



Third Thursday Demo

# How To Audit PeopleSoft Security and Why You Should

Presented by SDCOE CRC | March 15, 2018



**SAN DIEGO COUNTY**  
OFFICE OF EDUCATION

CUSTOMER RESOURCE CENTER

# Why audit PeopleSoft security?

Your organization is responsible for its PeopleSoft users. Conduct an audit of security for the following reasons:

- To know which employees (users) have access to which information.
- To identify if any changes need to be made to users' roles (addition/removal).
- To ensure that terminated employees do not have roles assigned.



# Topics

- Understanding Users & Roles
- Security for New Hires and Terminations
  - Does your organization have a process in place to review a new hire's roles (inherited from another PeopleSoft organization)?
  - Does your organization have a process to request that roles are removed when an employee is terminated?
- Performing a Security Audit
  - Which PeopleSoft HCM and Finance roles does each employee have?
  - Who can see SSNs?
  - Who can perform password resets?
  - Who has SecureAuth (VPN) access?
  - Are any users locked out?





# Understanding Users & Roles

How users are created, basic roles, identifying users' roles



## KEY

 = District

 = CRC

# How Users Are Created

Enter job data in HCM.

## 1:00 AM: FOR EMPLOYEES WITH NO USER ID

The M\_HR\_CRT\_ID job runs nightly at 1 am to create the basic user profile and assign the M\_EMPLOYEE role.

- User ID – Pulls from Personal Information
- Description – Pulls from Personal Information
- Email address – Pulls from Personal Information
- Assigns M\_EMPLOYEE role and Primary Permission List (district #)
- Assigns the default temp password (First 4 of LAST NAME IN CAPS + Last 4 of SSN)

## 1:15 AM: FOR ALL ACTIVE EMPLOYEES

The DYNROLE\_PUBL process runs at 1:15 am for all active employees and assigns the M\_EE\_XXX role (where XXX is the district #).

- NOTE: After the 1:00 and 1:15 processes, a new employee can log into PeopleSoft ESS (to view paycheck, for example) and Portal with the default temporary password.

If the user will need to use Finance or HCM, you (your organization's PeopleSoft contact) submit a HEAT Ticket with the requested role assignments.



# User Profiles Screen: General Tab

Favorites ▾ Main Menu ▾ > PeopleTools ▾ > Security ▾ > User Profiles ▾ > User Profiles 🔍

**General** | ID | Roles | Workflow | Audit | Links | User ID Queries

User ID: 249905 **1**

Description: Lucille Ball **2** **Entered on the ID tab**  Account Locked Out? **3**

**Logon Information**

Symbolic ID: SYSADM ▾

Password: ..... **4**  Password Expired?

Confirm Password: .....

User ID Alias: \_\_\_\_\_

[Edit Email Addresses](#) **5** [Instant Messaging Information](#)

**General Attributes**

Language: English ▾  Enable Expert Entry

Currency: US Dollar ▾

Default Mobile Page: \_\_\_\_\_ 🔍

**Permission Lists**

Navigator Homepage: \_\_\_\_\_ 🔍 Primary: M\_SEC\_BU\_02000 **6** 🔍 ?

Process Profile: M\_PRCSPRFL 🔍 Row Security: M\_TL\_020\_ALL **7** **For HCM Users**

[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Add](#) [Update/Display](#)

[General](#) | [ID](#) | [Roles](#) | [Workflow](#) | [Audit](#) | [Links](#) | [User ID Queries](#)



# User Profiles Screen: General Tab

1	<b>User ID</b>	Same value as Empl ID. The User ID is used to log into PeopleSoft Portal and ESS.
2	<b>Description</b>	This is the employee's name but is not the same <i>field</i> as the name in Personal Information; the value may or may not be the same.
3	<b>Account Locked Out?</b>	Only the CRC can lock accounts. Typically the only employees with locked accounts are those who should not be allowed to access even PeopleSoft Employee Self-Service (ESS) to view a paycheck.
4	<b>Password</b>	Used to log into PeopleSoft Portal and ESS.
5	<b>Email address (user)</b>	The User email address (not the same field as the one entered in HR Personal Information) is where the system sends routing/workflow email notifications, absence approval emails (Manager), and password reset emails. IMPORTANT: Employees can edit their User Email Address in Portal or ESS > Main Menu > My Profile. Anyone who resets passwords for your organization can also edit this using the Distributed User Profiles screen.
6	<b>Primary Permission List</b>	Defines which district's data the user can see. All users need this value filled in. <i>Example: M_SEC_BU_02000 for District 20</i>
7	<b>Row Security</b>	Defines which district's data the user can see. Only HCM users need this value filled in. Exception: If your organization uses ESS Personal Info, employees will need Row Security. <i>Example: M_TL_020_ALL to see all employees at District 20</i>



