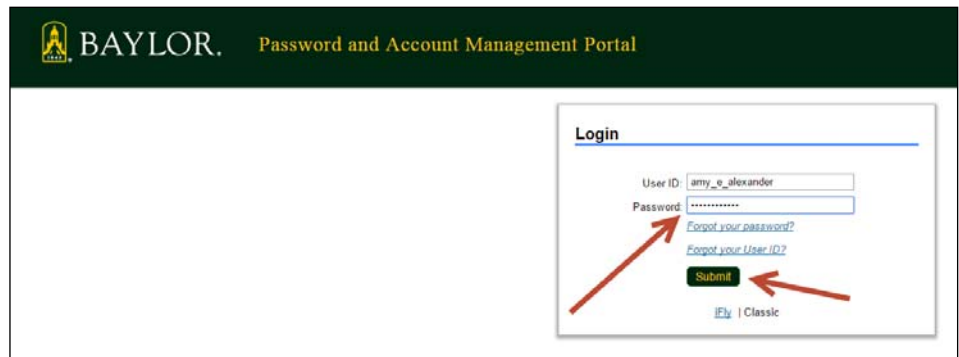




Requesting Access Through Fischer Identity Management

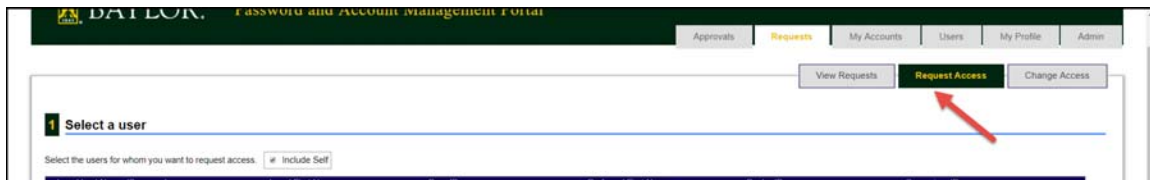
Baylor University uses Fischer Identity Management to help manage various user accounts including TRAX/PeopleSoft. This system helps our campus community by simplifying and automating the complex task of managing identities, resources, and permissions across multiple systems. This guide is intended to 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

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



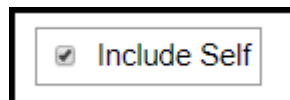
Adding a Role

To request access to a new role for your existing TRAX account, click *Requests* followed by *Request Access*.



Step 1: Select User

Click the *Include Self* checkbox.





Step 2: Select permissions

From the dropdown menu, select *TRAX*.

1 Select a user

Select the users for whom you want to request access. Include Self

Legal Last Name (Surname)	Legal First Name	Bear ID	Preferred First Name	Baylor ID	Supervisor ID
Bear	Billy	Billy_Bear	Billy	184511845	Bobby Baylor

2 Select resources and permissions

Baylor Resources: TRAX

Name	Description	Permission	Description	Approval
PeopleSoft - Dept ID	Allows you to request different PeopleSoft department level access			None
PeopleSoft - Project ID	PeopleSoft - Project ID			None
PeopleSoft - Role Access	Allows you to request PeopleSoft role access			None

3 Specify access period

4 Submit request

Click the *PeopleSoft – Role* option

1 Select a user

Select the users for whom you want to request access. Include Self

Legal Last Name (Surname)	Legal First Name	Bear ID	Preferred First Name	Baylor ID	Supervisor ID
Alexander	Amy	Amy_E_Alexander	Amy	880235165	Able, Peter

2 Select resources and permissions

Baylor Resources: TRAX

Name	Description	Permission	Description	Approval
PeopleSoft - Dept ID	Allows you to request different PeopleSoft department level access			None
PeopleSoft - Project ID	PeopleSoft - Project ID			None
PeopleSoft - Role Access	Allows you to request PeopleSoft role access			None

3 Specify access period

4 Submit request

Click *Done*

Cancel Done



Click the necessary checkboxes for the role(s) you wish to add.

Permissions	Description	Approval
<input type="checkbox"/> Access - Grants & Sponsored Programs	Access - Grants & Sponsored Programs	Required
<input type="checkbox"/> Budget Information	Budget Information	Required
<input type="checkbox"/> Inquiry Only - Vouchers & Requisitions	Inquiry Only - Vouchers & Requisitions	Required
<input type="checkbox"/> Key Budget Contact	Key Budget Contact	Required
<input type="checkbox"/> Other/Non-Standard User	Other/Non-Standard User	Required
<input type="checkbox"/> Transactional Approval - Budget Change Requests	Transactional Approval - Budget Change Requests	Required
<input type="checkbox"/> Transactional Approval - Departmental Adjustments	Transactional Approval - Departmental Adjustments	Required
<input type="checkbox"/> Transactional Approval - Requisitions	Transactional Approval - Requisitions	Required
<input type="checkbox"/> Transactional Approval - Vouchers	Transactional Approval - Vouchers	Required
<input type="checkbox"/> Transactional Entry - Budget Change Requests	Transactional Entry - Budget Change Requests	Required
<input type="checkbox"/> Transactional Entry - Departmental Adjustments	Transactional Entry - Departmental Adjustments	Required
<input type="checkbox"/> Transactional Entry - Departmental Receipts	Transactional Entry - Departmental Receipts	Required
<input type="checkbox"/> Transactional Entry - Vouchers and Requisitions	Transactional Entry - Vouchers and Requisitions	Required

Click *Done* when complete.



Step 3: Specify Access Period

If this request is temporary in nature, be sure to note that in the start and end date fields, otherwise leave the permanent checkbox checked.

3 Specify access period

Start: 05/30/2018 End: Permanent

4 Submit request

Enter comments below, then click Submit Request.

I need access to voucher and req entry for my job duties

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.

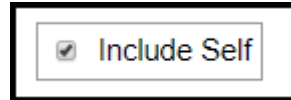


Adding a Department or Project

To request access to a new department or project for your existing TRAX account, click *Requests* followed by *Request Access*.

Step 1: Select User

Click the *Include Self* checkbox.



Step 2: Select permissions

From the dropdown menu, select *TRAX*.

1 Select a user

Select the users for whom you want to request access. Include Self

Legal Last Name (Surname)	Legal First Name	Bear ID	Preferred First Name	Baylor ID	Supervisor ID
Bear	Billy	Billy_Bear	Billy	184511845	Bobby Baylor

2 Select resources and permissions

Baylor Resources: TRAX

Name	Description	Permission	Description	Approval
PeopleSoft - Dept	Allows you to request different PeopleSoft department level access			None
PeopleSoft - Ph	Allows you to request different PeopleSoft Project ID			None
PeopleSoft - Role	Allows you to request PeopleSoft role access			None

3 Specify access period

4 Submit request

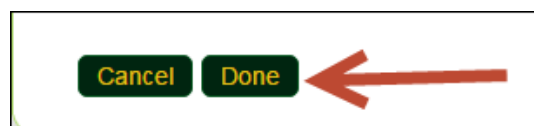
Click the *PeopleSoft – Department* and/or *PeopleSoft - Project* option

2 Select resources and permissions

Baylor Resources: TRAX

Name	Description	Permission	Description	Approval
PeopleSoft - Dept ID	Allows you to request different PeopleSoft department level access			None
PeopleSoft - Project ID	PeopleSoft - Project ID			None
PeopleSoft - Role Access	Allows you to request PeopleSoft role access			None

Click *Done*





Click the necessary checkboxes for the department(s) or project(s) you wish to add. To aid in your search, you can enter as much of the department or project you know (organizational prefixes such as 085, 012, 025, 032, etc.)

Click *Done* when complete.



Step 3: Specify Access Period

If this request is temporary in nature, be sure to note that in the start and end date fields, otherwise leave the permanent checkbox checked.

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.

The screenshot displays 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
620904	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
Title:	Analyst/Programmer	Supervisor ID:	Lemon, Margaret
Resource: PeopleSoft - Role Access (Allows you to request PeopleSoft role access)		Baylor Email Address: Another_Staff@baylor.der	
Start Date:	Immediate	Phone:	
End Date:	Permanent	RESULT: Pending	
History			
Resource: PeopleSoft - Dept ID (Allows you to request different PeopleSoft department leve...)			
Start Date:	Immediate	RESULT: Pending	
End Date:	Permanent		
History			
Event	User	Comments / Details	
Submitted	Staff: Another	My job duties include assisting with the financial transactions that occur in this department.	
In-process	System	Resource PeopleSoft - Dept ID: System PeopleSoft	
Assigned	Allen, Jon	Time for Approval: 9d 23h 46m	

1 Total Show Only Pending Requests



PeopleSoft Financials Version 9.2

Notes: