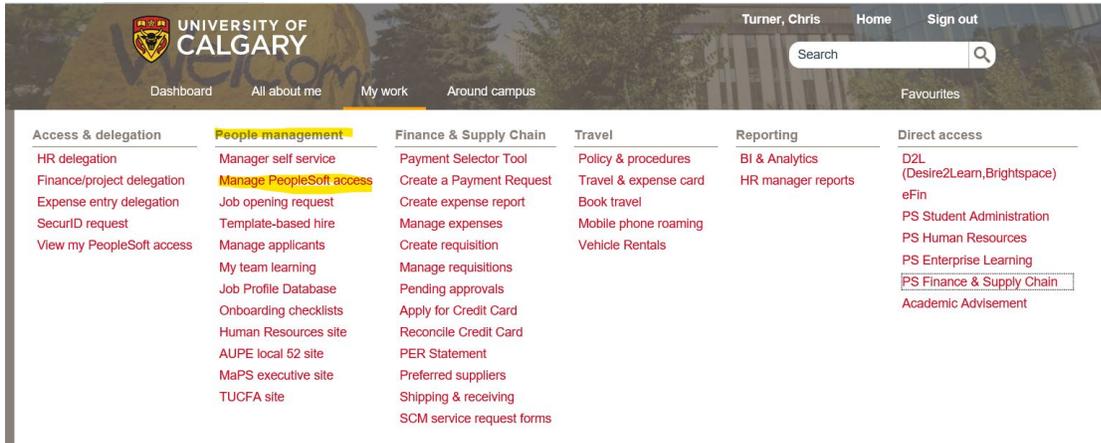




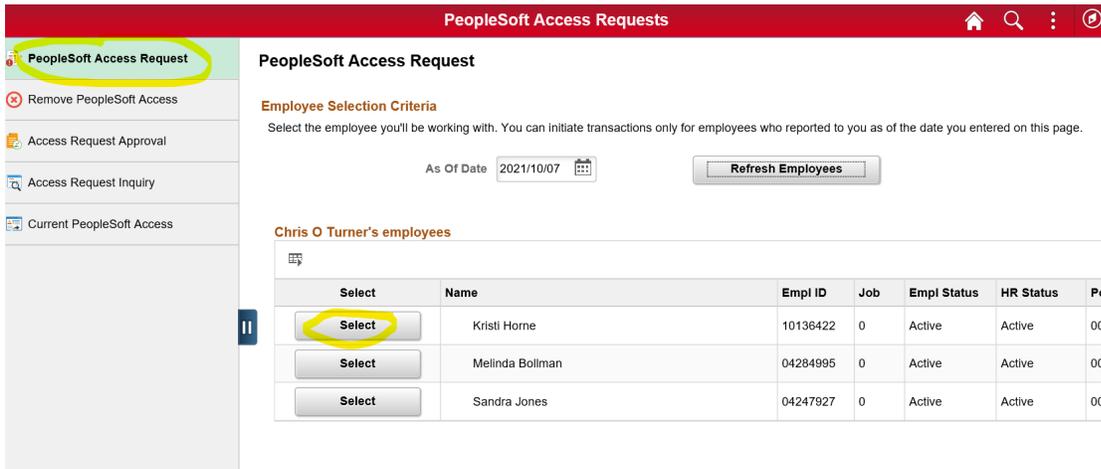
# Express Billing Requestor Role Job Aid

Important Note: The Express Billing Requestor Role must be requested by your Reports To Manager

1. Log into PeopleSoft and navigate to My work > Manage PeopleSoft Access



2. Select PeopleSoft Access Request and hit the select button for the employee needing access from the list of employees appearing



3. Select 'by category' under the Choose a Roleset Method Selection Method and click Continue

**PeopleSoft Access Request** Request ID NEXT

Review the selected individual's job information and current PeopleSoft access profile. Choose a method that you would like to use to select the roleset(s) for that individual, then click the **Continue** button.

Saved and pending requests for the selected individual are listed under the **Saved/Pending Requests** section. You can edit, submit or delete a saved request. You can cancel a pending request that is submitted by you through the **Access Request Approval** page.

EmpID: 10136422  
Name: Horne,Kristi

Expand the list if more than 5 rolesets have been provisioned.

**Current PeopleSoft Access Profile** Personalize | Find | View All | First 1-5 of 19 Last

Role Set	Description	SecurID Required	Request ID	Status	Begin Date	End Date
AP_INQUIRY	AP Inquiry	N	0000031051	Active	2019/03/25	
AP_NEPF_CLERK	AP NEPF Clerk	N	0000031051	Active	2019/03/25	
AP_PRF_VIEW_ONLY	AP PRF View Only	N	0000031051	Active	2019/03/25	
AP_SCANNING_ADMINISTRATOR	AP Scanning Administrator	N	0000031051	Active	2019/03/25	
AP_SCANNING_INQUIRY	AP Scanning Inquiry	N	0000031051	Active	2019/03/25	

Choose a Roleset Selection Method **by category** **Continue**

4. Click on the FSCM Restricted tab and expand Accounts Receivable Function-based Rolesets section

SA Registrar's Office | SA Other Offices | FSCM General | **FSCM Restricted** | HR General | HR Restr

**VP Finance and Supply Chain**

This section is for requesting access to PeopleSoft Finance and Supply Chain modules for employees and general associates reporting to the Finance Departments Only. This includes Integrated Service Center, Financial Operations, Financial Reporting, Research Accounting, Finance Services, Supply Chain Management, Treasury and Investments. If you are not an employee or a general associate in one of these areas please go to FSCM General (Finance Supply Chain Management for Faculties and Departments) tab.

**Accounts Payable Function-based Rolesets**

Instruction: If you are provisioning based on job, use the Position-based rolesets; if you are provisioning additional access or your initial position-based request was partially denied, you can select the rolesets based on Function.

▶

**Accounts Payable Position-based Rolesets**

Instruction: If you are provisioning based on job, use the Position-based rolesets; if you are provisioning additional access or your initial position-based request was partially denied, you can select the rolesets based on Function.

▶

**Accounts Receivable Function-based Rolesets**

Instruction: If you are provisioning based on job, use the Position-based rolesets; if you are provisioning additional access or your initial position-based request was partially denied, you can select the rolesets based on Function.

▶

**Accounts Receivable Position-based Roleset**

Instruction: If you are provisioning based on job, use the Position-based rolesets; if you are provisioning additional access or your initial position-based request was partially denied, you can select the rolesets based on Function.

▶

5. Select the Express Billing Requestor roleset

 **Express Billing Requestor** SecurID Required Y

This roleset provides the ability to enter bill request using Express billing, review billing and submit customer requests by using Customer Request Form.

6. After selecting the Express Billing Requestor role scroll down to the bottom, verify the Express Billing Requestor role is requested and then select CONTINUE

Requested Access			
	Description	Role Sub-Category	Role Category
1	Express Billing Requestor	Accounts Receivable Function-based Rolesets	VP Finance and Supply Chain



7. Scroll to the bottom of the next screen and select submit

List of Users for this Request Personalize | Find | First 1 of 1 Last

ID	Last Name	First Name	Org Relation	Empl Record	Additional Info
1			Employee	0	Additional Job and Security Profile Info

Request Effective Dates

\*Begin Date: 2021/11/05 End Date: [ ]

Requested Access				
Role Set	Description	Step-up Flag		
1 AR_EXPRESS_BILLING_REQUESTOR	Express Billing Requestor	Y		—

Additional Details Needed

Comments

Requestor Comments: [ ]

Save for Later **Submit**

Go to: [Access Request Inquiry](#) [Current PeopleSoft Access](#) [Remove PeopleSoft Access](#) [Access Request Approval](#) [Return to Select Employees](#) [Return to Roleset Selection Options](#)

8. You will get another screen asking you to confirm once you confirm then the workflow starts for this role

9. Access will be granted once it has been approved. You will be notified by automatic email