# User Profiles Screen: Roles Tab

General | ID | **Roles** | Workflow | Audit | Links | User ID Queries

User ID 249905  
Description Lucille Ball

Dynamic Role Rule

Execute on Server     
  
Process Monitor  
Service Monitor

**User Roles 8** Personalize | Find | View 10 | First 1-24 of 24 | Last

Role Name	Description	Dynamic	Route Control	View Definition
M_ABSENCE_ENTRY	Absence Entry	<input type="checkbox"/>	Route Control	View Definition
M_ABSENCE_TECH	Absence Technician	<input type="checkbox"/>	Route Control	View Definition
M_BEN_DISTRICT_AD	District Benefits Admin	<input type="checkbox"/>	Route Control	View Definition
M_CRED_DISTRICT	District Credentials Admin	<input type="checkbox"/>	Route Control	View Definition
M_EE_ABSENCE	Access to ESS Absence Mod	<input type="checkbox"/>	Route Control	View Definition
<b>M_EMPLOYEE</b>	<b>Employee Basic Access</b>	<input type="checkbox"/>	Route Control	View Definition
M_HR_ACCTG	HR Accounting	<input type="checkbox"/>	Route Control	View Definition
M_HR_POSN_BUDG	HR Position Mgmt and Budget	<input type="checkbox"/>	Route Control	View Definition
M_HR_POSN_MGMT	Position Management	<input type="checkbox"/>	Route Control	View Definition
M_HR_SALARY_ADMIN	HR Salary Administrator	<input type="checkbox"/>	Route Control	View Definition
M_HR_SPECIALIST	HR Specialist	<input type="checkbox"/>	Route Control	View Definition
M_PAYROLL_ADMINIS	Payroll Administrator	<input type="checkbox"/>	Route Control	View Definition
M_PAYROLL_CBO	CBO/Finance Directory CommAcct	<input type="checkbox"/>	Route Control	View Definition
M_PAYROLL_SPECIALI	Payroll Specialist	<input type="checkbox"/>	Route Control	View Definition
M_QUERY_VIEW	Query Viewer	<input type="checkbox"/>	Route Control	View Definition
M_SECURITY_LEVEL1	Security level1	<input type="checkbox"/>	Route Control	View Definition
M_TL_ADMINISTRATO	Time and Labor Administrator	<input type="checkbox"/>	Route Control	View Definition
M_TL_APPROVER	TL Approver	<input type="checkbox"/>	Route Control	View Definition
M_TL_ENTRY	Time Entry Only	<input type="checkbox"/>	Route Control	View Definition
M_TL_TIMEKEEPER	District Timekeeper	<input type="checkbox"/>	Route Control	View Definition
M_ABSENCE_APPROVER	Absence Approver	<input checked="" type="checkbox"/>	Route Control	View Definition
<b>M_EE_020</b>	<b>La Mesa Spring Valley user</b>	<input checked="" type="checkbox"/>	Route Control	View Definition
M_EX_ESS_TRAVEL	ESS Travel and Expense	<input checked="" type="checkbox"/>	Route Control	View Definition
M_EX_MSS_TRAVEL	Travel & Expenses Manager	<input checked="" type="checkbox"/>	Route Control	View Definition

## 8 Roles

Roles define which screens, reports, and queries the user can access.

Basic roles that every employee is given:

- **M\_EMPLOYEE:** Gives access to view paycheck.
- **M\_EE\_XXX:** A dynamic role. The permissions in this role are district-specific. *XXX = District #*
  - 099 has it configured so employees use ESS for Absence Requests, Personal Information, Benefits Information Viewing, and Travel & Expenses
  - 033 has Benefits Information Viewing only
  - 022 has Personal Information and Absence Requests

Roles can be added and removed by the CRC using the plus/minus signs. Users who need to use PeopleSoft beyond Employee Self-Service are considered “**power users.**”

The CRC also sets up workflow and user preferences.





# Sample HEAT tickets based on User Profile

## Description (User's Name):

- “The employee’s name doesn’t show correctly in PeopleSoft.”
- “The employee doesn’t want her middle name to show in PeopleSoft.”
- Likely the user is seeing their name pulling from the User Description (not what’s entered in Personal Information). User Description appears on Workflow screens and on 2 screens within ESS (My Profile, Change Password). The CRC can change the Description, if desired – enter a HEAT ticket.

## Email Address:

- “The employee’s workflow isn’t going to his email account.”
- “The employee cannot use Forgot My Password functionality.”
- The user should verify/enter the User Email Address from ESS > My Profile.

## Roles:

- “I can’t get to the Job Data screen.” This indicates that the necessary role is not assigned to the user.

## Primary and Row Security:

- “I can get to the Job Data screen but I can’t find anyone.” This indicates that the role is assigned but the Row Security is not.
- “I am responsible for resetting passwords for my district and I can’t find Employee 123456.” This might be because Employee 123456 changed districts or is employed at multiple districts and the employee’s Primary Permission List is set to the other district. You can only find users with the same Primary Permission List as you. The CRC can update the user’s Permission List values.



# Identifying Users' Roles

## Query: M\_USER\_ROLES

In both PeopleSoft HCM and Finance you can run the query called M\_USER\_ROLES. Look in the “Role Name” column to see the roles that each employee has. If the employee is set up in both HCM and Finance, you will need to run the query in both environments to view those roles.

Company	User	Description	Empl Recor	Prim Perm List	Row Sec Prm Lst	Email ID	Role Name	HR Status	User Locked Out?
011	123456	Han Solo		0 M_SEC_BU_01100	M_TL_011_ALL	han.solo@district.net	M_TL_TIMEKEEPER	Active	No
011	123456	Han Solo		0 M_SEC_BU_01100	M_TL_011_ALL	han.solo@district.net	M_TL_ADMINISTRATOR	Active	No
011	123456	Han Solo		0 M_SEC_BU_01100	M_TL_011_ALL	han.solo@district.net	M_HR_SALARY_ADMIN	Active	No
011	123456	Han Solo		0 M_SEC_BU_01100	M_TL_011_ALL	han.solo@district.net	M_HR_POSN_MGMT	Active	No
011	123456	Han Solo		0 M_SEC_BU_01100	M_TL_011_ALL	han.solo@district.net	M_HR_POSN_BUDG	Active	No
011	123456	Han Solo		0 M_SEC_BU_01100	M_TL_011_ALL	han.solo@district.net	M_HR_ACCTG	Active	No
011	123456	Han Solo		0 M_SEC_BU_01100	M_TL_011_ALL	han.solo@district.net	M_EMPLOYEE	Active	No
011	123456	Han Solo		0 M_SEC_BU_01100	M_TL_011_ALL	han.solo@district.net	M_CRED_DISTRICT	Active	No
011	123456	Han Solo		0 M_SEC_BU_01100	M_TL_011_ALL	han.solo@district.net	M_BEN_DISTRICT_ADMIN_RDO	Active	No
011	123456	Han Solo		0 M_SEC_BU_01100	M_TL_011_ALL	han.solo@district.net	M_ABSENCE_ADMIN	Active	No
011	123456	Han Solo		0 M_SEC_BU_01100	M_TL_011_ALL	han.solo@district.net	M_TL_APPROVER	Active	No
011	123456	Han Solo		0 M_SEC_BU_01100	M_TL_011_ALL	han.solo@district.net	M_SECURITY_LEVEL1	Active	No
011	123456	Han Solo		0 M_SEC_BU_01100	M_TL_011_ALL	han.solo@district.net	M_QUERY_VIEW	Active	No
011	123456	Han Solo		0 M_SEC_BU_01100	M_TL_011_ALL	han.solo@district.net	M_PAYROLL_CBO	Active	No
011	123456	Han Solo		0 M_SEC_BU_01100	M_TL_011_ALL	han.solo@district.net	M_PAYROLL_ADMINISTRATOR	Active	No
011	123456	Han Solo		0 M_SEC_BU_01100	M_TL_011_ALL	han.solo@district.net	M_HR_SPECIALIST_RDO	Active	No


To access the M\_USER\_ROLES query in Finance you must have the M\_KK\_ENTER\_BUDGETS or M\_KK\_INQUIRY roles; in HCM you must have the M\_HR\_SPECIALIST or M\_HR\_SPECIALIST\_RDO roles.



