Requesting MyReports Access
Using the Access Management Application

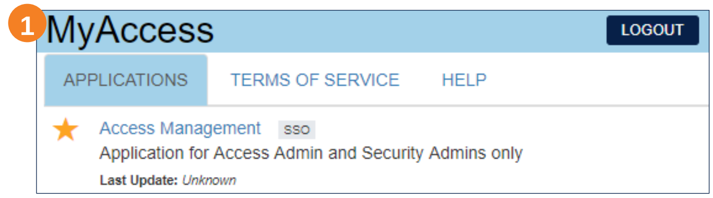
Introduction

The **Access Management** application is used to process and track access requests made by Access Administrators and Security Administrators for the following Financial Systems supported by the Controller's Office: **PeopleSoft Financials**, **RAS**, **MyReports**, **GL Verification** (**GLV**) **tool**, and **Effort Reporting System** (**ERS**).

This document provides instructions on how to request and modify access to **MyReports** using the **Access Management** application.

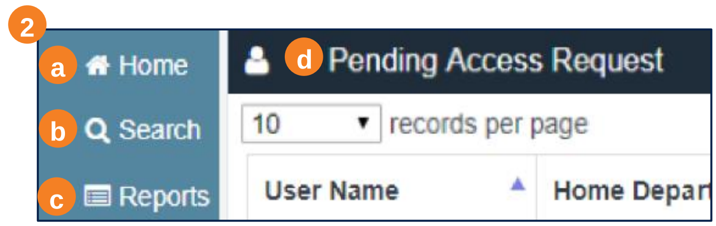
Log In via MyAccess

1 Log into the **Access Management** application through **MyAccess**.



> The Access Administrator role is required and is assigned using **PeopleSoft** Department Role assignments. See [Maintain Department Functional Roles in PeopleSoft](#) for more information.

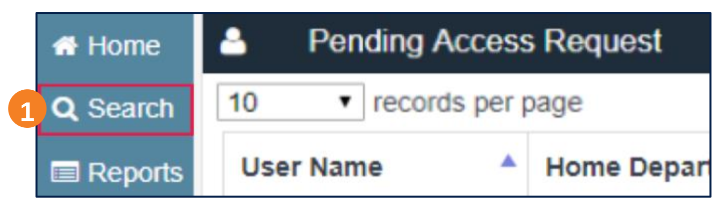
2 The **Access Management** application displays:



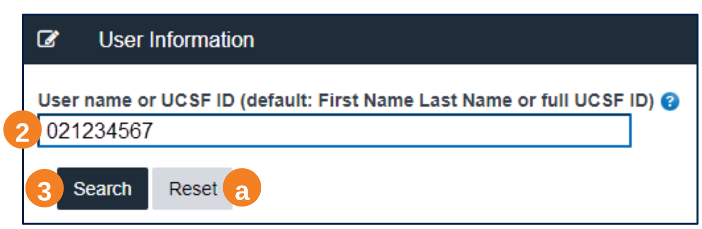
- a **Home** - Returns the user to the home page.
- b **Search** - Finds records by username and/or Employee ID.
- c **Reports** - Links to the following reports:
  - Requests by application
  - Requests by department
- d **Pending Access Request** - Lists pending requests by user name.

Search for Users

1 Click **Search**.



2 Enter the name as **First Last** (e.g., John Doe) or a UCSF ID number. The application will display a drop-down menu of filtered results based on your entry. You ***must select*** a name from the list. When entering an UCSF ID, you ***must enter the entire nine digits*** of the ID ***before*** the drop-down selection menu will display.



3 Click **Search**.

> **Note**:
> - The system ***will display an error*** if you do not choose from the list ***before clicking Search***.
> - If a drop-down menu does not display after you have entered correct information in the search field, refresh the page by clicking the 'Reset' button under the search field (a) and try again.

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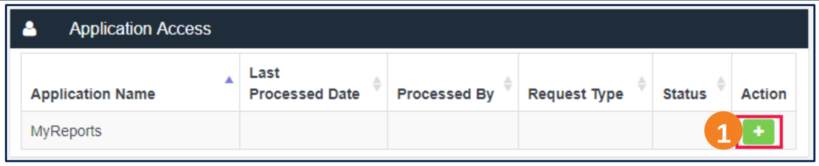
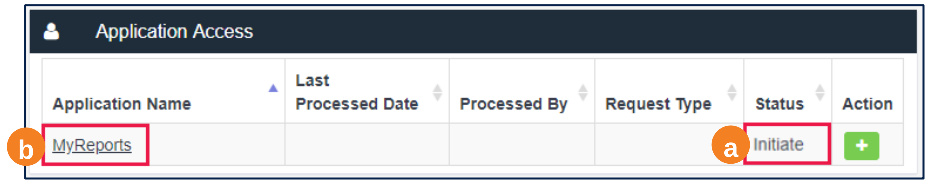
Select MyReports

1. To request access to **MyReports**, click the green plus button (+) in the **Action** column.



Note: if the employee already has **MyReports** access, the status column will display **Processed**.

After clicking + , the status will change to **Initiate** (a) and the **MyReports** application name will change to a hyperlink indicated by an underline (b).



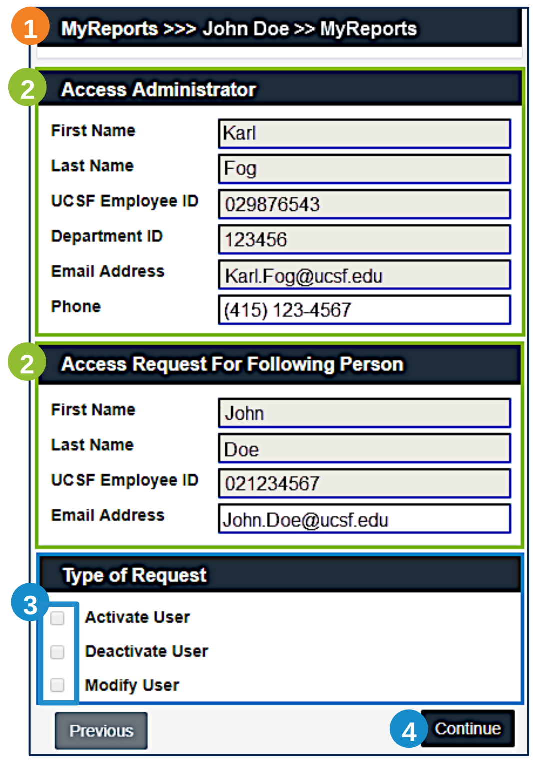
Note this request is not yet submitted! This action only opens the appropriate forms that need to be edited or completed.

Complete the MyReports Form

1. Click on the MyReports hyperlink shown in step b above. The **MyReports** form displays.
2. Complete the **MyReports** form.

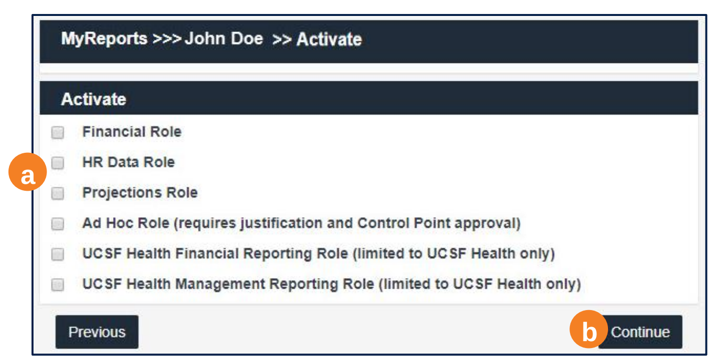
   Note:
   - Basic information such as the **Access Administrator** and **Access Request For Following Person** data are pre-populated **(green highlighted sections)**.
   - You will be prompted to complete any required portions of the form that are missing before you can proceed.
3. Select the **Type of Request** by checking the appropriate box.
4. Click **Continue**.

Each **Type of Request** selection will open a specific section of the access request form that must be completed. Instructions for each type of request follows, which must also be completed before submission.



Request Type Instructions

- **Activate User: Granting New Access to MyReports**
  a. Select the role(s) you wish to assign to the user.
  b. Click **Continue**.



See the MyReports Access & Availability webpage for information on **MyReports** roles.

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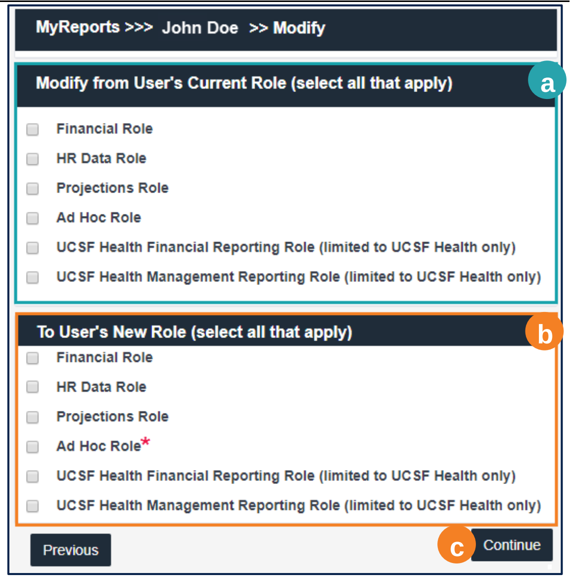
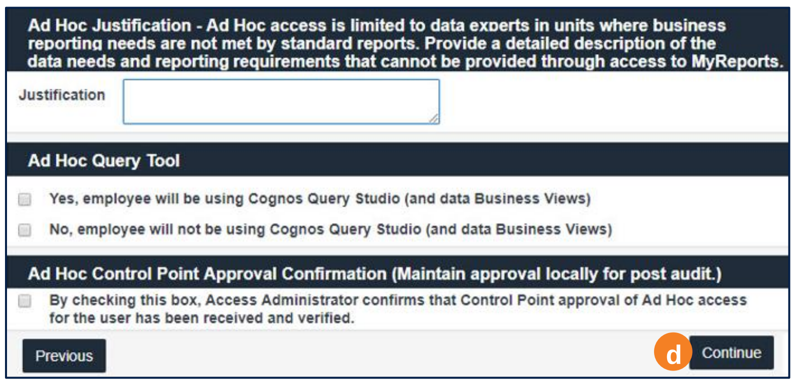
- **Modify User: Modifying Access to MyReports**
  - The Access Management application *does not maintain a listing of current role(s)*. Access Administrators must first manually enter the user's current MyReports role(s) under *Modify from User's Current Role* (a), by checking the appropriate box(es).
    - To add additional MyReports role(s):
      - Under *To User's New Role* (b), select all the same user's current MyReports role(s) you entered in step a.
      - Select the additional role(s) you wish to add.
    - To remove MyReports role(s):
      - Under *To User's New Role* (b), select all the same user's current MyReports role(s) you entered in step a.
      - De-select the role(s) you wish to remove.



c Click **Continue**.

*__Ad Hoc Role__

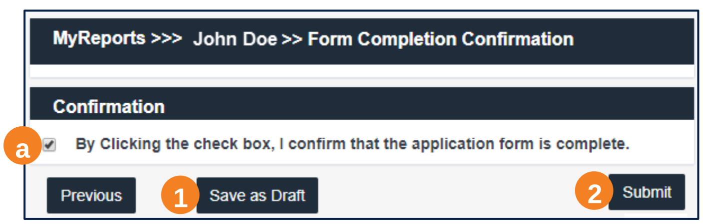
A second form displays if you are requesting to grant access to the Ad Hoc Role. Control point approval ***must*** be obtained prior to submitting the request.



d Once you have completed *all required sections*, click **Continue**.

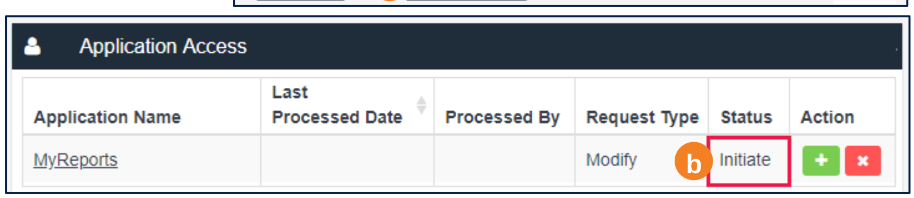
Save and Submit

Choose one of two options on the final page:



1 Click **Save as Draft** if you want to save changes *but **not** submit*.

- Note each form has a final confirmation checkbox that must be selected before it can be saved and/or submitted (a).



The request will be saved under the user's **Application Access**. Notice that the status is **Initiate** (b).

2 Click **Submit** if you are ready to submit the request to the Security Administrator.

The request will be sent to the Security Administrator. This will change the status to **Process Pending** (c).

The request can still be cancelled by the Access Administrator by selecting ✖ under the Action column (d).

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Next Steps

1. A **ServiceNow** ticket is created for processing by IT after the request is submitted in **Access Management**. Access administrators can expect to receive an email from ServiceNow notifying them a ticket has been created.

2. In addition to the **ServiceNow** notification, an email is sent to the employee and Access Administrator informing them a request has been submitted from **the Access Management** application. A PDF copy of the access request is attached to the email:

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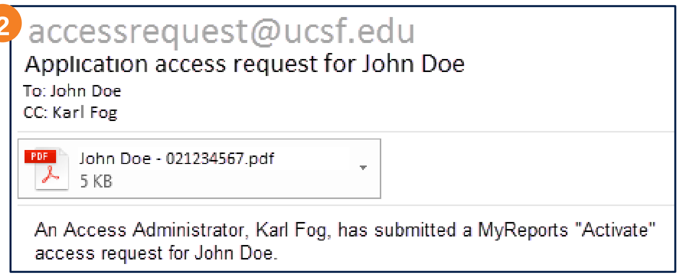

3. A second email is sent to the employee and Access Administrator informing them when the access request has been processed.

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4. Lastly, the Access Administrator will receive an additional email from **ServiceNow** once the ticket has been resolved.

Additional Information & Assistance

If you are experiencing issues granting/modifying **MyReports** access using the **Access Management** application, contact the Controller's Office Solution Center at (415) 476-2126 or COSC@ucsf.edu for assistance.