



Managing Employee Transfers and Terminations

TEM User Group webinar presented by University Payables
February 27, 2013



Introduction and Presenter

Tammy Ziegler
- University Payables





Agenda Topics

1. Determine Employee Roles in TEM
2. Pre-Termination Actions
3. Submit a Transfer/Terminate Request in the Security Application (SecApp)
4. Tips and Tricks
5. Question and Answer



1. Determine Employee Roles in TEM

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Accounting & Financial Reporting

Reports, Banner Account Codes, UFAS to Banner Crosswalks, Year-End Procedures, FCIAA, Reference Materials

Audit/Internal Controls

Employee & Supervisor Responsibility, Internal & External Audits

Budgeting

Budget Development Tips, Adjustment Requests, Budget Memo Log, Chicago Campus, Springfield Campus, Urbana-Champaign Campus


Business Development Services - UIC Only

Contract Types, OBDS Contract Process, HOT Topics, Contract Status, Newsletters


iBuy (online purchasing)

What's New, Overview, Get Started, Reporting, Training Resources, About the Project


P-Card

How To Get A P-Card, Generic Vendors, Rejected Transactions, Training,  P-Card Manual, Newsletters


Payments

Payments to Vendors, Payments to Students, Payments to Non-Employees (Honorarium), Employee Reimbursements, TEM Resources, Payables Processing Status 

Payments to Foreign Nationals

University Payroll Services,  Payment Eligibility Grid,

Log in to:

Choose the application 

Resources:

- [Banner Alerts & Resources](#)
- [OBFS Calendars](#)
- [Conferences](#)
- [Human Resources](#) 
- [i-card](#) 
- [Identity Theft \(Red Flags Rule\)](#)
- [OBFS Policies & Procedures Manual](#)
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- [Orientation for New Business and Finance Employees](#)
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Choose the application

- Choose the application
- All Applications
- ANA
- Banner
- DART
- EDDIE
- FABWeb
- HR FrontEnd
- iBuy
- NESSIE
- OBFS Employees Intranet
- P-Card
- PARIS
- PEAR
- Procurement Contracts Search
- TEM System
- UI Enterprise Applications
- UI eRA Portal
- UIUC CampusShip
- UIC CampusShip
- Unclaimed Bank Wires
- USC Security Application
- View Direct - Enterprise
- View Direct - Standard
- U of I Phonebook 
- Web Sites & Applications



- Enterprise View
- Document Direct and UI2 Report
- Medical Center Reports

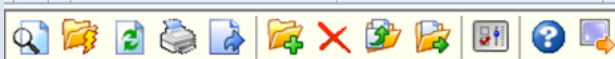
Document Direct and UI2 Report

Log in to Document Direct and UI2 Report

Enterprise ID:

Password:

☐ ☐ ☐



Enterprise View

Document Direct and UI2 Report

Topic

Report

- AM09091C0 MONTHLY UFAS STATEMENTS ACCOUNT 0
- AM09091C1 MONTHLY UFAS STATEMENTS ACCOUNT 1
- AM09091C2 MONTHLY UFAS STATEMENTS ACCOUNT 2
- AM09091C4 MONTHLY UFAS STATEMENTS ACCOUNT 4
- FI9ALAMAR ALAS MASS UPDATE REPORT - AUDIT
- FI9ALAMUC ALAS MASS UPDATE CONTROL TOTALS - UPDATE
- FI9ALAMUE ALAS MASS UPDATE ERRORLOG - UPDATE
- FI9ALAMUR ALAS MASS UPDATE REPORT - UPDATE
- FI9ALAPAR ALAS PURGE REPORT - AUDIT
- FI9ALAPUC ALAS PURGE CONTROL TOTALS - UPDATE
- FI9ALAPUE ALAS PURGE ERRORLOG - UPDATE
- FI9ALAPUR ALAS PURGE REPORT - UPDATE
- FI9ALASCD ASSESEMENTS AND ALLOCATIONS
- FI9ALASIC ASSESEMENTS AND ALLOCATIONS
- FIAGE18024 A/R DETAILED AGING INFORMATION 180-240 DAYS
- FIAGE3090 A/R DETAILED AGING INFORMATION 30-90 DAYS
- FIAGE36542 A/R DETAILED AGING INFORMATION 365-425
- FIAGE90150 A/R DETAILED AGING INFORMATION 90-150 DAYS
- FIARAEDCCS ATBE BY DETAIL CATEGORY CODE SUMMARY
- FIARAGDCCS AGING BY DETAIL CATEGORY CODE SUMMARY
- ...

Medical Center Reports



FIOPLEDGR9	FIGL DETAIL OPERATING LEDGER STATEMENT CHART 9
FIOPLEDGS1	FIGL SUMMARY OPERATING LEDGER STATEMENT...
FIOPLEDGS2	FIGL SUMMARY OPERATING LEDGER STATEMENT CHART 2
FIOPLEDGS4	FIGL SUMMARY OPERATING LEDGER STATEMENT CHART 4
FIOPLEDGS7	FIGL SUMMARY OPERATING LEDGER STATEMENT CHART 7
FIOPLEDGS9	FIGL SUMMARY OPERATING LEDGER STATEMENT CHART 9
FIOPLEITD1	FIGL ITD DETAIL OPERATING LEDGER STATEMENT CHART 1
FIOPLEITD2	FIGL ITD DETAIL OPERATING LEDGER STATEMENT CHART 2
FIOPLEITD4	FIGL ITD DETAIL OPERATING LEDGER STATEMENT CHART 4
FIOPLEITD7	FIGL ITD DETAIL OPERATING LEDGER STATEMENT CHART 7
FIOPLEITD9	FIGL ITD DETAIL OPERATING LEDGER STATEMENT CHART 9
FIOPLEITDS1	FIGL ITD SUMMARY OPERATING LEDGER STATEMENT CHART 1
FIOPLEITDS2	FIGL ITD SUMMARY OPERATING LEDGER STATEMENT CHART 2
FIOPLEITDS4	FIGL ITD SUMMARY OPERATING LEDGER STATEMENT CHART 4
FIOPLEITDS7	FIGL ITD SUMMARY OPERATING LEDGER STATEMENT CHART 7
FIOPLEITDS9	FIGL ITD SUMMARY OPERATING LEDGER STATEMENT CHART 9
UFASYTDCF	GGFAYTDC CHICAGO UFAS YTD FINAL
UFASYTDGF	GGFAYTDG CENTRAL ADMINISTRATION UFAS YTD FINAL
UFASYTDSF	GGFAYTDS SPRINGFIELD UFAS YTD FINAL
UFASYTDUF	GGFAYTDU URBANA UFAS YTD FINAL
USCFINANCE	Departmental User Access for Finance
USCFINAPP	USC User's Finance Approval Queues
USCHR	Departmental User Access for HR
USCHR	Departmental User Access for HR
USCHRORG	USC User HR Org Code Access
USCMSTORG	USC Users' Master HR ORG Code Access
USCSTUDENT	Departmental User Access for Student
USCSUMAPV	Departmental User Access Summary Report
USCTEM	USC TEM User Group Access
USCTEMCRG	USC TEM Charge Code Approver Access
USCVDRDIR	SEC ViewDirect User Direct Access Report
USCVDRGRP	SEC ViewDirect User Group Access Report
Medical Center Reports	

USC TEM User Group Access
USC TEM Charge Code Approver Access

Done

Trusted sites | Protected Mode: Off

uicore.uillinois.edu
Internet access

USC TEM User Group Access Report

Campus 900
 College 900/AF/OBFS - University Payables
 Department 900/698/OBFS - University Payables

FNAME	LNAME	UIN	ENTID	EMPL STATUS	TEM Account Status	TEM User Group	Headquarters	Manager Name	Manager UIN
Kim	A	65	ka	A	Active	All Users	Urbana-Champaign, IL	Mary	65
Kim	A	65	ka	A	Active	ER Done Administrators	Urbana-Champaign, IL	Mary	65
Michelle	B	65	su	A	Active	All Users	Urbana-Champaign, IL	James C Martinie	65
Michelle	B	65	su	A	Active	ER Done Administrators	Urbana-Champaign, IL	James C Martinie	65
Michelle	B	65	su	A	Active	ER: Employee Reimbursement Auditors	Urbana-Champaign, IL	James C Martinie	65
Michelle	B	65	su	A	Active	ER Exception Handling Administrators	Urbana-Champaign, IL	James C Martinie	65
Michelle	B	65	su	A	Active	ER: UPAY Auditors	Urbana-Champaign, IL	James C Martinie	65
Michelle	B	65	su	A	Active	Post-Pay Audit Group	Urbana-Champaign, IL	James C Martinie	65
Michelle	B	65	su	A	Active	Power Users	Urbana-Champaign, IL	James C Martinie	65
Michelle	B	65	su	A	Active	Pre-Pay Audit Group	Urbana-Champaign, IL	James C Martinie	65
Michelle	B	65	su	A	Active	USER: SAT Business Rules	Urbana-Champaign, IL	James C Martinie	65
Michelle	B	65	su	A	Active	USER: SAT Corp Data	Urbana-Champaign, IL	James C Martinie	65
Michelle	B	65	su	A	Active	USER: SAT ER/TP Data Types	Urbana-Champaign, IL	James C Martinie	65
Michelle	B	65	su	A	Active	USER: SAT Read Only	Urbana-Champaign, IL	James C Martinie	65
Michelle	B	65	su	A	Active	USER: SAT User Info	Urbana-Champaign, IL	James C Martinie	65

USC TEM Charge Code Approver Access Report

Campus 900
College 900/AF/OBFS - University Payables
Department 900/698/OBFS - University Payables

Last Name	First Name	UIN	Enterprise ID	Employment Status	Role	Chart	Org	Role Start Date
E	Sandra	6	s	Active	TEMACCR-Alternate Charge Code Approver	9	107000	1/1/2011
E	Sandra	6	s	Active	TEMACCR-Alternate Charge Code Approver	9	107000	1/1/2012
E	Sandra	6	s	Active	TEMACCR-Alternate Charge Code Approver	9	698000	9/20/2011
W	Sheila	6	s	Active	TEMCCR-Charge Code Approver	9	107000	1/1/2011
W	Sheila	6	s	Active	TEMCCR-Charge Code Approver	9	107000	1/1/2012
W	Sheila	6	s	Active	TEMCCR-Charge Code Approver	9	698000	9/20/2011



2. Pre-Termination Actions

Pre-Termination Actions

- Manager or Charge Code Reviewer
- Update information in SecApp
- Outstanding t-card transactions
 - Should be reconciled
 - Before termination request
- Not a Manager or Charge Code Reviewer
 - Skip pre-termination



Pre-Termination Actions

- Update a TEM manager in SecApp
- Mass update feature
- Name and UIN
 - Old manager
 - New manager



- User session was expired, redirected to home page.

Logged on is user1

WELCOME to the University of Illinois Security Application Website! The Security Application is a central location for University employees to request and authorize access to various University applications. The Security Application supports creates, deletes, and updates of security privileges.

Primary sections of the Security Application include:

[Initiate Request](#) - Allows any University employee identified as a Unit Security Contact to initiate a security request. Only employees identified as Unit Security Contact can initiate security requests (instructions on using the Security Application can be found on the USC website).

[Authorize Request](#) - Allows any University employee identified as an Authorizer to authorize security requests. Authorizers can only authorize security requests to applications for which they are responsible. Only employees identified as Authorizer can authorize security requests. ([Security Application Instructions for Authorizers](#))

[Search Requests](#) - Search requests by Enterprise ID or UIN.

[Security Browser](#) - View existing security access by Enterprise ID or UIN.

[FY13 Access Review](#) - Mandatory User Access Review for Fiscal Year 2013

If you have any questions regarding the UI Security Request Form, please contact the [AITS Service Desk](#). AITS Service Desk phone numbers are (217) 333-3102 for UIUC and UIS, and (312) 996-4806 for UIC.



UI-Integrate Access Request Form

USC Name: **user1**

USC Email Address: **kcarlso1@illinois.edu.xxxyyyzzz**

Request Date: **02/10/2013**

USC Department Information

Please select the appropriate Campus, College and Department. The Campus, College and Departments available are those that the USC is allowed to make requests for and indicate which department made the request. The selected Campus will determine who authorizes the request.

Campus: **UIUC - Champaign/Urbana** ▼ *

College / Department: **NB** ▼ / **223** ▼ *

Account Owner Information

Please enter UIN and click Retrieve. Invalid UIN requests will not be processed.

Account Owner Information

Please enter UIN and click Retrieve. Invalid UIN requests will not be processed.

UIN:

Retrieve

Important: The following information is required by USC

- * ☐ Yes, I have confirmed the department has a signed copy of the [Information Security Compliance Form](#) on file.
- * ☐ I have reviewed and updated all Security Collection Information requested herein. I have shared and received approval from my Campus Unit Head, or his/her designee to provide this information to AITS Security and/or the authorizers.
- ☐ Account Owners must receive training before using any portion of the UI-Integrate system. If requesting access to the UI-Integrate system, please acknowledge that the Account Owner has received the appropriate training by selecting the checkbox.

Important: All fields with an asterisk * are required information for the Account Owner. Requestor/Supervisor is the manager or other individual who has approved the account owner's request for security.

Enterprise ID:

Name:

Email Address:

Job Title:

Phone Number:

Employment Status:

Important: The following information is required by USC

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- * ☐ I have reviewed and updated all Security Collection Information requested herein. I have shared and received approval from my Campus Unit Head, or his/her designee to provide this information to AITS Security and/or the authorizers.
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Important: All fields with an asterisk * are required information for the Account Owner. Requestor/Supervisor is the manager or other individual who has approved the account owner's request for security.

Enterprise ID: **agoodrum**

Name: **Autumn E Goodrum**

Email Address: **agoodrum@illinois.edu**

Job Title: **ASST DIR UNIV PAYABLES**

Phone Number: **(217) 333-9096**

Employment Status: **Active**

Supervisor Name: *

* Does Account Owner require access to data across ALL campuses? **No** ▼

Important: Selecting Yes will cause the request to be delayed or denied if the Account Owner does not require this access.

Note: If the Account Owner is University Administration, Financial Aid, or MRRT (Multiple Records Resolution Team), then they probably need multi-campus access.

Active Date: **--SELECT--** ▼ ▼ Unless specified, request will be processed as soon as possible

- ☐ **TERMINATED or TRANSFER EMPLOYEES:** If this Account Owner is no longer a University employee or has transferred into another department, and departmental access to the UI-Integrate System needs to be removed, please select this checkbox. You will be notified when access for this account owner has been removed.

Continue



Modules

[UI Finance](#)[UI HR-Pay](#)[UI Student](#)[Contract Mgt](#)[Cross Module Profiles](#)[HR Front End](#)[Other Applications](#)[PARIS](#)[TEM](#)[Reports-Finance](#)[Reports-HR-Pay](#)[Reports-Student](#)[View/Submit Request](#)

Security Main Menu

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[UI Finance](#) - Collects information necessary to enroll users in the UI-Integrate Finance and iBuy Systems.

[UI HR-Pay](#) - Collects information necessary to enroll users in the UI-Integrate Human Resource and/or Payroll Systems.

[UI Student](#) - Collects information necessary to enroll users in the UI-Integrate Student System

[Contract Mgt](#) - Profiles dealing with access to the Contract Management System (Prodagio)

[Cross Module Profiles](#) - Profiles which are used for more than one module (Student, Finance, HR). These profiles require authorization from the cross-functional team.

[HR Front End](#) - Profiles dealing with access to the HR Front End application.

[Other Applications](#) - Non UI-Integrate applications. Currently, includes profiles for PRMS and PHD/COS access.

[PARIS](#) - Profiles that are appropriate for users who need to process Current Pay Period Adjustments.

[TEM](#) - Profiles dealing with access to the Travel and Expense Management (TEM) system.

[Reports-Finance](#) - Reports associated with the UI-Integrate Finance System.

[Increments](#)[Required TEM Setup](#)[Charge Code Reviewer](#)[General Users](#)[Power Users](#)

TEM Security

ATTENTION USC: You must request the REQUIRED TEM PROFILE before requesting any other TEM access if user doesn't have TEM access.

This section contains all TEM Security profiles, grouped together by type. The types of TEM Security, as listed in the left margin, include:

[Required TEM Setup](#) - Profile required for TEM Access

[Charge Code Reviewer](#) - Charge Code Reviewer Profiles

[General Users](#) - General User Profiles

[Power Users](#) - Power User Profiles

If you have any questions regarding the UI Security Request Form, please contact the [AITS Service Desk](#). AITS Service Desk phone numbers are (217) 333-3102 for UIUC and UIS, and (312) 996-4806 for UIC. Comments regarding the UI Security Request form can be forwarded to [AITS Security](#)

University of Illinois, Office of Administrative Information Technology Services (AITS)

[Increments](#)[Required TEM Setup](#)[Charge Code Reviewer](#)[General Users](#)[Power Users](#)

General Users

ATTENTION USC: You must request the **REQUIRED TEM PROFILE** before requesting any other TEM access if user doesn't have TEM access.

Note:

You must save your selection by clicking the Save button before proceeding to another screen. If you do not click the Save button, all selections will be lost.

Profile Name <small>Double Click on the profile name to see info about the profile</small>	Authorizer Comments	Current Access	Action	Settings <small>* = Required</small>
General Users		<input type="checkbox"/>	<input type="text"/>	
Mass Change TEM Manager		<input type="checkbox"/>	<input type="text"/>	Replace TEM Manager*

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Mass Change TEM Manager Settings

ATTENTION USC: You must request the REQUIRED TEM PROFILE before requesting any other TEM access if user doesn't have TEM access.

Note: You must save your selection by clicking the Save button before proceeding to another screen. If you do not click the Save button, all selections will be lost.

You have selected a profile that has required or optional settings. Please make the following selections.

TEM will not allow a user to be his/her own approver, it will keep the original manager.

Replace TEM Manager (required)

Old Manager UIN

Save

Profiles



- Settings saved successfully.

Mass Change TEM Manager Settings

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Old Manager UIN

Save

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Security Request Summary

Please review this University Security request. Selecting Submit will automatically forward the request to the appropriate source. You will receive notification when the requested access has been granted.

Disclaimer:

For UI Integrate Security requests, this form emails requests directly to UI Integrate Authorizers. Upon approval, the authorizer will send the request to AITS Security and the access will be granted. AITS Security does not receive a copy of the unapproved request. It is the job of the USC to follow-up with UI Integrate Authorizers if a submitted request is not approved.

USC Name: **lrutledg**
USC Email Address: **lrutledg@illinois.edu**
Request Date: **02/12/2013**

Account Owner Information

Name:	Autumn E Goodrum	Campus:	UIUC - Champaign/Urbana
Enterprise ID:	agoodrum	College / Dept:	NE / 681
UIN:	655297198	Employment Status:	
Job Title:	ASST DIR UNIV PAYABLES	Active Date:	
Phone Number:	(217) 333-9096		
Supervisor Name:	test		

TEM Security Request

General Users

Authorizer: **No Authorization Required**
Email:
Phone Number:

Profile Name	Auth	Action
<small>Double Click on the profile name to see info about the profile</small>		
Mass Change TEM Manager	No	Add ▾
Replace TEM Manager: 650309741 (James Martinie)		Add



Pre-Termination Actions

- Update Charge Code Reviewers
- Need name and UIN
 - Charge Code Reviewer



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Charge Code Reviewer

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Note:

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Profile Name <small>Double Click on the profile name to see info about the profile</small>	Authorizer Comments	Current Access	Action	Settings <small>* = Required</small>
Charge Code Reviewer		<input type="checkbox"/>	<input type="text" value="v"/>	Organization Access*

Save

View/Submit Request

If you have any questions regarding the UI Security Request Form, please contact the [AITS Service Desk](#). AITS Service Desk phone numbers are (217) 333-3102 for UIUC and UIS, and (312) 996-4806 for UIC. Comments regarding the UI Security Request form can be forwarded to [AITS Security](#)

**Increments**[Required TEM Setup](#)[Charge Code Reviewer](#)[General Users](#)[Power Users](#)

Charge Code Reviewer Settings

ATTENTION USC: You must request the **REQUIRED TEM PROFILE** before requesting any other TEM access if user doesn't have TEM access.

Note: You must save your selection by clicking the Save button before proceeding to another screen. If you do not click the Save button, all selections will be lost.

You have selected a profile that has required or optional settings. Please make the following selections.

ATTENTION USC: If you are adding a person as Charge Code Reviewer and one is already set up, they will be deleted as the Charge Code Reviewer from Banner. There can only be one primary charge code reviewer and one alternate charge code reviewer per chart/org.

Organization Access (required)

Chart Of Accounts	Organization	User Type	Action
--SELECT--	--SELECT--	--SELECT--	

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Security Request Summary

Please review this University Security request. Selecting Submit will automatically forward the request to the appropriate source. You will receive notification when the requested access has been granted.

Disclaimer:

For UI Integrate Security requests, this form emails requests directly to UI Integrate Authorizers. Upon approval, the authorizer will send the request to AITS Security and the access will be granted. AITS Security does not receive a copy of the unapproved request. It is the job of the USC to follow-up with UI Integrate Authorizers if a submitted request is not approved.

USC Name: user1
USC Email Address: kcarlso1@illinois.edu.xxyyyzzz
Request Date: 02/19/2013

Account Owner Information

Name: Autumn E Goodrum
Enterprise ID: agoodrum
UIN: 655297198
Job Title: ASST DIR UNIV PAYABLES
Phone Number: (217) 333-9096
Supervisor Name: adf

Campus: UIUC - Champaign/Urbana
College / Dept: NB / 223
Employment Status:
Active Date:

TEM Security Request

Charge Code Reviewer

Authorizer: No Authorization Required
Email:
Phone Number:

Profile Name <small>Double Click on the profile name to see info about the profile</small>		Auth	Action
<u>Charge Code Reviewer</u>		No	Add ▼
UA (Central Admin)	699000	TEM Primary Charge Code reviewer	
		Add	



Request Submitted

The authorizers you have chosen have been contacted regarding the profiles requested.

You have been copied on all emails sent.

If you have any questions, concerns or problems, please send email to AITS Security at aazsecu@uillinois.edu.

Thank you for using the AITS Security UI Integrate Production Access Request Form.

[Continue](#)

If you have any questions regarding the UI Security Request Form, please contact the [AITS Service Desk](#). AITS Service Desk phone numbers are (217) 333-3102 for UIUC and UIS, and (312) 996-4806 for UIC.

Comments regarding the UI Security Request form can be forwarded to [AITS Security](#)



Pre-Termination Actions

- If employee is leaving and is t-card holder:
 - Notify UPAY Card Services
 - Department Card Manager (DCM)
 - Reconcile all outstanding transactions
 - Relinquish t-card to DCM
- DCM
 - Cancel and destroy t-card
 - Contact UPAY Card Services



3. Submit a Termination Request in the SecApp



- User session was expired, redirected to home page.

Logged on is user1

WELCOME to the University of Illinois Security Application Website! The Security Application is a central location for University employees to request and authorize access to various University applications. The Security Application supports creates, deletes, and updates of security privileges.

Primary sections of the Security Application include:

[Initiate Request](#) - Allows any University employee identified as a Unit Security Contact to initiate a security request. Only employees identified as Unit Security Contact can initiate security requests (instructions on using the Security Application can be found on the USC website).

[Authorize Request](#) - Allows any University employee identified as an Authorizer to authorize security requests. Authorizers can only authorize security requests to applications for which they are responsible. Only employees identified as Authorizer can authorize security requests. ([Security Application Instructions for Authorizers](#))

[Search Requests](#) - Search requests by Enterprise ID or UIN.

[Security Browser](#) - View existing security access by Enterprise ID or UIN.

[FY13 Access Review](#) - Mandatory User Access Review for Fiscal Year 2013

If you have any questions regarding the UI Security Request Form, please contact the [AITS Service Desk](#). AITS Service Desk phone numbers are (217) 333-3102 for UIUC and UIS, and (312) 996-4806 for UIC.



UI-Integrate Access Request Form

USC Name: **user1**

USC Email Address: **kcarlso1@illinois.edu.xxxyyyzzz**

Request Date: **02/10/2013**

USC Department Information

Please select the appropriate Campus, College and Department. The Campus, College and Departments available are those that the USC is allowed to make requests for and indicate which department made the request. The selected Campus will determine who authorizes the request.

Campus: **UIUC - Champaign/Urbana** ▼ *

College / Department: **NB** ▼ / **223** ▼ *

Account Owner Information

Please enter UIN and click Retrieve. Invalid UIN requests will not be processed.

Account Owner Information

Please enter UIN and click Retrieve. Invalid UIN requests will not be processed.

UIN:

Important: The following information is required by USC

- * ☐ Yes, I have confirmed the department has a signed copy of the [Information Security Compliance Form](#) on file.
- * ☐ I have reviewed and updated all Security Collection Information requested herein. I have shared and received approval from my Campus Unit Head, or his/her designee to provide this information to AITS Security and/or the authorizers.
- ☐ Account Owners must receive training before using any portion of the UI-Integrate system. If requesting access to the UI-Integrate system, please acknowledge that the Account Owner has received the appropriate training by selecting the checkbox.

Important: All fields with an asterisk * are required information for the Account Owner. Requestor/Supervisor is the manager or other individual who has approved the account owner's request for security.

Enterprise ID:

Name:

Email Address:

Job Title:

Phone Number:

Employment Status:

Important: The following information is required by USC

- * ☐ Yes, I have confirmed the department has a signed copy of the [Information Security Compliance Form](#) on file.
- * ☐ I have reviewed and updated all Security Collection Information requested herein. I have shared and received approval from my Campus Unit Head, or his/her designee to provide this information to AITS Security and/or the authorizers.
- ☐ Account Owners must receive training before using any portion of the UI-Integrate system. If requesting access to the UI-Integrate system, please acknowledge that the Account Owner has received the appropriate training by selecting the checkbox.

Important: All fields with an asterisk * are required information for the Account Owner. Requestor/Supervisor is the manager or other individual who has approved the account owner's request for security.

Enterprise ID: **agoodrum**

Name: **Autumn E Goodrum**

Email Address: **agoodrum@illinois.edu**

Job Title: **ASST DIR UNIV PAYABLES**

Phone Number: **(217) 333-9096**

Employment Status: **Active**

Supervisor Name: *

* Does Account Owner require access to data across ALL campuses? **No** ▼

Important: Selecting Yes will cause the request to be delayed or denied if the Account Owner does not require this access.

Note: If the Account Owner is University Administration, Financial Aid, or MRRT (Multiple Records Resolution Team), then they probably need multi-campus access.

Active Date: **--SELECT--** ▼ ▼ Unless specified, request will be processed as soon as possible

- ☐ **TERMINATED or TRANSFER EMPLOYEES:** If this Account Owner is no longer a University employee or has transferred into another department, and departmental access to the UI-Integrate System needs to be removed, please select this checkbox. You will be notified when access for this account owner has been removed.

Continue



- You have selected the 'TERMINATE/TRANSFER Employee' checkbox. Please click the Confirm button to submit this Terminate/Transfer request. Otherwise, click Cancel.

WARNING:

You have selected the 'TERMINATE/TRANSFER Employee' checkbox. Please click the Confirm button to submit this Terminate/Transfer request. Otherwise, click Cancel

UI-Integrate Access Request Form

USC Name: **user1**

USC Email Address: **kcarlso1@illinois.edu.xxxyyyzzz**

Request Date: **02/12/2013**

USC Department Information

Please select the appropriate Campus, College and Department. The Campus, College and Departments available are those that the USC is allowed to make requests for and indicate which department made the request. The selected Campus will determine who authorizes the request.

Campus: *

College / Department: / *

Account Owner Information



- agoodrum - This account has successfully been requested to be removed.

UI-Integrate Access Request Form

USC Name: **user1**

USC Email Address: **kcarlo1@illinois.edu.xxyyyzzz**

Request Date: **02/12/2013**

USC Department Information

Please select the appropriate Campus, College and Department. The Campus, College and Departments available are those that the USC is allowed to make requests for and indicate which department made the request. The selected Campus will determine who authorizes the request.

Campus: **UIUC - Champaign/Urbana** ▼ *

College / Department: **NB** ▼ / **223** ▼ *

Account Owner Information

Please enter UIN and click Retrieve. Invalid UIN requests will not be processed.

UIN:

Important: The following information is required by USC

* ☐ Yes, I have confirmed the department has a signed copy of the Information Security Compliance Form on file.



4. Tips and Tricks



Tips and Tricks

- General User
 - One proxy creator
- Manager and Charge Code Reviewer
 - One proxy reviewer

Tips and Tricks

- USCs start termination process
- User leaving unit in advance
 - No pending TEM transactions
 - Reconcile all t-card transactions
- User has left
 - Pending documents or unreconciled transactions
 - Notify temhelp@uillinois.edu
 - Name, UIN, and ER numbers



Tips and Tricks

- Mass change manager function
 - One-to-one basis



Manager



New manager



Tips and Tricks

- Mass change
- Assigned as their own manager
- Not allow
 - Approve their own documents
- Manager manually updated in SecApp

Tips and Tricks

- No transfer protocol
 - Leaving one unit to go to another
- All permissions terminated
 - Employee transfers to new unit
 - Leaves the University
- Termination requests in the SecApp
 - Terminate all permissions
- SecApp questions
 - aitsservicedesk@uillinois.edu



5. Question and Answer



**Thank you for
attending!**