



ORACLE E-BUSINESS SUITE

FINANCIAL RESPONSIBILITY REQUEST

TABLE OF CONTENTS

A. OVERVIEW	2
B. ADD RESPONSIBILITY.....	3
C. DELETE RESPONSIBILITY	11
D. VALIDATION/ERROR MESSAGES	16
1. <i>NO DUTY SELECTION</i>	16
2. <i>PROJECT MANAGER, ALTERNATE APPROVER, PROJECT REVIEWER</i>	16
3. <i>SMALL PURCHASE ORDERS</i>	17
4. <i>SMALL PURCHASE ORDERS OR REQUISITION: PURCHASE-TRAVEL-IDT</i>	18
5. <i>CREATE THIRD PARTY INVOICING</i>	20
6. <i>FUNDS/ACCOUNT INQUIRY</i>	20
7. <i>PROPERTY TRANSFERS/ASSET INVENTORY REPORT</i>	20
8. <i>BUDGET REVISION</i>	21
9. <i>ACKNOWLEDGEMENT</i>	21
E. APPROVAL PROCESS.....	23

OVERVIEW

The Oracle Finance Roles and Responsibilities form found in the DBA forms website under Accounts Control has been replaced with the Oracle online Financial Responsibility Request form found within the UTPA Employee Self Service responsibility. Instead of submitting the paper form to receive Oracle responsibility access, you now have the benefit of submitting it online through Oracle. As opposed to the paper document being routed for various signatures, the online form will seek approvals through a workflow process. Please see below for further details and guidance.

FOR QUESTIONS, PLEASE SEND AN EMAIL TO: FINAPPS@LISTSERV.UTPA.EDU

ADD RESPONSIBILITY

STEP 1: Login to Oracle E-Business Suite

N > UTPA Employee Self Service > Financials Responsibility Request

<ul style="list-style-type: none">EiS Self Service TimeEiS Supervisor Timecard Review And ApprovalUTPA Employee Self ServiceUTPA Manager Self Service	<p>UTPA Employee Self Service</p> <ul style="list-style-type: none">NotificationsSaved for Later Inbox <p>UTPA Employee Self Service Main Menu</p> <ul style="list-style-type: none">W4Pay SlipPayroll Payments (Direct Deposit)Employee W2Assignment HistoryVisa/Passport DetailsOther Employee InfoTraining Events / SEPAP InfoFaculty Tenure InfoFaculty Rank InfoFaculty Release Time InfoReconciliation of W-2 Earnings <p>Update Functions</p> <ul style="list-style-type: none">Personal InformationW4ComplianceNepotismUTPA Faculty Salary SpreadFaculty Salary Spread Election <p>Benefits</p> <ul style="list-style-type: none">Employee BenefitsManage Dependents <p>Other Functions</p> <ul style="list-style-type: none">Financials Responsibility Request
--	--

STEP 2: Click on Financials Responsibility Request and the Financials Responsibility Request form will appear.

UTPA Employee Self Service Main Menu Home Logout Preferences

Finapps Responsibility Request Clear Next

Step 1: Select Employee

Employee Name
Tip: Use wildcard '%' for quick search.
Example: %Smith% or %Mary%

Employee ID
Employee Name
Employee User Name
Employee Status
Assignment Category

Step 2: Select Action

Add Responsibility
 Delete Responsibility

Clear Next

STEP 3: Select Employee

A) Enter the employee's last name that you will be requesting access for.

Note: Read the tip below the Employee Name for alternative ways on how to search for the employee.

Step 1: Select Employee

Employee Name
Tip: Use wildcard '%' for quick search.
Example: %Smith% or %Mary%

Search for the employee the access will be requested for

Employee ID
Employee Name
Employee User Name
Employee Status
Assignment Category



B) Click on the flash light  to search for the employee name.

Search and Select: Employee Name Cancel Select

Search
To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By

Results


Select	Quick Select	Full Name	Employee ID	User Name	Org Name
<input type="radio"/>		Lopez, Ms Elia Elizondo	70000401	XXUTPAELIA	Comptroller
<input type="radio"/>		Lopez, Ms Josefina	70000870	VALDEZ	Materials Management

Cancel Select

C) Click 'Quick Select' icon.

Note: Once the employee is selected, the fields 'Employee ID', 'Employee Name', 'Employee Username', 'Employee Status' and 'Assignment Category' will automatically populate.

Step 1: Select Employee

Employee Name 
Tip: Use wildcard '%' for quick search.
Example: %Smith% or %Mary%

Employee ID

Employee Name

Employee User Name

Employee Status

Assignment Category

STEP 4: Select Action

A) Select 'Add Responsibility' action.

Step 2: Select Action

Add Responsibility
 Delete Responsibility

B) Click 'Next' to continue to Step 3.

UTPA UTPA Employee Self Service Main Menu Home Logout Preferences

(Back) (Review)

Add Responsibilities For Lopez, Ms Josefina/70000870/Fulltime-Regular

Step 3: Select Project Manager and Projects

Project Manager * Effective Date

Tip: Use wildcard '%' for quick search.
Example: %Smith% or %Mary%

Step 4: Select Duties

Active Responsibilities Previous 1-5 Next 5 >

Responsibility Name	Effective Start Date	Effective End Date
UTPA GL Inquiry	31-Aug-2006	
UTPA GL Security Define	02-Oct-2007	
UTPA PA/GMS Inquiry Only	20-Dec-2007	
UTPA PO Training	02-May-2008	
UTPA Payables Inquiry	04-Jan-2008	

Duties

Select Duty Name	Responsibility
<input type="checkbox"/> Budget Revision	UTPA Budget User
<input type="checkbox"/> Create Third Party Invoicing	UTPA Receivables Department User
<input type="checkbox"/> Funds/Account Inquiry	UTPA GL Inquiry ,XXEIS General Ledger Reports
<input type="checkbox"/> Non PO Request	UTPA Payables Inquiry
<input type="checkbox"/> Project Manager, Alternate Approver, Project Reviewer	UTPA PA/GMS Project Manager
<input type="checkbox"/> Property Transfers/Asset Inventory Report	UTPA Fixed Assets Inquiry ,XXEIS Fixed Assets Reports
<input type="checkbox"/> Purchasing Inquiry	UTPA PO Inquiry
<input type="checkbox"/> Requisition: Purchase-Travel-IDT	* Responsibility will be generated based on project manager and project selected
<input type="checkbox"/> Service Department	UTPA Service Department
<input type="checkbox"/> Small Purchase Orders	* Responsibility will be generated based on project manager and project selected

Business Affairs Use Only

(Back) (Review)

STEP 5: Select Project Manager and Projects

A) Enter Project Manager's name and click on the flash light to search for the name. The Project Manager is a required field.