# Understanding What's In a Role

## Query: M\_SEC\_ROLE\_NAVIGATION

In both PeopleSoft HCM and Finance you can run the query called M\_SEC\_ROLE\_NAVIGATION. This query will tell you which navigations are in the role.



M\_SEC\_ROLE\_NAVIGATION - Accessible Navigation by Role

Role Name %:  🔍

Component %:

[View Results](#)

### How to search:

- **Role Name %.** Look up the role name. Search for the ones that begin with “M\_” only.
- **Component %.** Enter a % in Component to return all values. A component is a collection of related pages or tabs. (Advanced users – go to Ctrl + Shift + J on a page to see the Component).

NOTE: This query may take a long time to return results; you can schedule it to prevent it from timing out.



# Security for New Hires and Terminations



# New Hires

## Does your organization have a process in place to review a new hire's roles (inherited from another PeopleSoft organization)?

When an employee **joins your organization**, here is the recommended process:

- Use the M\_USER\_ROLES query in HCM and/or FIN to review the user's existing roles, if any.
- If roles need to be added or removed, or if workflow needs to change, submit a HEAT ticket with the request.
- The CRC will:
  - Log into HCM and Finance and add/remove specified roles, and update workflow, if necessary
  - Update the Primary Permission list (and Row Security for HCM, if necessary)
- The user should go to ESS > My Profile and update/verify email address (this email is used for workflow and Forgot My Password)



# Terminations

## Does your organization have a process to request that roles are removed when an employee is terminated?

When an employee **leaves your organization**, here is the recommended process:

- Submit a HEAT ticket to indicate that the employee has left and the PeopleSoft access needs to be removed.
- The CRC will:
  - Log into HCM and Finance and removes all roles
  - Leave the Primary Permission list as is
  - Leave M\_EMPLOYEE role so the employee can still view paychecks in ESS
- If you want the employee to have no access at all, please indicate that you would like the CRC to lock the account (cannot view paychecks).




# Security Audit

Which users have access to which information?  
Use the M\_USER\_ROLES query to find out.



# M\_USER\_ROLES query

**M\_USER\_ROLES - Users and their Roles**

Company: 020 

[View Results](#)

Download results in : [Excel SpreadSheet](#) [CSV Text File](#) [XML File](#) (5120 kb)

View All First 1-100 of 9808 Last

	Company	User	Description	Prim Perm List	Row Sec Prm Lst	Email ID	Role Name	HR Status	User Locked Out?
1	020			M_SEC_BU_020000			M_EE_020	Active	No
2	020			M_SEC_BU_020000			M_EMPLOYEE	Active	No
3	020			M_SEC_BU_020000			M_EX_ESS_TRAVEL	Active	No
4	020			M_SEC_BU_020000			M_EE_020	Active	No
5	020			M_SEC_BU_020000			M_EMPLOYEE	Active	No
6	020			M_SEC_BU_020000			M_EX_ESS_TRAVEL	Active	No
7	020			M_SEC_BU_020000	M_TL_020_ALL		M_EE_021	Inactive	No
8	020			M_SEC_BU_020000	M_TL_020_ALL		M_EMPLOYEE	Inactive	No
9	020			M_SEC_BU_020000			M_ABSENCE_APPROVER	Active	No
10	020			M_SEC_BU_020000			M_ABSENCE_ENTRY	Active	No
11	020			M_SEC_BU_020000			M_EE_020	Active	No
12	020			M_SEC_BU_020000			M_EE_ABSENCE	Active	No
13	020			M_SEC_BU_020000			M_EMPLOYEE	Active	No
14	020			M_SEC_BU_020000			M_EX_ESS_TRAVEL	Active	No
15	020			M_SEC_BU_020000			M_EX_MSS_TRAVEL	Active	No

**SAMPLE RESULTS**

- In both PeopleSoft HCM and Finance you can run the query called **M\_USER\_ROLES** to audit **Roles, Primary Permission List, Row Security, and Locked Out Status.**
- If the employee is set up in both HCM and Finance, you will need to run the query in both environments.
- The HCM results include “HR Status” (Active/Inactive).
- To access the M\_USER\_ROLES query in Finance you must have the M\_KK\_ENTER\_BUDGETS or M\_KK\_INQUIRY roles; in HCM you must have the M\_HR\_SPECIALIST or M\_HR\_SPECIALIST\_RDO roles.







# Roles (by Employee Name)

- Which PeopleSoft HCM and Finance roles does each employee have?

## Sample pivot table (HCM query):

FILTERS		COLUMNS		
		HR Status		
ROWS	VALUES	Column Labels		
Description	Count of Desc...	Active	Inactive	
Role Name		Grand Total		
		5	5	10
M_EE_006		1	1	2
M_EE_020		1	1	2
M_EE_042		1	1	2
M_EMPLOYEE		1	1	2
M_EX_ESS_TRAVEL		1	1	2
		3		3
M_EE_020		1		1
M_EMPLOYEE		1		1
M_EX_ESS_TRAVEL		1		1
		3		3
M_EE_020		1		1
M_EMPLOYEE		1		1
M_EX_ESS_TRAVEL		1		1
		3		3
M_EE_020		1		1
M_EMPLOYEE		1		1
M_EX_ESS_TRAVEL		1		1
			1	1
M_EMPLOYEE			1	1
		3		3
M_EE_020		1		1
M_EMPLOYEE		1		1
M_EX_ESS_TRAVEL		1		1
			1	1
M_EMPLOYEE			1	1

- Run this for HCM or Finance.
- Set up the pivot table as shown here.
- Review each employee's roles.
- Do any changes need to be made?
- Are there any terminated employees who still have roles assigned?



# SSN (National ID)

## Q: Who can see SSNs?

A: The following 14 HCM roles can see SSNs:

1. M\_CRED\_DISTRICT
2. M\_CRED\_DISTRICT\_RDO
3. M\_HR\_PERSONAL\_DATA
4. M\_HR\_PERSONAL\_DATA\_RDO
5. M\_HR\_SPECIALIST
6. M\_HR\_SPECIALIST\_RDO
7. M\_HR\_JOB\_EDIT\_ONLY
8. M\_HR\_JOB\_RDO
9. M\_PAYROLL\_SPECIALIST
10. M\_PAYROLL\_SPECIALIST\_RDO
11. M\_PAYROLL\_ADMINISTRATOR
12. M\_PAYROLL\_ADMINISTRATOR\_RDO
13. M\_PAYROLL\_CBO
14. M\_PAYROLL\_CBO\_RDO

### Alternative roles to use if the employee should not access SSNs:

- M\_HR\_JOB\_DATA: Job Data but no access to Personal Information screen
- M\_HR\_JOB\_EMPL\_DATA: Employment Data link on Job Data screen only
- M\_HR\_JOB\_BENEFITS: Benefits Program Participation link on Job Data screen only
- M\_HR\_PERSON\_CONTACT: Contact Information tab on Personal Information screen only
- M\_HR\_PERSON\_REGIONAL: Regional tab on Personal Information screen only



# Password Resets

**Q: Who can perform password resets?**

A: M\_SECURITY\_LEVEL1 role in HCM. This role allows for password resets using the Distributed User Profile screen in Portal (not HCM or Finance).



# SecureAuth (VPN)

**Q: Who has SecureAuth (VPN) access?**

A: M\_REMOTE\_USER role in HCM. These are staff with SecureAuth access.



# Locked out?

**Q: Are any users locked out?**

**A:** Use the M\_USER\_ROLES in HCM. Check **User Locked Out (Column J)**. If “Yes” this indicates a user account is locked. Only the CRC can lock accounts. Typically the only employees with locked accounts are those who should not be allowed to access even PeopleSoft Employee Self-Service (ESS) to view a paycheck.

**Sample pivot table (HCM query):**

	A	B	C	D
1	User Locked Out?	Yes		
2				
3	<b>Count of Description</b>	<b>Column Labels</b>		
4	<b>Row Labels</b>	<b>Active</b>	<b>Inactive</b>	<b>Grand Total</b>
5		3		3
6			17	17
7	<b>Grand Total</b>	<b>3</b>	<b>17</b>	<b>20</b>
8				

Filter Cell B1 by Yes. Which users are locked out? Should they be locked out? Is there anyone else who needs to be locked out?



# Security Audit Guide

Please read the Security Audit guide.

- It contains in-depth information about performing a Security Audit.
- The items highlighted in yellow were addressed in this demo.
- The guide contains a recommended process, tips, and other items to audit.

## PeopleSoft Security Audit

*Version 1.0 | Updated May 9, 2017*

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These tips were provided by Michelle Hurlstone, Personnel Operations Supervisor, Certificated Personnel Escondido Union School District

# Example from Escondido Elementary

- Create a list of all roles and their functions/responsibilities/what they see.
- Add job titles next to each of the roles:

ESCONDIDO ELEM SAMPLE			FINANCE				PAYROLL				
Director of Finance	Accountant	Accounting Supv	Budget Analyst	Payroll Clerk	Payroll Tech	Payroll Supervisor					
M_ABSENCE_ADMIN_RDO	M_HR_ACCTG	M_BEN_DISTRICT_ADMIN_RDO	M_ABSENCE_ADMIN	M_ABSENCE_ADMIN	M_ABSENCE_ADMIN	M_ABSENCE_ADMIN					
M_ABSENCE_TECH_RDO	M_HR_POSN_MGMT_RDO	M_HR_ACCTG	M_BEN_DISTRICT_ADMIN_RDO	M_ABSENCE_TECH	M_ABSENCE_TECH	M_ABSENCE_TECH					
M_BEN_DISTRICT_ADMIN_RDO	M_HR_SALARY_ADMIN_RDO	M_HR_POSN_MGMT_RDO	M_HR_ACCTG	M_HR_POSN_MGMT_RDO	M_HR_POSN_MGMT_RDO	M_HR_POSN_MGMT_RDO					
M_HR_ACCTG	M_PAYROLL_ADMINISTRATOR_RDO	M_HR_SALARY_ADMIN_RDO	M_HR_POSN_BUDG	M_HR_SPECIALIST_RDO	M_HR_SPECIALIST_RDO	M_HR_POSN_BUDG					
M_HR_POSN_BUDG_RDO	M_PAYROLL_CBO_RDO	M_PAYROLL_ADMINISTRATOR_RDO	M_HR_POSN_MGMT_RDO	M_PAYROLL_ADMINISTRATOR	M_PAYROLL_ADMINISTRATOR	M_HR_POSN_MGMT_RDO					
M_HR_POSN_MGMT_RDO	M_PAYROLL_SPECIALIST_RDO	M_PAYROLL_CBO_RDO	M_HR_SALARY_ADMIN	M_PAYROLL_CBO_RDO	M_TL_ADMINISTRATOR	M_HR_SALARY_ADMIN					
M_HR_SALARY_ADMIN_RDO	M_TL_ADMINISTRATOR_RDO	M_PAYROLL_SPECIALIST_RDO	M_HR_SPECIALIST_RDO	M_TL_ADMINISTRATOR	M_TL_APPROVER	M_HR_SPECIALIST_RDO					
M_HR_SPECIALIST_RDO	M_TL_APPROVER_RDO	M_TL_ADMINISTRATOR_RDO	M_PAYROLL_ADMINISTRATOR_RDO	M_TL_APPROVER	M_PAYROLL_CBO_RDO	M_PAYROLL_ADMINISTRATOR					
M_PAYROLL_ADMINISTRATOR_RDO		M_TL_APPROVER_RDO	M_PAYROLL_CBO_RDO		M_HR_JOB_COMPENSATION	M_PAYROLL_CBO					
M_PAYROLL_CBO			M_PAYROLL_SPECIALIST_RDO			M_SECURITY_LEVEL1					
M_PAYROLL_SPECIALIST_RDO			M_TL_ADMINISTRATOR_RDO			M_TL_ADMINISTRATOR					
M_TL_ADMINISTRATOR_RDO			M_TL_APPROVER_RDO			M_TL_APPROVER					
M_TL_APPROVER_RDO						M_HR_JOB_COMPENSATION					

- Use the M\_USER\_ROLES query to see who you have assigned in each role.
- Then you can go strategically through each role assigned and determine if that person needs access or not.
- We decided we would have one main person in HR that would create all HEAT tickets to give/remove access (Person #1). We also have a backup person if Person #1 is out. Person #1 will maintain the security audit spreadsheet and make changes as needed.
- We have added this step on our new hire checklist & separation checklist. It says: \_\_\_\_\_ HEAT Ticket for PSoft access (HR/Payroll EE's)

