Baylor University uses Fischer Identity Management to help manage various user accounts including TRAX/PeopleSoft. This system helps our campus community by simplifying and automating the complex task of managing identities, resources, and permissions across multiple systems. This guide is intended to demonstrate how you can use Fischer to request, change, and/or approve access in the TRAX/PeopleSoft financial system. If you have questions beyond what is contained in this guide, please send an email to TRAX@baylor.edu

To begin, visit bearid.baylor.edu. Log in with your BearID and password.

**Requesting a New Account**

To request access to TRAX (you do not already have an active TRAX account), click Requests followed by Request Access.
Step 1: Select a user
If you are requesting a TRAX account, for yourself, click the Include Self checkbox.

**Note: You can only request access for yourself or those individuals you directly supervise.
Once you have selected the correct person (yourself or another user), proceed to step 2 and select the system/resource you wish to request access to (TRAX).

**Step 2: Select Resources and Permissions**
From the dropdown menu, select TRAX.

A list of choices will open up and you will complete 2 or 3 sections here, depending on what you need access to. If you need access to a Baylor budget, select **PeopleSoft – Dept ID** and/or if you need access to a grant-related fund select **PeopleSoft – Project ID**. **EVERYONE will need to complete the PeopleSoft – Role Access section.**
For the *PeopleSoft – Dept ID* section, mark the checkbox and then search for the department(s) you need access to. Select as many as you need and click *Done* when complete. You can also do this for the *PeopleSoft – Project ID* section as well.

Department IDs:
Project IDs:
For the *PeopleSoft – Role Access* section, mark the checkbox next to each role the user needs access to. Select as many as you need and click *Done* when complete.

When section 2 is complete, click *Done* and proceed to step 3.
(Optional) If you need access to multiple systems/resources, you can click the *Add Resources* button and complete this step again for another system. Otherwise, proceed to Step 3.
Step 3: Specify Access Period
If there is an end date for this request, enter it in the End field, otherwise if the access should remain in place until the user's employment ends, click the Permanent checkbox.

Step 4: Submit Request
Enter a justification for your request and any notes or comments you have for the reviewers in this field. If you are replacing someone or if there is someone else’s account that we should use to copy or mirror, you can also enter that information in this field. Click the Submit Request button when complete.

Click the Close button.
At this point, your request has been forwarded on for review. You can click the *View Requests* tab to check the status.
Changing Existing Access

To request access to TRAX (you do not already have an active TRAX account), click Requests followed by Change Access.

Step 1: Select type of change
Select the appropriate option from the list of choices.

- Remove Access should be used if you wish to remove your access to the TRAX system altogether.
- Change Access Period should be used if your employment is temporary and you need to extend your end date.
- Change permission should be used for all other changes including changes to department IDs, project IDs, or adding/removing new roles.

Step 2: Select user or resource
Search for the person you wish to update. You can search for the person using the Search field or if making a change to your account, mark the Include Self checkbox.

Next, select the resource you wish to update. Click Done when complete.
Step 3: Select permissions
In this example, a request to modify the person’s role based access is shown. The person has existing access to Budgets, Vouchers & Requisitions, and Departmental Receipts, but wishes to add access to Departmental Adjustments. Click the necessary checkboxes.

In the example below, a request to modify the person’s department ID access is shown. The person has existing access to one department, but wishes to add an additional department ID. Search for the department ID(s) you wish to add and click the necessary checkboxes. You can search by department ID number OR the name of the department, as shown.
Searching by department name/description:

Click **Done** when complete.

**Step 4: Submit request**

Enter a justification for your request and any notes or comments you have for the reviewers in this field. Click the **Submit Request** button when complete.
Viewing the History
Click *Requests*, followed by *View Requests* to see the status of an access request you have made. Click the small arrow on the left side of the screen to view more details.
Approving A Request

If you are a supervisor or department head, you may need to approve a request for access for an employee that reports to you. When you have a request to approve, the Fischer system will send you an email.

Select the request you wish to review by marking the checkbox on the left side of the screen. Be sure to click the small blue arrow to review the details of the request.

Next to each item requested, mark the radio button for one the appropriate option: approve, deny, or reassign. While approve and deny are self-explanatory, the reassign task should be used in the event you need someone else to review the request. An example of each is shown below.
Approving a request:
Denying a request:

Reassigning a request:
Once you have responded to each item, click the Submit button.

You will receive this message. Click Submit when you are ready to move the request forward.

The request will then clear out of your approval page.
Note: If you choose to approve the request without reviewing it, this is the screen you will see. This is not the preferred method of approving a security request. We advise expanding to view the detail and carefully reviewing and checking each item before clicking the Submit button.

Note: If you do not respond to an item, you will receive the following message. This does not delay your request. The items you approved will move forward, however, the overall status will remain pending and the unfinished item will remain in your approval list until you respond.
Delegating Approval

If you are going to be out of the office for an extended time and wish to delegate your approval authority, follow the instructions below.

Click *My Profile* followed by *Delegate Approval Requests*.

Next, switch the dropdown box to *On*.

Search for the person you wish to set as your delegate.
Mark the radio button next to the person you wish to set as your delegate. Set the duration, specify the resource requests to be delegated and click the **Save** button.