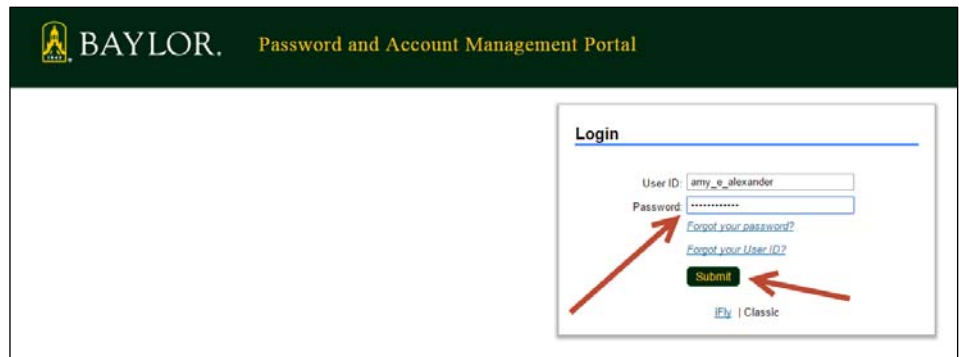




## Requesting Access Through Fischer Identity Management

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 change your 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](mailto:TRAX@baylor.edu)

To begin, visit [bearid.baylor.edu](http://bearid.baylor.edu). Log in with your BearID and password.

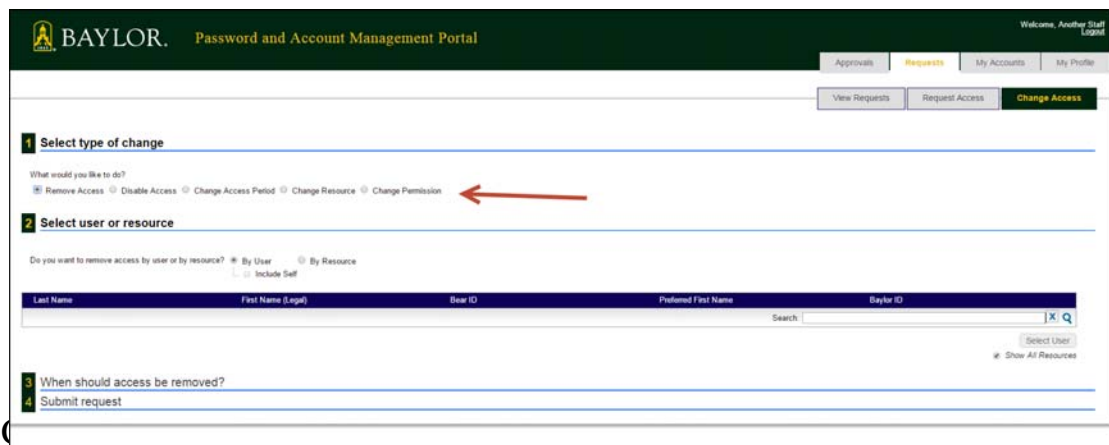


### Changing Existing Access

To request a change of access to your TRAX account (you already have an active TRAX account, need to change your existing access by adding/removing a department or role, have transferred to a new department, etc.), 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.

## Step2: 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.

The screenshot shows the 'Select user or resource' step in the PeopleSoft Password and Account Management Portal. The page has a dark green header with the Baylor logo and 'Password and Account Management Portal' text. On the right, there's a user greeting 'Welcome, Another Staff' and a 'Logout' link. Below the header are navigation tabs: 'Approvals', 'Requests' (highlighted), 'My Accounts', and 'My Profile'. Under 'Requests', there are buttons for 'View Requests', 'Request Access', and 'Change Access' (highlighted).

The main content area is titled '1 Select type of change' and '2 Select user or resource'. Under '2', there are radio buttons for 'By User' (selected) and 'By Resource', and a checkbox for 'Include Self' which is circled in red. Below this is a table with columns: Last Name, First Name (Legal), Dear ID, Preferred First Name, Baylor ID, Resource Name, Account, Start Date, End Date, and Status. The table contains two rows of data. At the bottom of the table are 'Cancel' and 'Done' buttons, with a red arrow pointing to 'Done'. Below the table are buttons for 'Select User' and 'Show All Resources'.

