

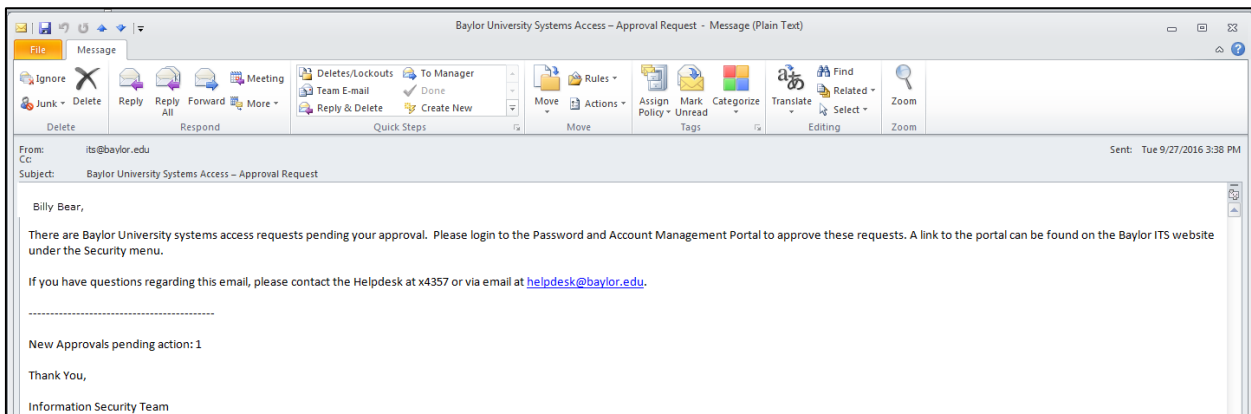


Requesting Access Through Fischer Identity Management

Baylor University uses Fischer Identity Management to help manage various user accounts including TRAX/PeopleSoft. This system is also known as the Baylor Password and Account Management Portal and it 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

Approving A Request

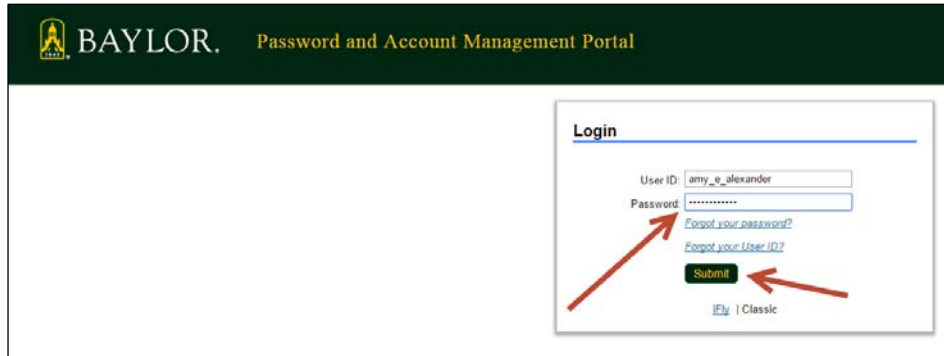
If you are listed as a department head, you may need to approve a request for access for an employee that is assigned to your area. When you have a request to approve, the Fischer system will send you an email.



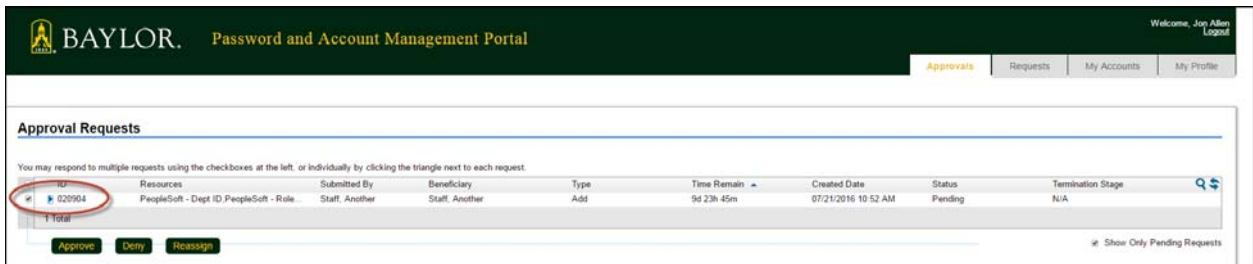
*Note: the emails are generic and do not contain details of the request you need to approve. Likewise, they do not contain a link to the Password and Account Management Portal. Some users have reported finding this email notification in their Junk or Clutter folders so be sure to add this address to your “Safe Senders” list if you manage a specific area of campus.



To access the portal, you will need to visit bearid.baylor.edu. Log in with your BearID and password.



Click the *Approvals* tab and 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:

The screenshot shows the 'Request Access' page in the PeopleSoft system. At the top, there is a navigation bar with 'Approvals', 'Requests', 'My Accounts', and 'My Profile'. Below this, a table lists request details. Two requests are visible:

ID	Resources	Submitted By	Beneficiary	Type	Time Remain	Created Date	Status	Termination Stage
020924	PeopleSoft - Role Access, PeopleSoft - ...	Staff, Another	Staff, Another	Add	10d 0h 0m	07/21/2016 11:15 AM	Pending	N/A

Each request has a 'Request Access' section with details like Beneficiary, Department, and Resource. The 'Approve' buttons are highlighted with red arrows.

This screenshot shows the same 'Request Access' page as above, but with the 'Approve' buttons for both requests selected. The 'Approve' buttons are highlighted in green, indicating they have been clicked.



Denying a request:

The screenshot shows three request cards. The second card, titled 'Resource: PeopleSoft - Role Access', has a red arrow pointing to the 'Deny' button in the top right corner. The card details include: Permission: Budget Information (Budget Information), Start Date: Immediate, End Date: Permanent, and a comment: 'I am not in agreement with adding this access at this time.' Below the card is a history table with columns for Date, Event, User, and Comments/Details.

Date	Event	User	Comments / Details
07/21/2016 11:15 AM	Submitted	Staff, Another Alexander, Amy	Please approve my request
07/21/2016 11:15 AM	Assigned	Staff, Another Alexander, Amy	

Reassigning a request:

The dialog box is titled 'Select the new Approver'. It shows a request card for 'Role Access' with the 'Reassign' button highlighted. Below, step 1 asks 'How do you want to reassign this approval request?' with the option 'REASSIGN TO A SPECIFIC APPROVER' selected. A search table shows 'Carter, Geneva' as the selected approver. Step 2 asks to 'Enter any comments below, then click Done.' with a text area containing 'Please let me know if you are in agreement with this request'. At the bottom are 'Cancel' and 'Done' buttons.

Baylor ID	Last Name	First Name (Legal)	Department	Title
88	Carter	Geneva	ITS-Information Systems & Services	Production Services Assistant



Once you have responded to each item, click the Submit button.

History	Event	User	Comments / Details
07/21/2016 11:15 AM	Submitted	Staff_Another	Please approve my request
07/21/2016 11:15 AM	Assigned	Alexander, Amy	

History	Event	User	Comments / Details
07/21/2016 11:15 AM	Submitted	Staff_Another	Please approve my request
07/21/2016 11:15 AM	Assigned	Alexander, Amy	

You are about to submit this approval request for processing. This action cannot be undone.