Note: Read the tip below the Project Manager for alternative ways on how to search for the project manager.

Step 3: Select Project Manager and Projects

Project Manager * Effective Date

Tip: Use wildcard '%' for quick search.
Example: %Smith% or %Mary%

Search and Select: Project Manager Cancel Select

Search
To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By

Results

Select	Quick Select	Full Name	Employee ID	User Name	Org Name
<input type="radio"/>		Dryer, Ms Norma Elizabeth	70001440	XXUTPADRYERN	Materials Management

Cancel Select

- B) Click 'Quick Select' icon and the Project Manager's name will be populated.
- C) Click on 'Select Project' button. A project is required for Purchasing and PA/GMS responsibilities only.

Step 3: Select Project Manager and Projects

Project Manager * Effective Date

Tip: Use wildcard '%' for quick search.
Example: %Smith% or %Mary%

This will list all the project numbers that pertain to the project manager that was selected.

UTPA UTPA Employee Self Service Main Menu Home Logout Preferences

Back Review

Add Responsibilities For Lopez, Ms Josefina/70000870/Fulltime-Regular

Step 3: Select Project Manager and Projects


Project Manager * Effective Date

Tip: Use wildcard '%' for quick search.
Example: %Smith% or %Mary%

Available Projects(Number~Name~Organization)		Selected Projects(Number~Name~Organization)
100MMCR00 ~ Central Receiving ~ Central Receiving		
100MMHB00 ~ HUB Program Office ~ Historically Underutilized Business Programs		
100MMOF00 ~ Materials Management ~ Materials Management		
21MMOF000 ~ S TX Construction Conference ~ Materials Management		
21MMOF001 ~ Econ Oppor Forum ~ Materials Management		
21MMOF002 ~ Staples Rebate ~ Materials Management		
22MMTS000 ~ Travel Services ~ Travel Services		

Project numbers that you will need access to. Once the project number is selected 'Click' on the arrow Move .

Available Projects(Number~Name~Organization)		Selected Projects(Number~Name~Organization)
21MMOF001 ~ Econ Oppor Forum ~ Materials Management	> Move >> Move All < Remove << Remove All	100MMCR00 ~ Central Receiving ~ Central Receiving
21MMOF002 ~ Staples Rebate ~ Materials Management		100MMHB00 ~ HUB Program Office ~ Historically Underutilized
22MMTS000 ~ Travel Services ~ Travel Services		100MMOF00 ~ Materials Management ~ Materials Management
		21MMOF000 ~ S TX Construction Conference ~ Materials Mana

The selected projects will now be on the right hand side. If you want to select all projects, click on the  option.

STEP 6: Select Duties

Active Responsibilities is a list of all assigned responsibilities the employee currently has.

- A) Select duties and click on ‘Review’ button. Validations will take place at this time. Please see attached validation sheet for instructions.

Step 4: Select Duties		
Active Responsibilities		
		< Previous 1-5 > Next 5 >
Responsibility Name	Effective Start Date	Effective End Date
UTPA GL Inquiry	31-Aug-2006	
UTPA GL Security Define	02-Oct-2007	
UTPA PA/GMS Inquiry Only	20-Dec-2007	
UTPA PO Training	02-May-2008	
UTPA Payables Inquiry	04-Jan-2008	
Duties		
Select All Select None		
Select Duty Name	Responsibility	
<input checked="" type="checkbox"/> Budget Revision	UTPA Budget User	
<input checked="" type="checkbox"/> Create Third Party Invoicing	UTPA Receivables Department User	
<input checked="" type="checkbox"/> Funds/Account Inquiry	UTPA GL Inquiry ,XEIS General Ledger Reports	
<input checked="" type="checkbox"/> Non PO Request	UTPA Payables Inquiry	
<input checked="" type="checkbox"/> Project Manager, Alternate Approver, Project Reviewer	UTPA PA/GMS Project Manager	
<input type="checkbox"/> Property Transfers/Asset Inventory Report	UTPA Fixed Assets Inquiry ,XEIS Fixed Assets Reports	
<input type="checkbox"/> Purchasing Inquiry	UTPA PO Inquiry	
<input type="checkbox"/> Requisition: Purchase-Travel-IDT	* Responsibility will be generated based on project manager and project selected	
<input type="checkbox"/> Service Department	UTPA Service Department	
<input checked="" type="checkbox"/> Small Purchase Orders	* Responsibility will be generated based on project manager and project selected	
Business Affairs Use Only		
<input type="button" value="Others"/>		

Once the review is completed, the page will take you to the final step of the request.

REVIEW PAGE: Provides a summary and acknowledgement of your request.

You will see all the selections you made for this request, the Project Manager name, effective date of when these duties will be active, the list of Project(s) and the duty selections.

If **you** are the initiator of your own request you will need to read and select the check box to accept the Acknowledgment of Regulations of University Information Resources.

have read and acknowledge my responsibilities as described above.

If the initiator is **not** the employee getting the access the Acknowledgement will be in the approval notification of the employee.

A) Click 'Submit' button.

 **UTPA Employee Self Service Main Menu** [Home](#) [Logout](#) [Preferences](#)

[Responsibilities](#) >

Review Responsibilities For Lopez, Ms Josefina/70000870/Fulltime-Regular

Project Manager -- Dryer, Ms Norma Elizabeth

Effective Date -- 27-May-2008

Selected Projects

Project Number/Name/Organization
100MMCR00 ~ Central Receiving ~ Central Receiving

Selected Duties

Duty	Responsibility
Small Purchase Orders	* Responsibility will be generated based on project manager and project selected

Please read the following information carefully.

Acknowledgement of Regulations of University Information Resources

The University's information and information systems are regulated under the "Texas Information Resources Management Act" and the "Texas Administrative Code." Use of these resources is subject to Texas "Computer Crimes Statute" and HOP 8.9.1 - Policy for the Use and Protection of Information Resources.