Last Name	First Name (Legal)	Dear ID	Preferred First Name	Baylor ID	Resource Name	Account	Start Date	End Date	Status
				83296011	PersonSoft - Role Access (Allows you to request PeopleSoft role access)	AQS1	07/21/2016	Permanent	Assigned
					PersonSoft - Dept ID (Allows you to request different PeopleSoft department leve...)	AQS1	07/21/2016	Permanent	Assigned



### 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.

Do you want to change permission by user or by resource?  By User  By Resource  
 Include Self

Last Name	First Name (Legal)	Dear ID	Preferred First Name	Baylor ID
Staff	Another	Another_Staff	Another	892386011
Resource Name	Account	Start Date	End Date	Approval
PeopleSoft - Role Access (Allows you to request PeopleSoft role access)	AQS1	07/21/2016	Permanent	None
1 Total				

Select User  
Show All Resources

### 3 Select permissions

Search:

Name	Description	Status	Approval
<input type="checkbox"/> Access - Grants & Sponsored Programs	Access - Grants & Sponsored Programs	Available	Required
<input checked="" type="checkbox"/> Budget Information	Budget Information	Assigned	Required
<input type="checkbox"/> Functional User	Functional User	Available	Required
<input type="checkbox"/> Inquiry Only - Vouchers & Requisitions	Inquiry Only - Vouchers & Requisitions	Available	Required
<input type="checkbox"/> Key Budget Contact	Key Budget Contact	Available	Required
<input type="checkbox"/> Transactional Approval - Budget Change Requests	Transactional Approval - Budget Change Requests	Available	Required
<input type="checkbox"/> Transactional Approval - Departmental Adjustments	Transactional Approval - Departmental Adjustments	Available	Required
<input type="checkbox"/> Transactional Approval - Requisitions	Transactional Approval - Requisitions	Available	Required
<input type="checkbox"/> Transactional Approval - Vouchers	Transactional Approval - Vouchers	Available	Required
<input type="checkbox"/> Transactional Entry - Budget Change Requests	Transactional Entry - Budget Change Requests	Available	Required
<input checked="" type="checkbox"/> Transactional Entry - Departmental Adjustments	Transactional Entry - Departmental Adjustments	Available	Required
<input checked="" type="checkbox"/> Transactional Entry - Departmental Receipts	Transactional Entry - Departmental Receipts	Assigned	Required
<input checked="" type="checkbox"/> Transactional Entry - Vouchers and Requisitions	Transactional Entry - Vouchers and Requisitions	Assigned	Required
13 Total			

### 4 Submit request

Enter comments below, then click Submit Request.

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.

**BAYLOR** Password and Account Management Portal

Approvals Requests My Accounts My Profile

View Requests Request Access Change Access

### 1 Select type of change

What would you like to do?  
 Remove Access  Disable Access  Change Access Period  Change Resource  Change Permission

### 2 Select user or resource

Do you want to change permission by user or by resource?  By User  By Resource  
 Include Self

Last Name	First Name (Legal)	Dear ID	Preferred First Name	Baylor ID
Staff	Another	Another_Staff	Another	892386011
Resource Name	Account	Start Date	End Date	Approval
PeopleSoft - Dept ID (Allows you to request different PeopleSoft department level) <a href="#">More</a>	AQS1	07/21/2016	Permanent	None
1 Total				

Select User  
Show All Resources

### 3 Select permissions

Search: 02811

Name	Description	Status	Approval
<input type="checkbox"/> 0281106	Prof & Organizational Development	Available	Required
<input type="checkbox"/> 0281110	Office of the VP for IT/Dean	Available	Required
<input type="checkbox"/> 0281120	BU Sustainability	Available	Required
<input type="checkbox"/> 0281175	I T S - Management	Available	Required
<input checked="" type="checkbox"/> 0281176	ITS-Administrative Services	Available	Required
<input type="checkbox"/> 0281177	ITS-ID Systems	Available	Required
<input type="checkbox"/> 0281179	ITS Dept Systems and Services	Available	Required
<input checked="" type="checkbox"/> 0281180	ITS Information Systems & Svcs	Assigned	Required
<input type="checkbox"/> 028118001	ISS-Financial Systems	Available	Required
<input type="checkbox"/> 028118002	ISS-HR Systems	Available	Required
<input type="checkbox"/> 028118003	ISS-Alum/Dev Systems	Available	Required
<input type="checkbox"/> 028118004	ISS-Student Systems	Available	Required
<input type="checkbox"/> 028118005	ISS-Event Ticketing	Available	Required



