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CU I&E Submission: HRMS Electronic Access Request Form [1]

Description

Previously, HRMS PeopleSoft access was requested using a very complicated form. This form was somewhat confusing for many employees, as it presented an array of options for all levels of HR access, requiring users to weed through information that didn't necessarily pertain to them. Many users would "over-request," and select access they thought they might need. It was then up to the Security Coordinators to determine if the user needed everything that was requested based on the user's job requirements and position.

Because of these issues, I developed a new online interactive HRMS access request form that simplifies the approval process for requesters, supervisors, HRMS security coordinators and UIS provisioning. The form presents only the appropriate role information based on the job prompts that HRMS PeopleSoft users select.

User/requesters must first identify the type of User Set-Up they are requesting. The selected check box triggers the form to build and display only the roles available under that category of set-up. This saves the requester/user, supervisor and security coordinator much time scrutinizing the non-pertinent information that the old form presented. For instance, if a requester simply wants to Copy HRMS roles from an existing user, the form doesn't present the entire list of role categories, as it would for a New User request. Instead, it prompts role categories for only the User ID the requester wishes to copy. This same "smart" methodology is utilized throughout the form to display to users only what they need to complete their requests.

The electronically-created form can build from 2 pages to 9 pages depending on the HRMS access needed by the user. In addition, individual fields within those pages are generated depending on radio buttons or boxes selected. For example, a box for Access to Additional Departments reveals a text box for the user to fill in. Otherwise, this text box stays invisible to the form.

For a live look at the Human Resource System Access Request Form enter the following link in your Internet Explorer browser:

https://content.cu.edu/ums/security/CUonly/AMPS/Forms/HRMS-Access-Req.pdf [2]

HOW DOES THIS IMPACT THE UNIVERSITY?

The entire HRMS PeopleSoft Access process for System was streamlined and clarified as part of this form project. Role names and Access naming were standardized between

departments.

This new form also identifies the training requirements for HRMS roles, and includes role descriptions and responsibilities to help educate requesters on the use of these roles.

The new form modeled the format of the Finance Access Request Form that was introduced 6 months before, giving FIN and HR users a sense of cohesion in requesting access.

The electronic form minimizes paper waste; use of this more efficient online interactive form eliminates the need to print a hard copy to review all the options of the form. Offering a more efficient method online also saves valuable time processing and moving the form electronically for electronic signature approvals.

IMPLEMENTATION STATUS

I saw a need for the revision of this form and voluntarily built it for University Information Services (UIS). The form has been in use by all System employees since May 2013.

Groups audience:
Controller

Source URL:https://www.cu.edu/controller/i-e-awards/past-submissions/cu-ie-submission-hrms-electronic-access-request-form

Links
[1] https://www.cu.edu/controller/i-e-awards/past-submissions/cu-ie-submission-hrms-electronic-access-request-form [2] http://https://content.cu.edu/ums/security/CUonly/AMPS/Forms/HRMS-Access-Req.pdf