Under these regulations every individual with an account permitting use of the University's computerized information resources is responsible for such account and may be held liable for results arising from its use. This includes, but is not limited to: output in printed form; email and other forms of communications from the account; and the content of files residing in the account or transmitted from the account.

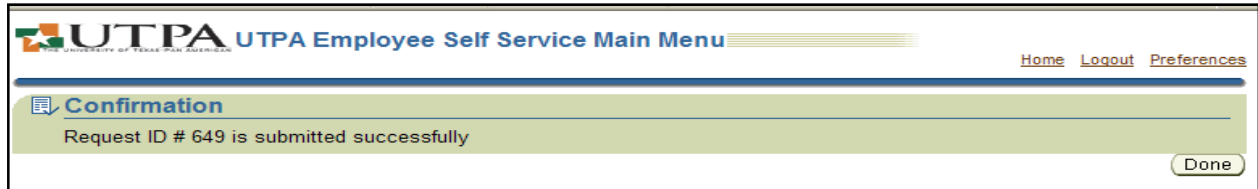
These regulations also restrict the purposes for which University Information Resources may be used. Failure to comply with the restrictions may result in cancellation of an individual's privilege of such use, appropriate disciplinary action, and action by law enforcement authorities. The restrictions include:

1. Individuals may not derive private economic benefit from use of University Information Resources.
2. Individuals are to take all reasonable measures necessary to protect the security of University Information Systems, including not sharing passwords with other individuals, keeping passwords secret, and not leaving logged in computers or terminals unattended and/or unsecured.

I have read and acknowledge my responsibilities as described above.

CONFIRMATION PAGE

You will receive a confirmation request number.



The screenshot shows a web interface for the University of Texas at Permian Basin (UTPA). At the top left is the UTPA logo with the text "UNIVERSITY OF TEXAS AT PERMIAN BASIN". To its right is the text "UTPA Employee Self Service Main Menu". In the top right corner, there are links for "Home", "Logout", and "Preferences". Below the header is a green bar with a document icon and the word "Confirmation". Underneath this bar, the text "Request ID # 649 is submitted successfully" is displayed. In the bottom right corner of the page, there is a "Done" button.

DELETE RESPONSIBILITY

STEP 1: Login to Oracle E-Business Suite

N > UTPA Employee Self Service > Financial Responsibility Request


<ul style="list-style-type: none">EiS Self Service TimeEiS Supervisor Timecard Review And ApprovalUTPA Employee Self ServiceUTPA Manager Self Service	<ul style="list-style-type: none">UTPA Employee Self Service<input type="checkbox"/> Notifications<input type="checkbox"/> Saved for Later InboxUTPA Employee Self Service Main Menu<input type="checkbox"/> W4<input type="checkbox"/> Pay Slip<input type="checkbox"/> Payroll Payments (Direct Deposit)<input type="checkbox"/> Employee W2<input type="checkbox"/> Assignment History<input type="checkbox"/> Visa/Passport Details<input type="checkbox"/> Other Employee Info<input type="checkbox"/> Training Events / SEPAP Info<input type="checkbox"/> Faculty Tenure Info<input type="checkbox"/> Faculty Rank Info<input type="checkbox"/> Faculty Release Time Info<input type="checkbox"/> Reconciliation of W-2 EarningsUpdate Functions<input type="checkbox"/> Personal Information<input type="checkbox"/> W4<input type="checkbox"/> Compliance<input type="checkbox"/> Nepotism<input type="checkbox"/> UTPA Faculty Salary Spread<input type="checkbox"/> Faculty Salary Spread ElectionBenefits<input type="checkbox"/> Employee Benefits<input type="checkbox"/> Manage DependentsOther Functions<input type="checkbox"/> Financials Responsibility Request
--	--

STEP 2: Click on Financials Responsibility Request Function

Note: This will open the Financial Responsibility Request Form as shown below.

Finapps Responsibility Request

Step 1: Select Employee

Employee Name 
Tip: Use wildcard '%' for quick search.
Example: %Smith% or %Mary%

Employee ID

Employee Name

Employee User Name

Employee Status

Assignment Category

Step 2: Select Action

Add Responsibility


Delete Responsibility

STEP 3: Select Employee

A) Enter the employee name that you will be requesting to delete access.

Note: Read the tip below the Employee Name on how to search for the employee.

Step 1: Select Employee

Employee Name  Search for the employee the access will be requested for

Tip: Use wildcard '%' for quick search.
Example: %Smith% or %Mary%

Employee ID

Employee Name

Employee User Name

Employee Status

Assignment Category



B) Click on the flash light  and the following page will appear:

Search and Select: Employee Name Cancel Select

Search
To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By

Results


Select	Quick Select	Full Name	Employee ID	User Name	Org Name
<input type="radio"/>		Lopez, Ms Elia Elizondo	70000401	XXUTPAELIA	Comptroller
<input type="radio"/>		Lopez, Ms Josefina	70000870	VALDEZ	Materials Management

Cancel Select

C) Click 'Quick Select' icon.

Note: Once the employee is selected, the fields 'Employee ID', 'Employee Name', 'Employee Username', 'Employee Status' and 'Assignment Category' will automatically populate.

Step 1: Select Employee

Employee Name 
Tip: Use wildcard '%' for quick search.
Example: %Smith% or %Mary%

Employee ID

Employee Name

Employee User Name

Employee Status

Assignment Category

STEP 4: Select Action

A) Select 'Delete Responsibility' action.

Step 2: Select Action

Add Responsibility
 Delete Responsibility

B) Click 'Next' to continue to Step 3.

The following page will appear:

UTPA UTPA Employee Self Service Main Menu

Home Logout Preferences

Back Review

Step 3: Delete Responsibilities For Lopez, Ms Josefina/70000870/Fulltime-Regular

Project Manager

Effective Date 28-May-2008

Tip: Use wildcard '%' for quick search.
Example: %Smith% or %Mary%

Active Responsibilities

Select All | Select None

Select Responsibility Name	Effective Start Date	Effective End Date
<input type="checkbox"/> UTPA GL Inquiry	31-Aug-2006	
<input type="checkbox"/> UTPA GL Security Define	02-Oct-2007	
<input type="checkbox"/> UTPA PAGMS Inquiry Only	20-Dec-2007	
<input type="checkbox"/> UTPA PO Training	02-May-2008	
<input type="checkbox"/> UTPA Payables Inquiry	04-Jan-2008	
<input type="checkbox"/> UTPA Purchasing Super User	04-Sep-2006	
<input type="checkbox"/> UTPA Receivables Department User	31-Aug-2006	
<input type="checkbox"/> XXEIS General Ledger Reports	18-Dec-2006	
<input type="checkbox"/> XXEIS Payables Reports	02-Oct-2007	
<input type="checkbox"/> XXEIS Purchasing Reports	02-Oct-2007	

Back Review

STEP 5: Select Project Manager

D) Enter Project Manager's name and click on the flash light to search for the name.

Note: Read the tip below the Project Manager for alternative ways on how to search for the project manager.

Step 3: Delete Responsibilities For Lopez, Ms Josefina/70000870/Fulltime-Regular

Project Manager

Effective Date 28-May-2008

Tip: Use wildcard '%' for quick search.
Example: %Smith% or %Mary%

Search and Select: Project Manager

Cancel Select

Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By

Results

Select	Quick Select	Full Name	Employee ID	User Name	Org Name
<input type="radio"/>		Dryer, Ms Norma Elizabeth	70001440	XXUTPADRYERN	Materials Management

Cancel Select

E) Click 'Quick Select' icon and the Project Manager's name will be populated.

F) Enter an 'Effective Date' for the responsibilities to be deleted.


STEP 6: Select Responsibilities

Active Responsibilities for the employee will be listed on this page.

Active Responsibilities		
Select All Select None		
Select Responsibility Name	Effective Start Date	Effective End Date
<input type="checkbox"/> UTPA GL Inquiry	31-Aug-2006	
<input checked="" type="checkbox"/> UTPA GL Security Define	02-Oct-2007	
<input type="checkbox"/> UTPA PA/GMS Inquiry Only	20-Dec-2007	
<input type="checkbox"/> UTPA PO Training	02-May-2008	
<input type="checkbox"/> UTPA Payables Inquiry	04-Jan-2008	
<input type="checkbox"/> UTPA Purchasing Super User	04-Sep-2006	
<input type="checkbox"/> UTPA Receivables Department User	31-Aug-2006	
<input type="checkbox"/> XXEIS General Ledger Reports	18-Dec-2006	
<input checked="" type="checkbox"/> XXEIS Payables Reports	02-Oct-2007	
<input type="checkbox"/> XXEIS Purchasing Reports	02-Oct-2007	

A) Select responsibilities and click on 'Review' button.

REVIEW PAGE

 UTPA Employee Self Service Main Menu [Home](#) [Logout](#) [Preferences](#)

[DeleteResponsibilities](#) > [Back](#) [Submit](#)

Review Delete For Lopez, Ms Josefina/70000870/Fulltime-Regular

Project Manager -- Dryer, Ms Norma Elizabeth

Effective Date -- 28-May-2008

Selected Responsibilities

Responsibilities	Effective Start Date	Effective End Date
XXEIS Payables Reports	02-Oct-2007	
UTPA GL Security Define	02-Oct-2007	

[Back](#) [Submit](#)


[Home](#) | [Logout](#) | [Preferences](#) [Privacy Statement](#)

Copyright (c) 2006, Oracle. All rights reserved.

B) Click 'Submit' button.

CONFIRMATION PAGE

You will receive a confirmation request number.

 UTPA Employee Self Service Main Menu [Home](#) [Logout](#) [Preferences](#)

Confirmation

Request ID #650 is submitted successfully [Done](#)

[Done](#)

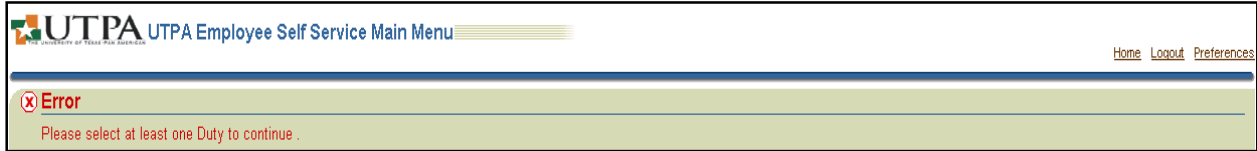
[Home](#) | [Logout](#) | [Preferences](#) [Privacy Statement](#)

Copyright (c) 2006, Oracle. All rights reserved.

VALIDATION/ERROR MESSAGES

No DUTY SELECTION

1. When no duty is selected, you will get the following validation error.

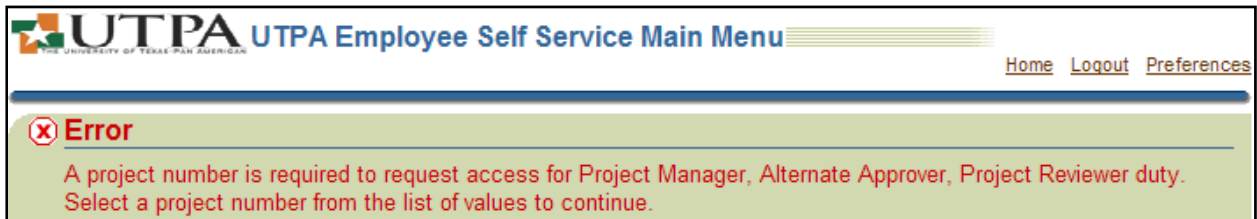


SOLUTION: Select at least one duty to continue with the request.

PROJECT MANAGER, ALTERNATE APPROVER, PROJECT REVIEWER

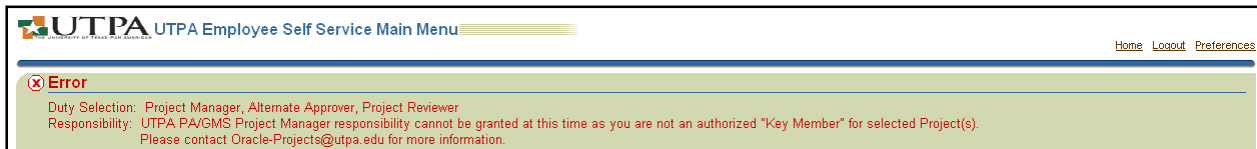
Duty: Project Manager, Alternate Approver, Project Reviewer UTPA PA/GMS Project Manager

1. When you select the duty 'Project Manager, Alternate Approver, Project Reviewer' and no project number is selected you will get the following validation error.



SOLUTION: Click on the 'Select Project' button and from the list of projects select the projects you need access to.

2. When you select the duty 'Project Manager, Alternate Approver, Project Reviewer' and you are not an authorized 'Key Member' on the project, you will get the following validation error.

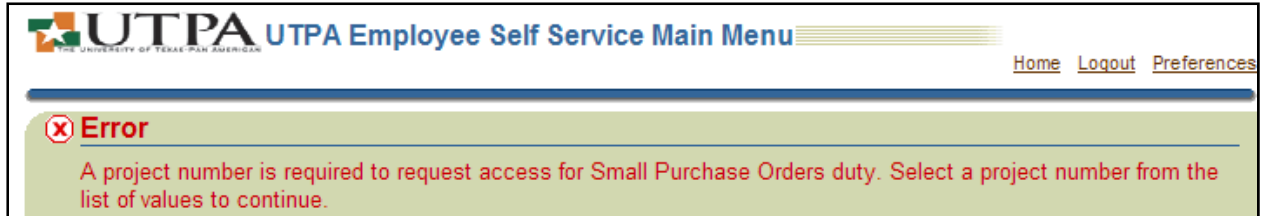


SOLUTION: Uncheck 'Project Manager, Alternate Approver, Project Reviewer' duty and email Oracle Projects at oracle-projects@utpa.edu with subject line 'Key Member Inquiry'.

SMALL PURCHASE ORDERS

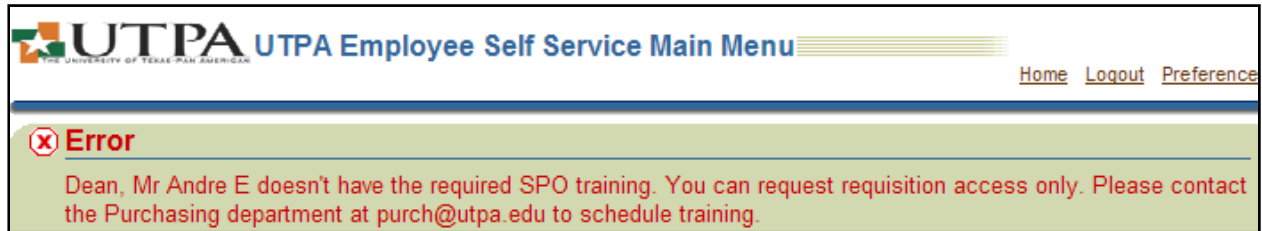
Duty: Small Purchase Orders * Responsibility will be generated based on project manager and project selected

1. When selecting 'Small Purchase Orders' and no project number is selected you will get the following validation error.



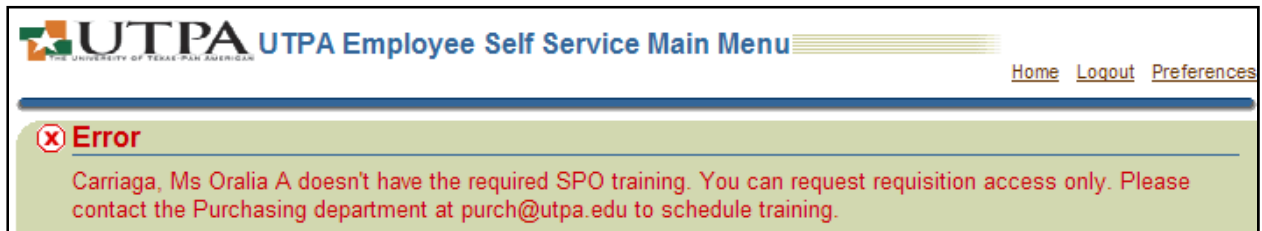
SOLUTION: Click on the 'Select Project' button and from the list of projects select the projects you need access to.

2. When selecting 'Small Purchase Orders' and the project manager does not have the required Small Purchase Order (SPO) training you will get the following validation error.



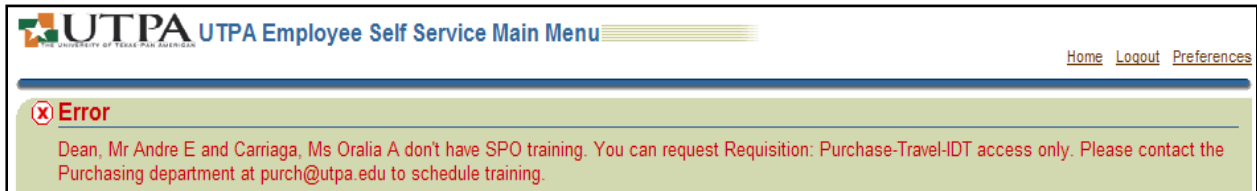
SOLUTION: Uncheck 'Small Purchase Order' duty and email Materials Management at purch@utpa.edu with subject line 'SPO Training' to schedule training. You can select 'Requisition: Purchase-Travel- IDT duty'.

3. When selecting 'Small Purchase Orders' and the employee does not have the required Small Purchase Order (SPO) training you will get the following validation error.



SOLUTION: Uncheck the duty and email Materials Management at purch@utpa.edu with subject line 'SPO Training' to schedule training. You can select 'Requisition: Purchase-Travel- IDT duty'.

- When selecting 'Small Purchase Orders' duty and both the employee and project manager do not have the required Small Purchase Order (SPO) training you will get the following validation error.



SOLUTION: Uncheck 'Small Purchase Order' duty and email Materials Management at purch@utpa.edu with subject message 'SPO Training' to schedule training. You can select 'Requisition: Purchase-Travel- IDT duty.

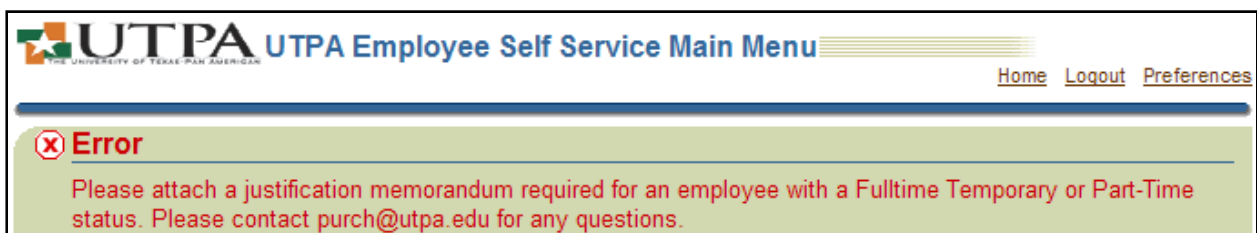
- When selecting 'Small Purchase Orders' duty and project manager has not submitted the required Small Purchase Order Authorization Agreement to Materials Management you will get the following validation error.



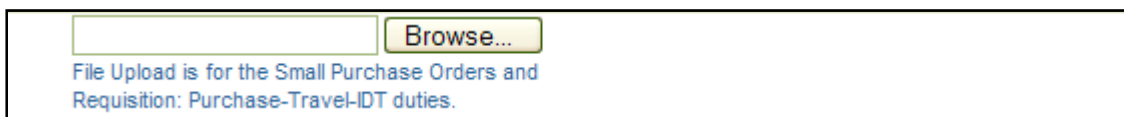
SOLUTION: Uncheck 'Small Purchase Order' duty and contact Materials Management at purch@utpa.edu with subject line of 'SPO Agreement'. You can select 'Requisition: Purchase-Travel- IDT duty and requisition access will be assigned.

SMALL PURCHASE ORDERS OR REQUISITION: PURCHASE-TRAVEL-IDT

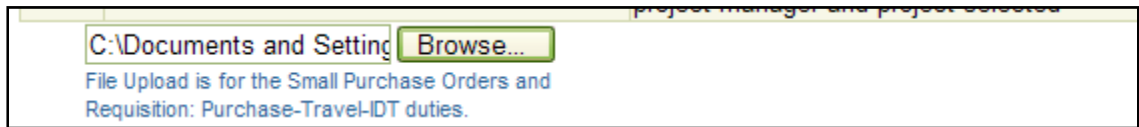
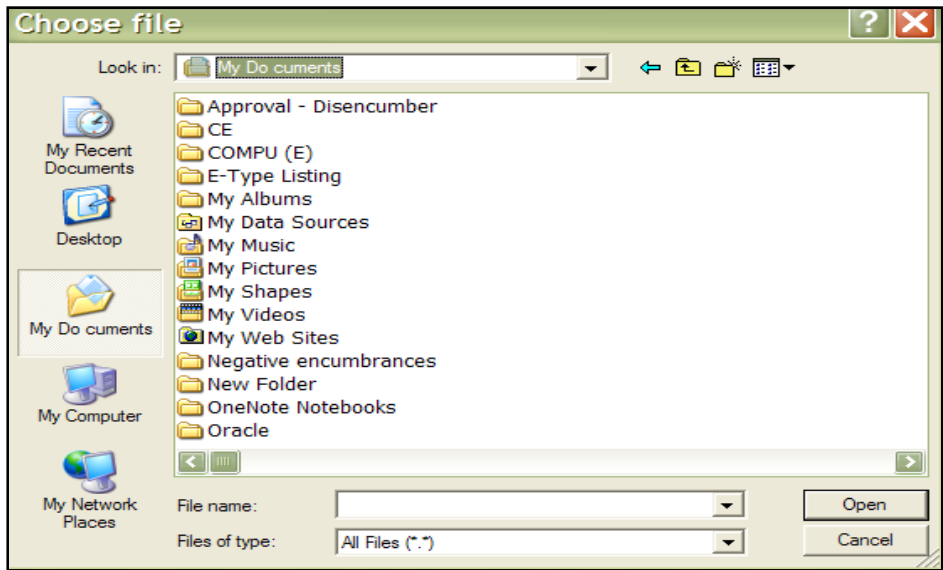
- When selecting 'Small Purchase Orders' or 'Requisition: Purchase-Travel-IDT' duty and the employee is a Fulltime Temporary or Part-Time you will get the following validation error if no justification is attached.



SOLUTION: Attach the scanned memo approved by the project manager on the following area.

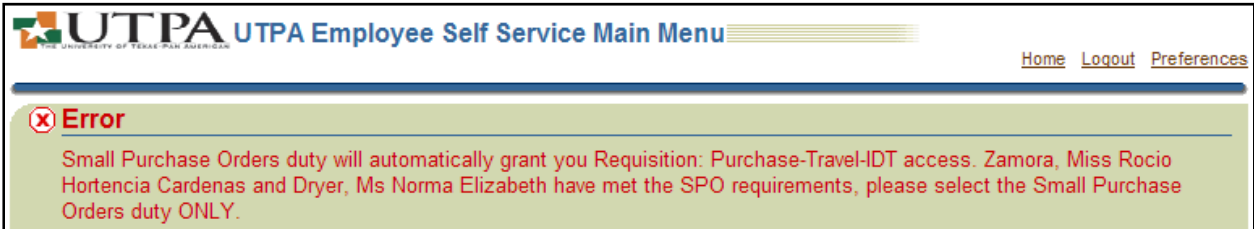


When you click on Browse you will see the screen below to select the file you need to attach. Once you select the file click on 'Open'.



Click on 'Review' again and your request should go through.

- 2. When selecting 'Small Purchase Orders' and 'Requisition: Purchase-Travel-IDT' duties on the same request you will get the following validation if both the employee and the project manager meet the SPO requirement.

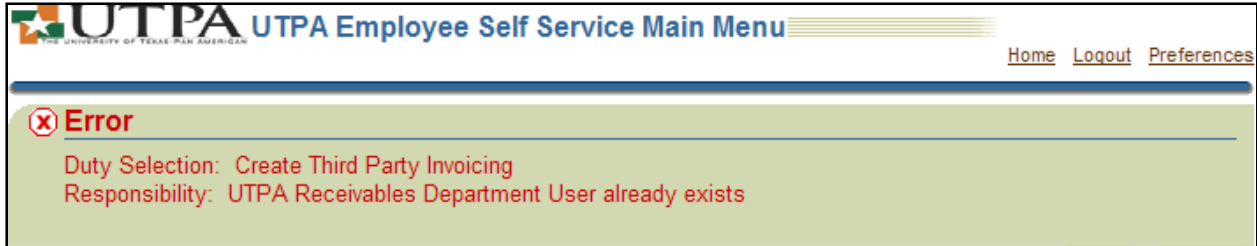


SOLUTION: Uncheck Requisition: Purchase-Travel-IDT duty only.

CREATE THIRD PARTY INVOICING

Duty: Create Third Party Invoicing UTPA Receivables Department User

1. When selecting 'Create Third Party Invoicing' duty and if it already exists in your current responsibilities you will get the following error validation.



SOLUTION: Uncheck the 'Create Third Party Invoicing' duty.

FUNDS/ACCOUNT INQUIRY

Duty: Funds/Account Inquiry UTPA GL Inquiry,XXEIS General Ledger Reports

1. When selecting 'Funds/Account Inquiry' duty and if it already exists in your current responsibilities you will get the following error validation.



SOLUTION: Uncheck the 'Funds/Account Inquiry' duty.

PROPERTY TRANSFERS/ASSET INVENTORY REPORT

Duty: Property Transfers/Asset Inventory Report UTPA Fixed Assets Inquiry,XXEIS Fixed Assets Reports

1. When selecting 'Property Transfers/Asset Inventory Report' duty and if it already exist in your current responsibilities you will get the following error validation.

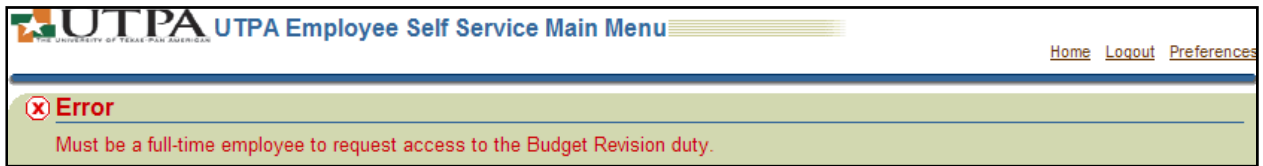


SOLUTION: Uncheck the 'Property Transfers/Asset Inventory Report' duty.

BUDGET REVISION

Duty: Budget Revision UTPA Budget User

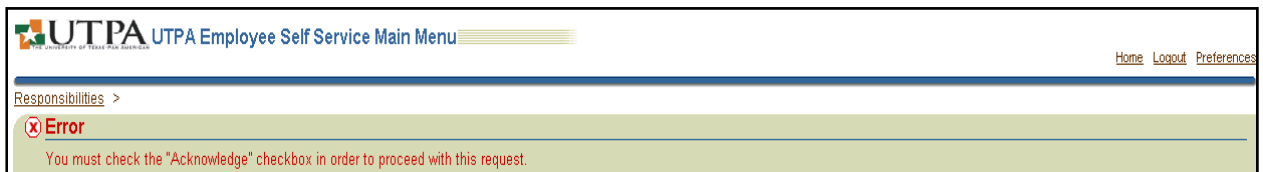
1. When selecting 'Budget Revision' duty and employee is not full time employee, you will get the following error validation.



SOLUTION: Uncheck the 'Budget Revision' duty.

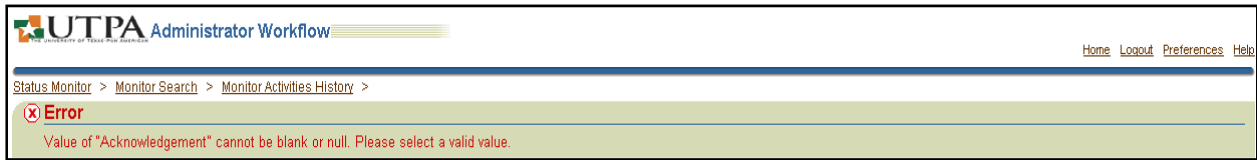
ACKNOWLEDGEMENT

1. If **User is the initiator** of the request and you do not check the acknowledgement checkbox, you will get the following error validation.



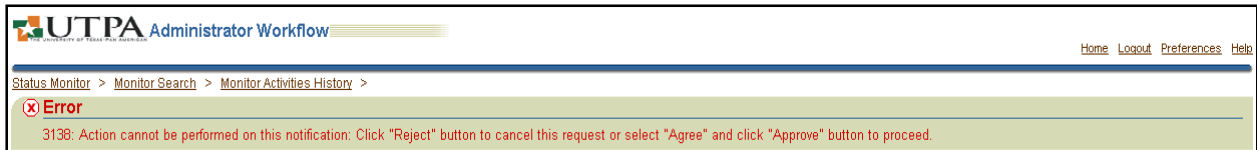
SOLUTION: Check the 'Acknowledgement' checkbox to submit the request.

2. If **User is not the initiator**, the acknowledgement information will appear in the approval notification. If acknowledgement dropdown is **left blank**, you will get the following error validation.



SOLUTION: Select 'Agree' or 'Do Not Agree' from the dropdown list to proceed with the request.

3. If **User is not the initiator**, the acknowledgement information will appear in the approval notification. If **'Do Not Agree'** is selected from the acknowledgement dropdown list, you will get the following error validation.



SOLUTION: Select 'Agree' from the dropdown list to proceed with the request or click on the 'Reject' button to cancel the request.

APPROVAL PROCESS

SCENARIO #1

If the Initiator of the Financial Responsibility request is not the employee getting the access, the approval process is the following:

1. Employee receives approval notification.
2. Project Manager receives approval notification.
3. Materials Management Director only receives approval notification for justification attached when the employee is Full-time Temporary or Part-time Temporary and has requested access to Small Purchase Orders or Requisition: Purchase-Travel-IDT.
4. Business Analyst receives approval notification depending on the duty selected.
5. Data Owner receives approval notification.
6. Information Technology Access Administration group receives request to assign the responsibilities to the employee. Once approved, the Initiator, Employee and Business Analyst will receive a FYI notification of responsibilities assigned.

SCENARIO #2

If the Initiator of the Financial Responsibility request is the employee getting the access, the approval process is the following:

1. Employee does not receive an approval notification.
2. Project Manager receives approval notification.
3. Materials Management Director only receives approval notification for justification attached when the employee is Full-time Temporary or Part-time Temporary and has requested access to Small Purchase Orders or Requisition: Purchase-Travel-IDT.
4. Business Analyst receives approval notification depending on the duty selected.
5. Data Owner receives approval notification.
6. Information Technology Access Administration group receives request to assign the responsibilities to the employee. Once approved, the Initiator, employee and Business Analyst will receive a FYI notification of responsibilities assigned.

SCENARIO #3

If the Project Manager is the Initiator of the Financial Responsibility request, the approval process is the following:

1. Employee receives approval notification.
2. Project Manager does not receive an approval notification.
3. Materials Management Director only receives approval notification for justification attached when the employee is Full-time Temporary or Part-time Temporary and has requested access to Small Purchase Orders or Requisition: Purchase-Travel-IDT.
4. Business Analyst receives approval notification depending on the duty selected.
5. Data Owner receives approval notification.

- Information Technology Access Administration group receives request to assign the responsibilities to the employee. Once approved, the Initiator, employee and Business Analyst will receive a FYI notification of responsibilities assigned.

EXAMPLES OF APPROVAL NOTIFICATIONS

Employee's approval notification



[Status Monitor](#) > [Monitor Search](#) > [Monitor Activities History](#) >

Please approve the responsibility request(#106) for Alanis, Ms Erika

To **Alanis, Erika**
 Sent **05-Jun-2008 12:52:56**
 ID **6342716**

Please review and approve the following request:

Project Manager : **Fredensborg, Dr Brian Lund**
 Employee Name : **Alanis, Ms Erika**
 Employee User Name : **XXUTPAEALANISZ6**
 Requestor Name : **Lopez, Ms Josefina**
 Assignment Category : **Parttime-Temporary**
 Responsibility Add/Delete : **Add**
 Effective Start Date : **05-JUN-2008**
 Employee SPO Training Date : **10-MAY-2008**
 PM SPO Training Date : **21-FEB-2008**
 PM SPO Training Agreement : **Yes**

Projects:

Project Number	Name	Organization Name
135BIOL04	FRC - Living on the Edge	Biology

Duties:

Responsibility	Module	Duty
UTPA BIOL Biology PO Fredensborg	Purchasing	Small Purchase Orders
UTPA GL Inquiry	General Ledger	Funds/Account Inquiry
UTPA Receivables Department User	Accounts Receivables	Create Third Party Invoicing
XXEIS General Ledger Reports	General Ledger	Funds/Account Inquiry

Approver History:

Seq No	Approver Name	Approver Role	Action Type	Approver Comments	Action Date
1	Alanis, Ms Erika	User			

Please read the following information carefully.

Acknowledgement of Regulations of University Information Resources

Project Manager's approval notification

[Status Monitor](#) > [Monitor Search](#) > [Monitor Activities History](#) >

Please approve the responsibility request(#105) for Alanis, Ms Erika

To **Granado, Esequiel**
Sent **05-Jun-2008 14:49:30**
Due **07-Jun-2008 14:49:30**
ID **6342718**

Please review and approve the following request:

Project Manager : **Granado, Mr Esequiel Jr**
Employee Name : **Alanis, Ms Erika**
Employee User Name : **XXUTPAEALANISZ6**
Requestor Name : **Lopez, Ms Josefina**
Assignment Category : **Parttime-Temporary**
Responsibility Add/Delete : **Add**
Effective Start Date : **05-JUN-2008**

Projects:

Project Number	Name	Organization Name
100CMPT08	Education Benefit Program	Comptroller

Duties:

Responsibility	Module	Duty
UTPA CMPT Comptroller REQ Granado	Purchasing	Requisition: Purchase-Travel-IDT

Approver History:

Seq No	Approver Name	Approver Role	Action Type	Approver Comments	Action Date
1	Alanis, Ms Erika	User	Approve		05-JUN-2008
2	Granado, Mr Esequiel Jr	Project Manager			

Response

Comments

Materials Management Director's approval notification

[Status Monitor](#) > [Monitor Search](#) > [Monitor Activities History](#) >

Please approve the responsibility request(#105) for Alanis, Ms Erika

To **Dryer, Norma**
 Sent **05-Jun-2008 14:52:51**
 Due **07-Jun-2008 14:52:51**
 ID **6342719**

Please review and approve the following request:

Project Manager : **Granado, Mr Esequiel Jr**
 Employee Name : **Alanis, Ms Erika**
 Employee User Name : **XXUTPAEALANISZ6**
 Requestor Name : **Lopez, Ms Josefina**
 Assignment Category : **Parttime-Temporary**
 Responsibility Add/Delete : **Add**
 Effective Start Date : **05-JUN-2008**

Projects:

Project Number	Name	Organization Name
100CMPT08	Education Benefit Program	Comptroller

Duties:

Responsibility	Module	Duty
UTPA CMPT Comptroller REQ Granado	Purchasing	Requisition: Purchase-Travel-IDT

Approver History:

Seq No	Approver Name	Approver Role	Action Type	Approver Comments	Action Date
1	Alanis, Ms Erika	User	Approve		05-JUN-2008
2	Granado, Mr Esequiel Jr	Project Manager	Approve		05-JUN-2008
3	Dryer, Ms Norma Elizabeth	Materials Management Director			

References

 [FILE_ATTACHMENT](#)

When Materials Management Director rejects

[Status Monitor](#) > [Monitor Search](#) > [Monitor Activities History](#) >

Information

This notification does not require a response.

FYI - Responsibility request(#105) for Alanis, Ms Erika has been rejected

To **Alanis, Erika**
 Sent **05-Jun-2008 14:55:13**
 ID **6342720**

The following request has been rejected.

Project Manager : **Granado, Mr Esequiel Jr**
 Employee Name : **Alanis, Ms Erika**
 Employee User Name : **XXUTPAEALANISZ6**
 Requestor Name : **Lopez, Ms Josefina**
 Assignment Category : **Parttime-Temporary**
 Responsibility Add/Delete : **Add**
 Effective Start Date : **05-JUN-2008**

Projects:

Project Number	Name	Organization Name
100CMPT08	Education Benefit Program	Comptroller

Duties:

Responsibility	Module	Duty
UTPA CMPT Comptroller REQ Granado	Purchasing	Requisition: Purchase-Travel-IDT

Approver History:

Seq No	Approver Name	Approver Role	Action Type	Approver Comments	Action Date
1	Alanis, Ms Erika	User	Approve		05-JUN-2008
2	Granado, Mr Esequiel Jr	Project Manager	Approve		05-JUN-2008
3	Dryer, Ms Norma Elizabeth	Materials Management Director	Reject		05-JUN-2008