### Searching by department name/description:

3 Select permissions

Search:

Name	Description	Status	Approval
432MAJE	Wilson Biology Research	Available	Required
432MAUO	Biology Endowment Fund	Available	Required
432MAUZ	Grigsby Max Co Biology Endow	Available	Required
432MBEG	Browning Biology Travel Endow	Available	Required
432SDFW	Bulter Freshman Biology Schip	Available	Required
432SDYW	Eldridge David Schip-Biology	Available	Required

Click *Done* when complete.

BAYLOR Password and Account Management Portal

1 Select type of change

What would you like to do?  
 Remove Access  Disable Access  Change Access Period  Change Resource  Change Permission

2 Select user or resource

Do you want to change permission by user or by resource?  By User  By Resource  
 Include Self

Last Name	First Name (Legal)	Dear ID	Preferred First Name	Baylor ID		
PeopleSoft - Role Access (Allows you to request PeopleSoft role access)		AQS1		07/21/2016	Permanent	Assigned
PeopleSoft - Dept ID (Allows you to request different PeopleSoft department leve...)		AQS1		07/21/2016	Permanent	Assigned

2 Total

3 Select permissions

4 Submit request

### 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.

<input type="checkbox"/> Transactional Approval - Vouchers	Transactional Approval - Vouchers	Available	Required
<input checked="" type="checkbox"/> Transactional Entry - Budget Change Requests	Transactional Entry - Budget Change Requests	Available	Required
<input checked="" type="checkbox"/> Transactional Entry - Departmental Adjustments	Transactional Entry - Departmental Adjustments	Available	Required
<input checked="" type="checkbox"/> Transactional Entry - Departmental Receipts	Transactional Entry - Departmental Receipts	Assigned	Required
<input checked="" type="checkbox"/> Transactional Entry - Vouchers and Requisitions	Transactional Entry - Vouchers and Requisitions	Assigned	Required

13 Total

4 Submit request

Enter comments below, then click Submit Request



## 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.

The screenshot shows the 'Password and Account Management Portal' for a user named 'Another Staff'. The 'Requests' tab is active, and the 'View Requests' button is highlighted. Below the navigation bar, a table lists resource requests. The first request is expanded to show its details and history.

ID	Date Submitted	Resources	Submitted By	Beneficiary	Type	Status
420904	07/21/2016 10:52 AM	PeopleSoft - Dept ID PeopleSoft - Role A	Staff: Another	Staff: Another	Add	Pending

Request Access		Beneficiary: Staff: Another		Department: ITS-Information Systems & Services		Baylor Email Address: Another_Staff@baylor.edu	
Title: Analyst/Programmer		Supervisor ID: Leman, Margaret		Phone:		RESULT: Pending	
Resource: PeopleSoft - Role Access (Allows you to request PeopleSoft role access)							RESULT: Pending
Start Date:	Immediate						
End Date:	Permanent						
History							
Resource: PeopleSoft - Dept ID (Allows you to request different PeopleSoft department leve...)							RESULT: Pending
Start Date:	Immediate						
End Date:	Permanent						
History							
	Event	User	Comments / Details				
07/21/2016 10:52 AM	Submitted	Staff: Another	My job duties include assisting with the financial transactions that occur in this department.				
07/21/2016 10:52 AM	In-process	System	Resource PeopleSoft - Dept ID System PeopleSoft				
07/21/2016 10:52 AM	Assigned	Allen, Jim	Time for Approval: 96 23h 46m.				

1 Total Show Only Pending Requests



PeopleSoft Financials Version 9.2

Notes: