Users & Roles in PeopleSoft

Presented by SDCOE CRC | August 18, 2016

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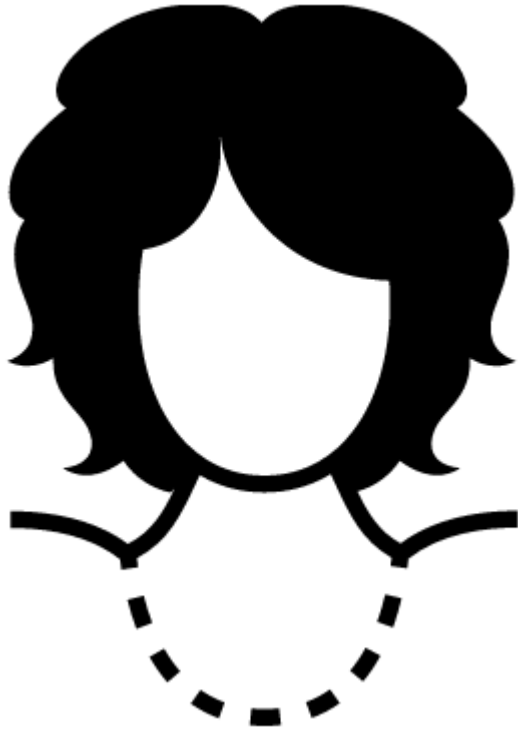
Cyndi works at District 17. She is the Business Manager at the District Office. She uses both PeopleSoft Finance and HCM to do her job. In order to use PeopleSoft, she needs to be set up as a **user** with the appropriate **roles**. This is done by the CRC because her user record is separate from her employee record.

TOPICS:
- The difference between "Employee" and "User"
- User Profile screen
- How users are created
- How roles work
- Roles that everyone gets
- Common roles
- 2 queries that you can run

"Employee" vs "User"

EMPLOYEE RECORD	USER RECORD
Personal Data screen Managed by your HR Department	**User Profiles screen** Managed by the CRC
- Employee ID - Employee's legal name - Email address (employee) - TB notice emails - Queries	- User ID (same value as Empl ID) - Description (the employee's name) - Email address (user) - Routing/workflow emails - 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.

Let's go look at both of these screens in PeopleSoft to compare these fields…

User Profile screen (CRC)

- **User ID:** This is what you use to log in
- **Password:** There is one PeopleSoft password used for Portal (to access Finance/HCM) and ESS
  - You can reset your own password in Portal or ESS
  - There is no "lock out" if you try multiple times to log in and are not successful
  - Hyperion is not connected to the PeopleSoft login and has a separate password
- **Description:** This is the employee's name but is not the same field as the name in Personal Data: the value may or may not be the same
  - "The employee's name doesn't show correctly in PeopleSoft" or "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 Data). The CRC can change this if desired.
- **Roles:** Roles define which screens and reports the user can access
  - "I can't get to the Job Data screen." This indicates that the roles is not assigned to the user.
- **Primary and Row Security:** These fields define which *data* the user can see
  - "I can get to the Job Data screen but I can't find anyone." This indicates that the role is assigned but the Permission List 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.

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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.

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).
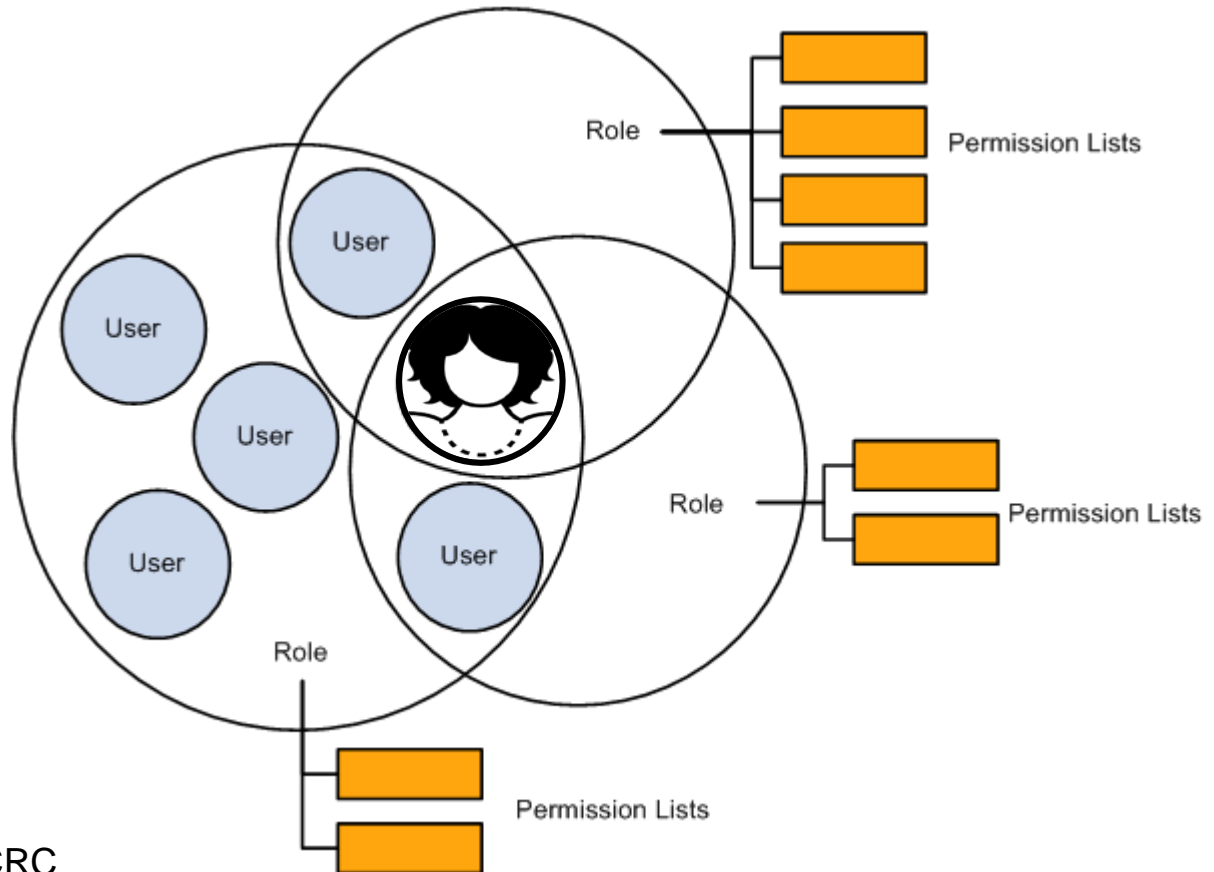
Roles

A user's security profile is made up of permission lists and roles.

This diagram illustrates how permission lists are assigned to roles and then roles assigned to user IDs to create user security profiles.

Source: docs.oracle.com

Let's take a closer look at how the CRC assigns roles to users.

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Roles That Everyone Gets

Everyone gets 2 basic roles:

- **M_EMPLOYEE:** Gives to access to view paycheck

- **M_EE_XXX:** 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

Common Roles

Finance	HCM
INQUIRY Roles = Read only	RDO Roles = Read only (Each role has an RDO version)
- **M_SEC_CF_NOCASH:** Provides ChartField security to enter transactions (if you don't have this role you can navigate to a page to which you have access but you can't *save* an entered ChartField) - **M_KK_INQUIRY:** To view budget screens and reports - **M_PO_REQUESTER:** To create requisitions - **M_PO_INQUIRY:** To view POs - **M_GL_CREATE_JOURNALS:** To create GL journal entries - **M_QUERY VIEW:** To run queries based on your role assignment	- **M_HR_SPECIALIST:** To enter personal data and job data (and more) - **M_HR_SPECIALIST_RDO:** To view personal data and job data (and more) - **M_HR_PERSONAL_DATA:** To enter personal data but not job data - **M_PAYROLL_ADMINISTRATOR:** All access that Payroll Specialist has, but includes access to the Payroll Query Tree, DBT, and Combo Code Table. - **M_TL_TIMEKEEPER:** Data entry for Timekeepers. - **M_QUERY VIEW:** To run queries based on your role assignment

Role Descriptions

To see a list of roles:

1. Go to the Security page at
   http://crc.sdcoe.net/resources/security

2. Scroll to the bottom.

3. Click the red arrow next to a file to download an Excel file of the roles.

| X | Finance Roles v5.0.xlsx (18k) | Peyri Herrera, Aug 17, 2016, 2:15 PM | v.1 | ↓ |
| X | HCM Roles v5.0.xlsx (14k) | Peyri Herrera, Aug 17, 2016, 2:16 PM | v.3 | ↓ |

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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.

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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 %: M_HR_PERSONAL_DATA

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).