Cancel **Submit**

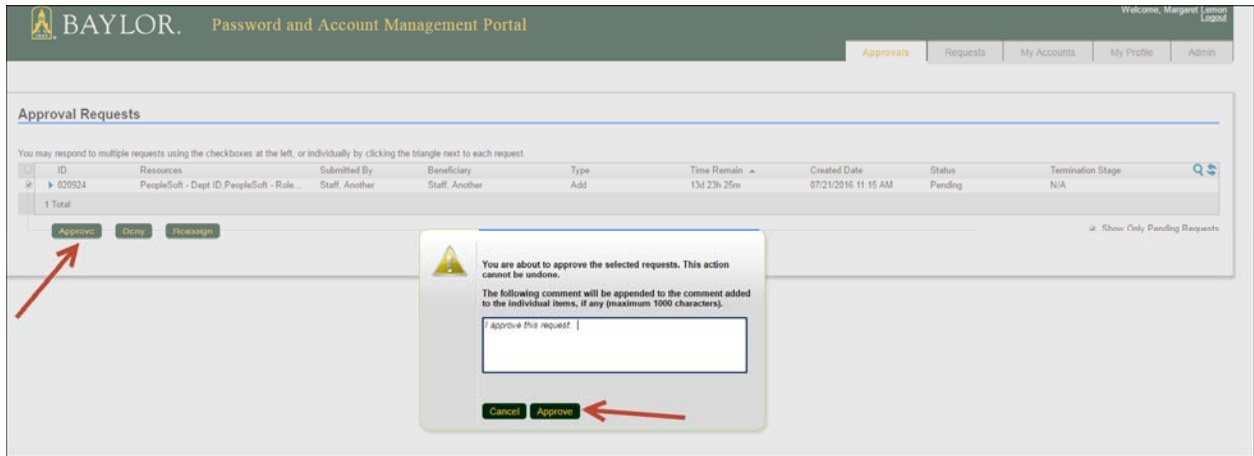
You will receive this message. Click Submit when you are ready to move the request forward.

The request will then clear out of your approval page.

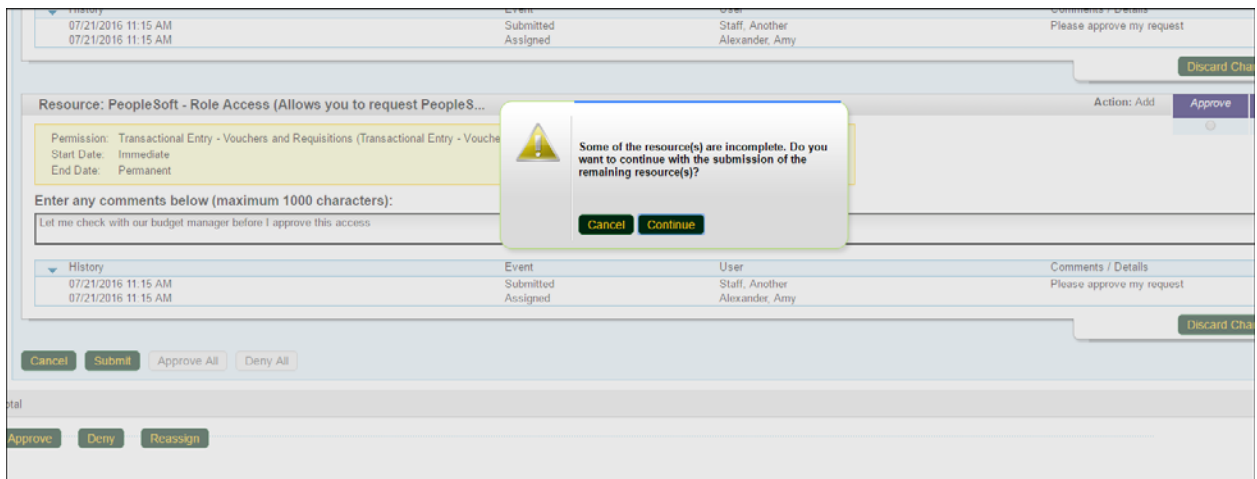
ID	Resources	Submitted By	Beneficiary	Type	Time Remains	Created Date	Status	Termination Stage
No requests match your search criteria								



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.





PeopleSoft Financials Version 9.2

Notes: