Previously Edited
- Skip Open Item Reconciliation
- Skip Summary Ledger Update
- Skip Entry Event Processing

<p><b>Journal Entry Options</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Change Date on Correction Journals</li> <li><input type="checkbox"/> Use Next Journal ID</li> <li><input type="checkbox"/> Change Journals from Journal Generator</li> <li><input type="checkbox"/> Enter Adjustment Type Journal</li> <li><input checked="" type="checkbox"/> Save Journal Incomplete Status</li> </ul>	<p><b>Online Journal Edit Defaults</b></p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Re-Edit Previously Edited</li> <li><input type="checkbox"/> Mark Journal(s) to Post</li> <li><input type="checkbox"/> Recalc Currency Exchange Rates</li> </ul> <p><b>Journal Post Defaults</b></p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Skip Open Item Reconciliation</li> <li><input checked="" type="checkbox"/> Skip Summary Ledger Update</li> </ul> <p><b>Budget Post Options</b></p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Skip Entry Event processing</li> </ul>
--	---

Click  when finished, then click **User Preferences** tab to return to **User Preferences** page.

**Set Procurement User Preferences**

The Procurement user preferences you set primarily affect employees assigned the following roles: Requisitioners, Receivers and Accounts Payables. To set the preferences, select the **Procurement** link on the **User Preferences** page.



The screenshot shows the 'User Preferences' page with two main sections: 'General Preference' and 'Product Preference'. The 'Product Preference' section contains a list of links including 'Asset Management', 'Billing', 'Contracts', 'Deductions Data Entry', 'General Ledger', 'Inventory', 'Manufacturing', 'Orders - Quotations', 'Orders - RMA', 'Orders - Sales', 'Paycycle', 'Planning', 'Procurement', 'Protects', 'Promotions Management', 'Receivables Data Entry 1', and 'Receivables Data Entry 2'. The 'Procurement' link is circled in red, and a red arrow points to it from the text above.

The **Procurement** page will open:

**User Preferences** | **Procurement**

User: 9000005 Ann Gunn

Location:

Origin:

Department:

Ship To Location:

**Requester:** 9000005

Billing Location:

[Contract Process](#) [Request for Quote Process](#) [Payables Online Vouchering](#) [Receiver Setup](#)  
[Requisition Authorizations](#) [Purchase Order Authorizations](#) [Vendor Processing Authority](#) [Doc Tolerance Authorizations](#)

Save Return to Search Notify Refresh

**User Preferences** | **Procurement**

User: 9000005 Ann Gunn

**Location:**

Origin:

Department:

**Ship To Location:**

Requester:

**Billing Location:**

[Contract Process](#) [Request for Quote Process](#) [Payables Online Vouchering](#) [Receiver Setup](#)  
[Requisition Authorizations](#) [Purchase Order Authorizations](#) [Vendor Processing Authority](#) [Doc Tolerance Authorizations](#)

Save Return to Search Notify Refresh

**User Preferences**   **Procurement**

User: 9000005   Ann Gunn

Location:

Origin:

**Department:**    **Entering a specific *Department* is optional.**

Ship To Location:

Requester:

Billing Location:

[Contract Process](#)   [Request for Quote Process](#)   [Payables Online Vouchering](#)   [Receiver Setup](#)  
[Requisition Authorizations](#)   [Purchase Order Authorizations](#)   [Vendor Processing Authority](#)   [Doc Tolerance Authorizations](#)

Save   Return to Search   Notify   Refresh

**Requisitioner Preferences**

To set the information that will appear by default on the Requisitions an employee will create, select the [Requisition Authorization](#) link.

**User Preferences**   **Procurement**

User: 9000005   Ann Gunn

Location:

Origin:

Department:

Ship To Location:

Requester:

Billing Location:

[Contract Process](#)   [Request for Quote Process](#)   [Payables Online Vouchering](#)   [Receiver Setup](#)  
[Requisition Authorizations](#)   [Purchase Order Authorizations](#)   [Vendor Processing Authority](#)   [Doc Tolerance Authorizations](#)

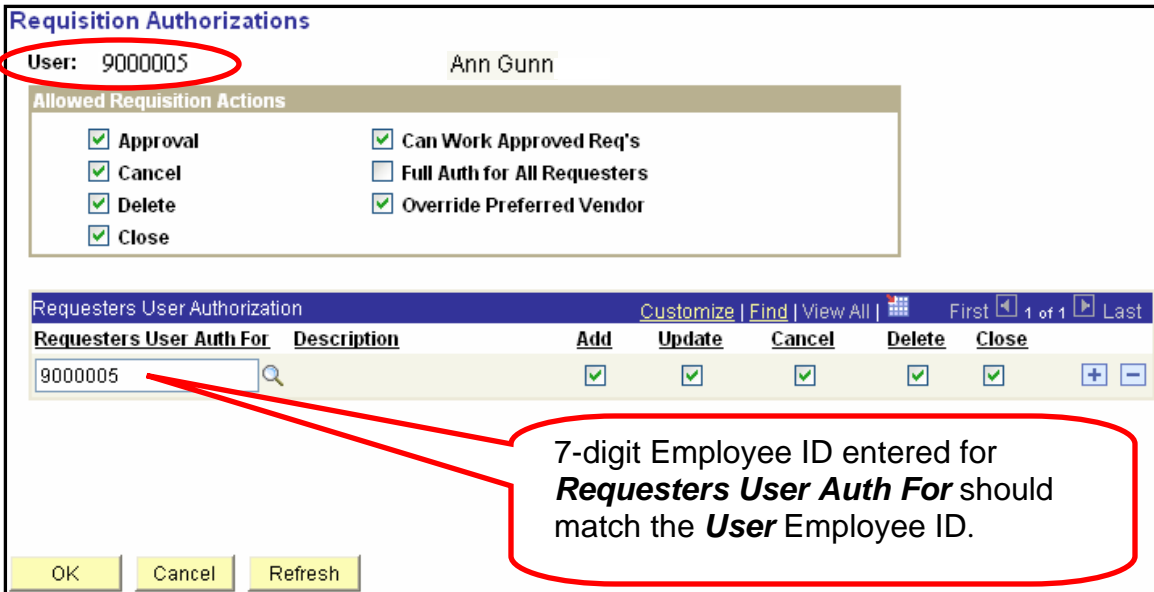
Save   Return to Search   Notify   Refresh


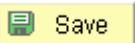
Place a checkmark in the following boxes on the **Requisition Authorizations** page in the **Allowed Requisition Actions** section:

- Approval
- Cancel
- Delete
- Close
- Can Work Approved Req's
- Override Preferred Vendor

And place a checkmark in the following boxes in the **Requestors User Authorization** section:

- Add
- Update
- Cancel
- Delete
- Close



When finished, select  . You will return to the **Procurement** page where you should select  to save your settings.

### Receiver Preferences

To set user preferences for an employee assigned the **Receiver** role, select the [Receiver Setup](#) link.

User: 9000005 Ann Gunn

Location: [ ]

Origin: [ ]

Department: [ ]

Ship To Location: [ ]

Requester: [ ]

Billing Location: [ ]

[Contract Process](#) [Request for Quote Process](#) [Payables Online Vouchering](#) [Receiver Setup](#)

[Requisition Authorizations](#) [Purchase Order Authorizations](#) [Vendor Processing Authority](#) [Doc Tolerance Authorizations](#)

Save Return to Search Notify Refresh

In the **Unit** section of the **Receiver Setup** page, enter “**UMS08**” for the **Receiving Business Unit** and “**999**” for **Days +/-**.

Receiver Setup

User: 90000057 Ann Gunn

Unit

Interface Receipt

Blind Receiving Only  No Order Qty  Ordered Qty  PO Remaining Qty

Receiving Business Unit: UMS08 UMS System-Wide Services

Days +/- Today: 999

OK Cancel Refresh

On the **Receiver Setup** page, select following radio button:

PO Remaining Qty

When finished, select  . You will return to the **Receiver Setup** page where you should select  to save your settings.

## Buyer Setup

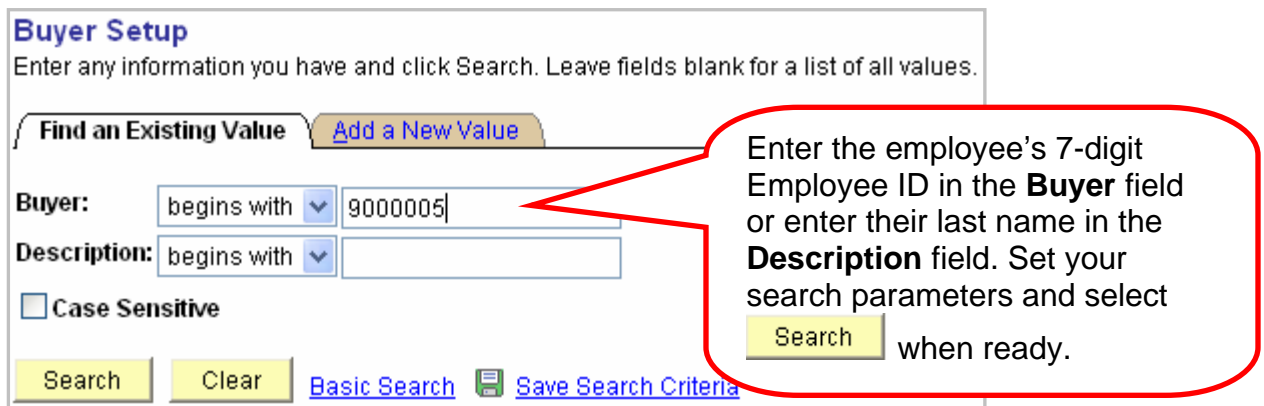
The following defaults must be set for all Requisitioners. To access the page where you will set an employee's defaults for the "Buyer Table," from the **Manage Employee Access** page, select the [Buyer Setup](#) link.



The links below take you to pages needed for AP/PO user setup. You will need to use User Preferences for all the roles and Requestor Setup and Buyer Setup for all requisitioners.

[User Preferences](#)      [Buyer Setup](#)      [Requestor Setup](#)

The **Find an Existing Value** page will open



**Buyer Setup**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

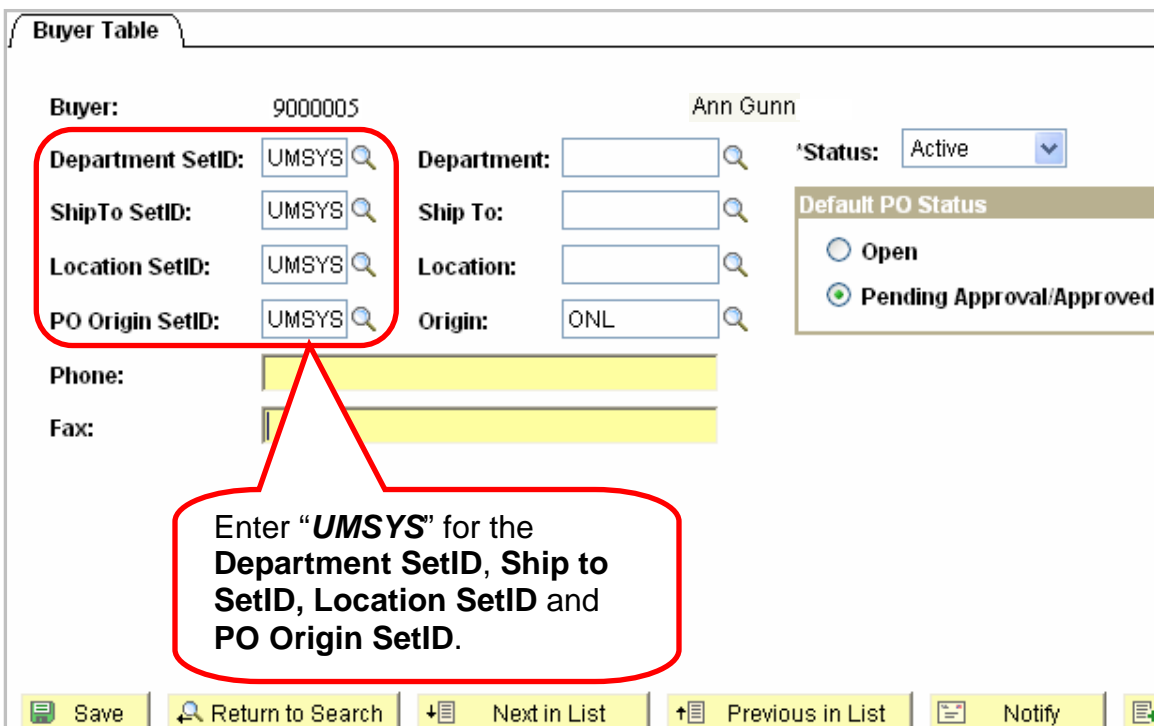
**Find an Existing Value**    [Add a New Value](#)

**Buyer:** begins with     **Description:** begins with

Case Sensitive

       [Basic Search](#)    [Save Search Criteria](#)

The **Buyer Table** page opens



**Buyer Table**

**Buyer:** 9000005    **Ann Gunn**    **Status:** Active

**Department SetID:** UMSYS    **Department:**    **Default PO Status:**  
 Open  
 Pending Approval/Approved

**Ship To SetID:** UMSYS    **Ship To:**    **PO Origin SetID:** UMSYS    **Origin:** ONL

**Location SetID:** UMSYS    **Location:**    **Phone:**    **Fax:**

**Buyer Table**

Buyer: 9000005 Ann Gunn

Department SetID: UMSYS Department: \*Status: Active

ShipTo SetID: UMSYS Ship To:

Location SetID: UMSYS Location:

PO Origin SetID: UMSYS Origin: ONL

Phone:

Fax:

Default PO Status

Open

Pending Approval/Approved

Save Return to Search Next in List Previous in List Notify

Enter "ONL" as the Origin.

Enter the default Phone and Fax numbers (include Area Code).

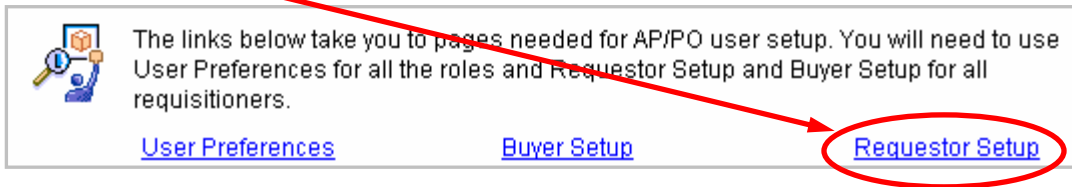
Select the Pending Approval/Approved radio button.

Save

Select Save when finished to save your settings.

## Requester Setup

To access the page where you will set an employee's defaults for the Requisitions they create, from the **Manage Employee Access** page select the [Requester Setup](#) link.



The links below take you to pages needed for AP/PO user setup. You will need to use User Preferences for all the roles and Requestor Setup and Buyer Setup for all requisitioners.

[User Preferences](#)      [Buyer Setup](#)      [Requestor Setup](#)

The **Find an Existing Value** page will open:



**Requester Setup**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**    [Add a New Value](#)

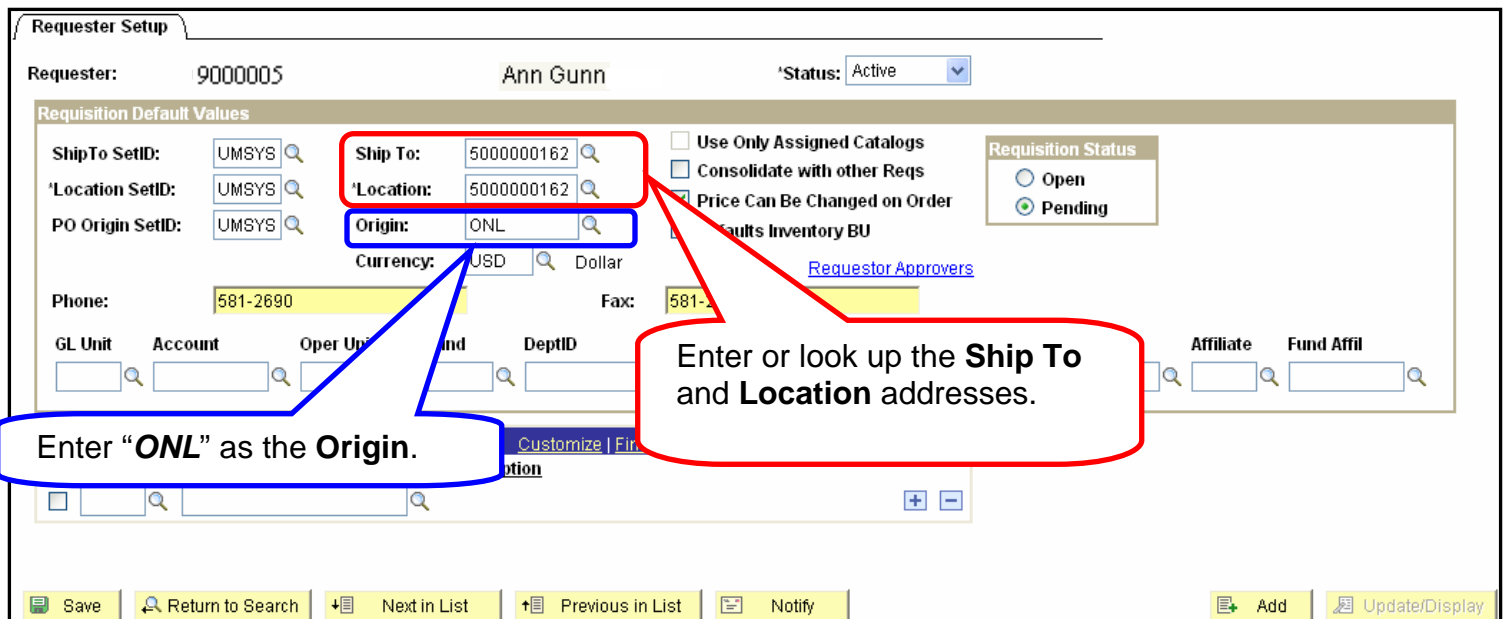
**Requester:** begins with   
**Description:** begins with

Case Sensitive

       [Basic Search](#)    [Save Search Criteria](#)

Enter the employee's 7-digit Employee ID in the **Requester** field or enter their last name in the **Description** field. Select **Search** when ready.

The **Requester Setup** page opens:



**Requester Setup**

**Requester:** 9000005    **Ann Gunn**    \***Status:** Active

**Requisition Default Values**

**Ship To SetID:** UMSYS    **Ship To:** 5000000162     Use Only Assigned Catalogs  
**'Location SetID:** UMSYS    **'Location:** 5000000162     Consolidate with other Reqs  
**PO Origin SetID:** UMSYS    **Origin:** ONL     Price Can Be Changed on Order  
Currency: USD    Dollar     Defaults Inventory BU

**Requisition Status**  
 Open  
 Pending

**Requester Approvers**

**Phone:** 581-2690    **Fax:** 581-...

**GL Unit**    **Account**    **Oper Unit**    **DeptID**    **Affiliate**    **Fund Affil**

Enter "ONL" as the Origin.

Enter or look up the **Ship To** and **Location** addresses.

**Requester Setup**

Requester: 9000005      Ann Gunn      \*Status: Active

**Requisition Default Values**

Ship To SetID: UMSYS      Ship To:       Use Only Assigned Catalogs  
\*Location SetID: UMSYS      \*Location:       Consolidate with other Reqs  
PO Origin SetID: UMSYS      Origin:       Price Can Be Changed on Order  
Currency:       Defaults Inventory BU

Requisition Status  
 Open  
 Pending

Phone:      Fax:

GL Unit	Account	Oper Unit	Fund	DeptID	Program	Class	Bud Ref	Project	Affiliate	Fund Affil
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Catalog Information**

*SetID	*Catalog ID	Description
<input type="text"/>	<input type="text"/>	<input type="text"/>

Save      Notify      Add      Update/Display

Enter the Phone and Fax numbers that should enter by default.

**Requester Setup**

Requester: 9000005      Ann Gunn      \*Status: Active

**Requisition Default Values**

Use Only Assigned Catalogs  
 Consolidate with other Reqs  
 Price Can Be Changed on Order  
 Defaults Inventory BU

Requisition Status  
 Open  
 Pending

Phone:      Fax:

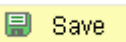
GL Unit	Account	Oper Unit	Fund	DeptID	Program	Class	Bud Ref	Project	Affiliate	Fund Affil
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Catalog Information**

*SetID	*Catalog ID	Description
<input type="text"/>	<input type="text"/>	<input type="text"/>

Save      Notify      Add      Update/Display

Enter whatever, if any, ChartField values should enter by default.

Select  when finished to save your settings.

## 5. Security Options



The **Security Options** section of the **Manage Employee Access** system is comprised of three main sections, they are:

**Dept User Security** – This is where you will set Department security for an employee’s access to Requisitions, Purchase Orders, Standing Orders, and Receiving Pages.

**BU User Security** – This is where you will define Business Unit access when creating journal entries.

**Ledger User Security** – This is where you will determine an employee’s access to specific ledgers (ACTUALS, BUDGET, BASEBUD, FUTBUD) when creating journal entries.


### Department User Security

The **Dept User Security** section only applies to the *Accounts Payable* and *Purchasing* systems of PeopleSoft Financials. It is used to determine what departments and/or specific department values employees can access and enter data for on Requisitions, Purchase Orders, Standing Orders and Receiving.

To set an employee’s Department level security, from the **Security Options** section, select the [Dept User Security](#) link.

The **Department Security By User ID** page will open:

When ready, select . The **Operator Dept. Level Security** page will open:

To begin, you will select node/s on the Department tree to determine an employee's departmental security. If you want an employee to only access a specific value within a Department node, after you select the node you can then select the specific value/s. Click on the look up tree icon  to begin:



**Operator Dept. Level Security**

 This page is where you will select what type of department level security you want to grant access for the employee. You can select the Tree Node level, which will allow the employee to view all departments under the node or a specific department.

9000005 Ann Gunn

**Department Operator Security** Find | View All First 1 of 1 Last

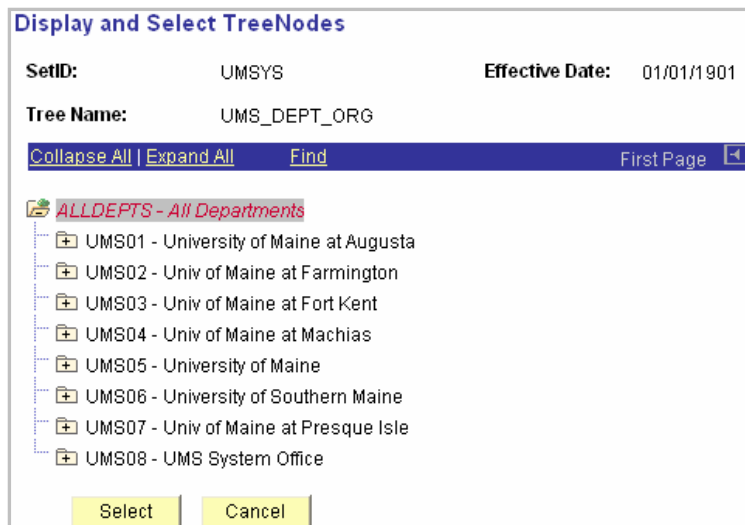
**Department**   

**Specific Departments**

[Return To Manage Role Distribution](#)

The **Display and Select TreeNodes** page for UMS Department tree will open:












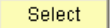
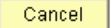
**Display and Select TreeNodes**

**SetID:** UMSYS **Effective Date:** 01/01/1901

**Tree Name:** UMS\_DEPT\_ORG

[Collapse All](#) | [Expand All](#) Find First Page

-  **ALLDEPTS - All Departments**
  -  UMS01 - University of Maine at Augusta
  -  UMS02 - Univ of Maine at Farmington
  -  UMS03 - Univ of Maine at Fort Kent
  -  UMS04 - Univ of Maine at Machias
  -  UMS05 - University of Maine
  -  UMS06 - University of Southern Maine
  -  UMS07 - Univ of Maine at Presque Isle
  -  UMS08 - UMS System Office

The **Display and Select Tree Node** page opens:

**Display and Select TreeNodes**


SetID: UMSYS  
Tree Name: UMS\_DEPT\_ORG


**ALLDEPTS > UMS06**

[Collapse All](#) | [Expand All](#) | [Find](#)

- ALLDEPTS - All Departments
  - UMS01 - University of Maine at Augusta
  - UMS02 - Univ of Maine at Farmington
  - UMS03 - Univ of Maine at Fort Kent
  - UMS04 - Univ of Maine at Machias
  - UMS05 - University of Maine
  - UMS06 - University of Southern Maine**
  - UMS07 - Univ of Maine at Presque Isle
  - UMS08 - UMS System Office

In this example, top level nodes for each Business Unit's **Department** tree initially appear under the "ALLDEPTS" node

Click on the Expand Node icon  to the left of the Business Unit Department.

The top level tree nodes for the Department tree appear. Click on the Expand Node icon  to the left of the relevant top level node.

**Display and Select TreeNodes**

SetID: UMSYS Effective  
Tree Name: UMS\_DEPT\_ORG

**ALLDEPTS > UMS06**

[Collapse All](#) | [Expand All](#) | [Find](#)

- ALLDEPTS - All Departments
  - UMS01 - University of Maine at Augusta
  - UMS02 - Univ of Maine at Farmington
  - UMS03 - Univ of Maine at Fort Kent
  - UMS04 - Univ of Maine at Machias
  - UMS05 - University of Maine
  - UMS06 - University of Southern Maine**
    - 6SYSTEM\_LEVEL\_3 - System Level 3
    - 6PRES\_OFFICE - President's Office
    - 6PROVOST - Provost Admin
    - 6CFO\_LVL3 - Chief Financial Officer Lvl 3
    - 6VP\_ENROLL\_MGMT\_LV4 - VP Enroll Mgmt Level 3
    - 6CHIEF\_INFO\_OFFICER - Chief Information Officer
  - UMS07 - Univ of Maine at Presque Isle
  - UMS08 - UMS System Office

**Display and Select TreeNodes**

SetID: UMSYS

Tree Name: UMS\_DEPT\_ORG

[ALLDEPTS](#) > [UMS06](#) > [6VP\\_ENROLL\\_MGMT\\_LV4](#)

[Collapse All](#) | [Expand All](#) | [Find](#)

System displays path to the currently selected node. These are clickable links that when selected, return you to the linked node.

- UMS06 - University of Southern Maine
  - 6SYSTEM\_LEVEL\_3 - System Level 3
  - 6PRES\_OFFICE - President's Office
  - 6PROVOST - Provost Admin
  - 6CFO\_LVL3 - Chief Financial Officer Lvl 3
  - 6VP\_ENROLL\_MGMT\_LV4 - VP Enroll Mgmt L
    - 6VP\_ENROLL\_MGMT - VP Enroll Mgmt
    - 6ADMISSIONS - Admissions
    - 6REGISTRAR - Registrar
    - 6SIRS - SIRS
    - 6FIN\_AID - Financial Aid** [6804000 - 6804999]
    - 6ADV\_ACADEM - Advising & Academic
    - 6SVS\_OFF - Services Offices
    - 6COMM\_PROF\_EDUC - Comm & Prof Educ
    - 6CONT\_ED - Ctr Cont Ed
    - 6CONF - Conference
    - 6INST\_FAM\_OWNER - Inst Family Owned
    - 6LIFELINE - Lifeline
    - 6STONE\_HOUSE - Stone House
    - 6DIR\_EAP - Director Eap
    - 6INTL\_PROG - Int'l Programs
    - 6SUM\_ADMIN - Summer Admin
    - 6WIN\_SES - Winter Session
  - 6CHIEF\_INFO\_OFFICER - Chief Information Officer
- UMS07 - Univ of Maine at Presque Isle
- UMS08 - UMS System Office

[Collapse All](#) | [Expand All](#) | [Find](#)

Continue selecting nodes until you reach the one that applies to the security setting you wish to apply. When ready, click on the node to highlight it and choose .

In this example, the range of Departments under the selected node appears.

## Find Value

The **Find Value** feature helps you quickly locate and select a specific node on a tree. For example, if you want select a node that a specific value exists within but are not certain where the node exists on the tree, you can enter the value or its description in the **Find Detail Value** section on the **Find Value** page and be taken directly to the node.

To access the **Find Value** feature, select the **Find** link located on the **Display and Select TreeNodes** page.

The **Find Value** page opens.

Enter or look up the tree node name or its description in the **Find Tree Node** section.

Or...

Enter name of the ChartField code or its description in the **Find Detail Value** section.

**Exact Matching** is checked by default on the **Find Value** page. Uncheck the box to remove that restriction.

Check **Case Sensitive Search** box to set that restriction.


When you select **Find** on the **Find Value** page, you will navigate directly to the location on the tree that matches the set parameters.

The screenshot shows a tree view with a search result "[6804000 - 6804999]" highlighted in red. A blue callout box points to this result with the text: "Click on the Node to highlight it and then click on **Select**". At the bottom of the tree view, the "Select" button is circled in blue.

When you select **Find** on the **Find Value** page, you will navigate directly to the location on the Tree that matches the set parameters.

The screenshot shows the same tree view as above. A red callout box highlights the breadcrumb path at the top: "ALLDEPTS > UMS06 > 6VP\_ENROLL\_MGMT\_LV4 > 6FIN\_AID > Detail". A red callout box points to this path with the text: "The path to the Tree Node that resulted from your **Find Value** search also appears at the top of the **Display and Select TreeNode** page. You can click on any of the links to navigate directly to the node." At the bottom, the "Select" button is circled in blue.


### Operator Dept. Level Security


 This page is where you will select what type of department level security you want to grant access for the employee. You can select the Tree Node level, which will allow the employee to view all departments under the node or a specific department.

9000005      Ann Gunn

**Department Operator Security**      Find | View All      First 1 of 1 Last



#### Department


	6FIN_AID	Financial Aid
---	----------	---------------

 **Specific Departments**

[Return To Manage Role Distribution](#)

Select the  button to add another Department node to the employee's Department Security profile or select the  button to delete a node.

After selecting a Department node, you can then limit the employee's access to a specific value within the node. To do so, click on the Look up detail value  icon.

#### Department Operator Security


### Department

	6FIN_AID	Financial Aid
---	----------	---------------

 **Specific Departments**

The **Security Oprid Dept. Detail** page opens. Select the look up icon to view all Specific Department values within the node.

#### Department

1	<input type="text"/>	
---	----------------------	---

[Return To Operator Dept. Level Security](#)

Department Description	
<a href="#">6804000</a>	Financial Aid
<a href="#">6804001</a>	Scholarships University
<a href="#">6804002</a>	Supp Financial Aid
<a href="#">6804003</a>	University Student Aid
<a href="#">6804004</a>	College Wk Stdy
<a href="#">6804005</a>	NDSL Match
<a href="#">6804006</a>	Interest-Loan Funds
<a href="#">6804007</a>	Nursing Loan Match Fund
<a href="#">6804008</a>	SEOG Matching Funds
<a href="#">6804009</a>	Indian Scholarships
<a href="#">6804010</a>	Student Work Program
<a href="#">6804011</a>	Financial Aid Schol
<a href="#">6804012</a>	Financial Aid Exec Mgmt
<a href="#">6804013</a>	Financial Aid Fellow

Select the specific department.

Customize | Find | First 1 of 1 Last

**Department**

1 | 6804010 | Student Work Program | + | -

[Return To Operator Dept. Level Security](#)

Save

Select the + button to add another specific department to the employee's Department Security profile or select the - button to delete a department.

When finished, select Save and then the [Return to Operator Dept. Level Security](#) link.

**Department Operator Security**

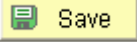
**Department**

6FIN\_AID Financial Aid

**Specific Departments**

6804010-Student Work Program

The selected department/s appear under **Specific Departments**.

Select  Save when finished to save all new settings and then select the [Return To Manage Role Distribution](#) link to return to **Manage Employee Access** page.

### **Business Unit User Security**

The **BU User Security** section is used to define which Business Units (UMS01 – UMS08) employees can view and include when creating journal entries.

To set an employee's Business Unit level security, from the **Security Options** section, select the [BU User Security](#) link.

The **Unit Security by User ID** page will open:

The **BU by User ID** page will open:

**BU by User ID**

User ID: 9000005

**Accessible Business Units** Custom

Business Unit	Description		
UMS08	UMS System-Wide Services		
UMS07	Univ of Maine at Presque Isle	+	-
UMS06	University of Southern Maine	+	-
UMS05	University of Maine	+	-
UMS04	University of Maine at Machias		
UMS03	Univ of Maine at Fort Kent		
UMS02	Univ of Maine at Farmington		
UMS01	University of Maine at Augusta		

By default, employee's who are assigned journal entry-related roles will have access to all UMS Business Units.

Select the **-** button to delete a Business Unit or select the **+** button to add a Business Unit to an employee's Business Unit Security.

Save Return to Search

Select  when finished to save your settings.

### Ledger User Security

The **Ledger User Security** section is used for access to specific ledgers (ACTUALS, BUDGET, BASEBUD, FUTBUD) when creating journal entries.

To set an employee's Ledger security, from the **Security Options** section, select the [Ledger User Security](#) link.

The **Ledger Security by User ID** page will open:

**Ledger Security by User ID**

Enter any information you have and click Search. Leave fields blank if you are not sure.

**Find an Existing Value**

User ID:

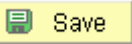
Description:

Case Sensitive


[Basic Search](#)

Enter employee's 7-digit Employee ID in **User ID** field or enter the last name in the **Description** field. Select  when ready.

The **Ledger by User ID** page will open:

Select  when finished to save your settings.

## 6. Report Grouping


In the **Report Grouping** section of the **Manage Employee Access** system you can set “row level security” for employees who generate reports from the General Ledger. To do so, select the Report Grouping icon  on the **Manage Employee Access** page. The **Sec. Report Grouping** page will open:

When ready, select . The **Security Report Grouping** page will open:



If you only want an employee to generate reports for a specific Department, you should first enter the **top level node** on the Business Unit's Department tree in the Department field.



Next, you would select the **Specific Department** icon  to look up and select the specific Department value. See page 26 of this document for information about selecting specific department values.

If you want an employee to generate reports for a Project that is shared across Business Units but the reports should be based on a specific Business Unit, you would apply the security settings in the following way:

You would first enter the **top level node** on the **Department** tree for the Business Unit in the Department field.



You would then select the node for the Project on the **Project** tree.

**Remember** – When you want to set report security based on any combination of **Department, Program** or **Project**, you must enter the combination in the same row on the **Security Report Grouping** page. Each row designates a separate security setting. If an employee needs to generate a number of reports that require different security settings, you can enter multiple rows to establish security for each scenario.

Select the  button to add a row to the employee's Report Grouping profile or select the  button to delete a row.