

Maintain Department Functional Roles in PeopleSoft

Dept ID Functional Roles identify employees who hold key operational functions within a Department or, in the case of the PPA and CSC roles, support a Department. The following grid denotes the Functional Role, description/duties of the role and the number of people that can be assigned to the role within a Department.

Functional Role		Description	Number/Dept ID
AA	Access Administrator	Designated by department head to request access to administrative systems (e.g., BearBuy, My Reports, PeopleSoft). Maintains functional role assignments, but cannot assign a role to themselves	Up to four
BUS	Business Officer	Chief financial person (often referred to as the MSO or Management Services Officer) for campus or Director level for UCSF Health	One
CSC	Computer Support Coordinator	Responsible for departmental network and desktop support; populated by IT Field Services	One
ERC	Effort Report Coordinator	Contact for UCOP and the EMF Compliance Unit for all certification, monitoring, and compliance activities	One
FINA	Financial Administrator	Responsible for day-to-day financial activities in the department. Default for notification when a SpeedType is invalid	One
HEAD	Head of Unit	Responsible for organizational and financial operations within a department. Cost center manager for UCSF Health. Has approval authority for the department, including MyExpense reimbursements. May delegate approval authority to designated individuals	One
HLCL	Senior Executive	C-Level or Senior Vice Presidents. For UCSF Health only	Two
HLXD	Executive Director	Executive Directors for UCSF Health only	Two
PPA	Payroll/Personnel Admin	Responsible for OLPPS entry/update and day-to-day payroll/personnel activities for a department; populated by HR Service Centers	Up to two

Update Department Functional Roles in PeopleSoft By Dept ID

Access Administrators can maintain and update department functional roles currently established in **PeopleSoft**. Use the following steps to search by Dept ID and review and update the roles assigned to individual employees.

- 1 Login to **MyAccess** at <http://myaccess.ucsf.edu> (not shown). Scroll down to locate and select **PeopleSoft** from the applications menu. If you have set MyAccess to display “favorites”, you may need to change to “All Apps” or search for PeopleSoft.

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- 2 Navigate to the **Main Menu** and select: **Department Role Maintenance > Department Role Assignment**
- 3 Search for your Department on the **Department Role Assignment** page. Enter the complete Dept ID or portion of the number, and select the correct Dept ID from the drop down list
- 4 Click **Search**

- 5 The **Department Roles** for the Dept ID will display, and you can update:
 - a The **Functional Role** of an existing employee
 - b The **Employee ID** of the person assigned to the Functional Role
 - c The number of rows by clicking the **+** to add a new row and the **-** to remove an existing row
- 6 Click **Save** when all updates are complete

Note: If you add a new **Access Administrator**, the person will also need the Access Administrator PeopleSoft role (ZGL_CF_DEPT_ROLE) requested via the **Access Management** system (via MyAccess)

Update Departmental Functional Roles in PeopleSoft By Employee Mass Update

Mass updating Department roles in **PeopleSoft** allows you to select an **Employee ID** and change the assignment of all **Functional Roles** that are currently assigned to him/her to someone else. This option is helpful when an employee leaves the organization or transfers out of the Department.

- 1 Login to **MyAccess** at <http://myaccess.ucsf.edu> (not shown). Scroll down to locate and select **PeopleSoft** from the applications menu. (not shown)
- 2 Navigate to the **Main Menu** and select: **Department Role Maintenance > Department Role Mass Update**
- 3 Search for the currently assigned employee by searching for their **Employee ID**
- 4 Click **Search** to view all roles assigned to the Employee ID
- 5 Results of the search will display below, and includes all Functional Roles for the Employee ID, sorted by Dept ID. If desired, narrow the results of the search by selecting the **Dept. Func. Role** and clicking **Search** again

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6 Transfer all or some of the roles by clicking:

- a The **Select All** link (not check box) to add check marks to all rows
- b The individual check boxes of Roles to transfer
- c The **Clear All** link (not check box) to remove all checks from rows

7 Once all selections are made, enter the **Employee ID** to which the roles should be transferred. Note, if you are transferring the Access Administrator role, the recipient must already have the PeopleSoft role added.

8 Click **Apply** to transfer the roles

9 Click **Save** to save all changes

6

a

c

☒ Select All
 ☐ Clear All

Rows Selected for Update

Department Roles						Personalize	Find	View All	First	1-8 of 8	Last
Select	SetID	Dept ID	Functional Role	Employee ID	Primary Flag						
1 <input type="checkbox"/>	UCSF	408040	Access Administrator	023488869	No						
2 <input type="checkbox"/>	UCSF	408041	Access Administrator	023488869	No						
3 <input type="checkbox"/>	UCSF	408043	Access Administrator	023488869	No						
4 <input type="checkbox"/>	UCSF	408045	Access Administrator	023488869	No						
5 <input type="checkbox"/>	UCSF	408046	Access Administrator	023488869	No						
6 <input type="checkbox"/>	UCSF	408047	Access Administrator	023488869	No						
7 <input type="checkbox"/>	UCSF	408048	Access Administrator	023488869	No						
8 <input type="checkbox"/>	UCSF	410097	Access Administrator	023488869	No						

Save

Notify

Department Role Mass Update

1. Select the employee to be replaced

*Employee ID: 999999999

Baths,Sutro

Search

Dept Func Role:

2. Replace with the following employee

7 Employee ID: 999999988

Tower,Colt

8 Apply

☒ Select All
 ☐ Clear All

Rows Selected for Update

Department Roles						Personalize	Find	View All	First	1-8 of 8	Last
Select	SetID	Dept ID	Functional Role	Employee ID	Primary Flag						
1 <input checked="" type="checkbox"/>	UCSF	408040	Access Administrator	023488869	No						
2 <input checked="" type="checkbox"/>	UCSF	408041	Access Administrator	023488869	No						
3 <input checked="" type="checkbox"/>	UCSF	408043	Access Administrator	023488869	No						
4 <input checked="" type="checkbox"/>	UCSF	408045	Access Administrator	023488869	No						
5 <input checked="" type="checkbox"/>	UCSF	408046	Access Administrator	023488869	No						
6 <input checked="" type="checkbox"/>	UCSF	408047	Access Administrator	023488869	No						
7 <input checked="" type="checkbox"/>	UCSF	408048	Access Administrator	023488869	No						
8 <input checked="" type="checkbox"/>	UCSF	410097	Access Administrator	023488869	No						

9 Save

Notify