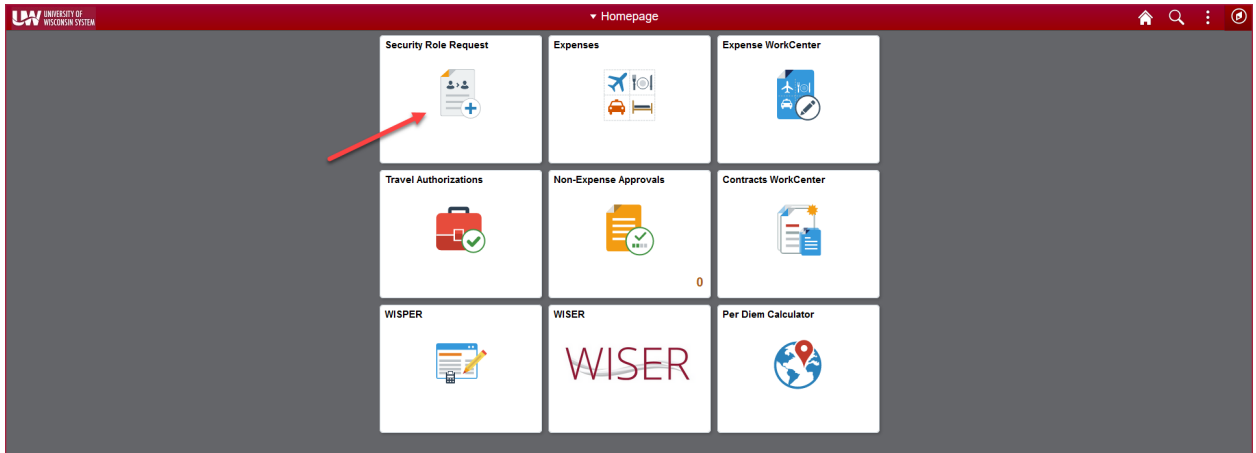
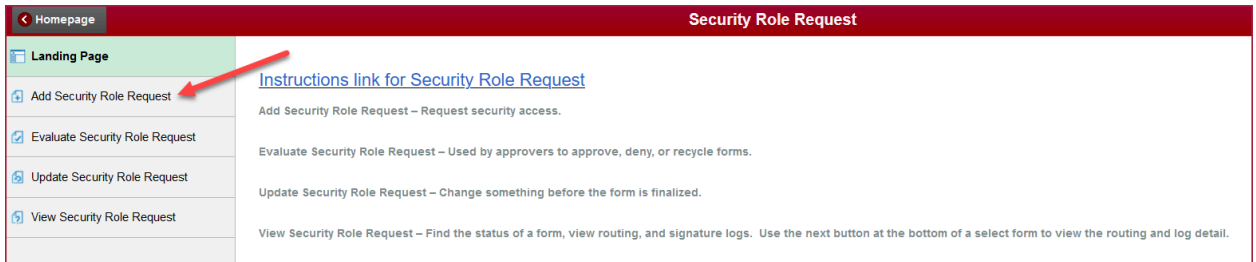


# SFS Security Role Request

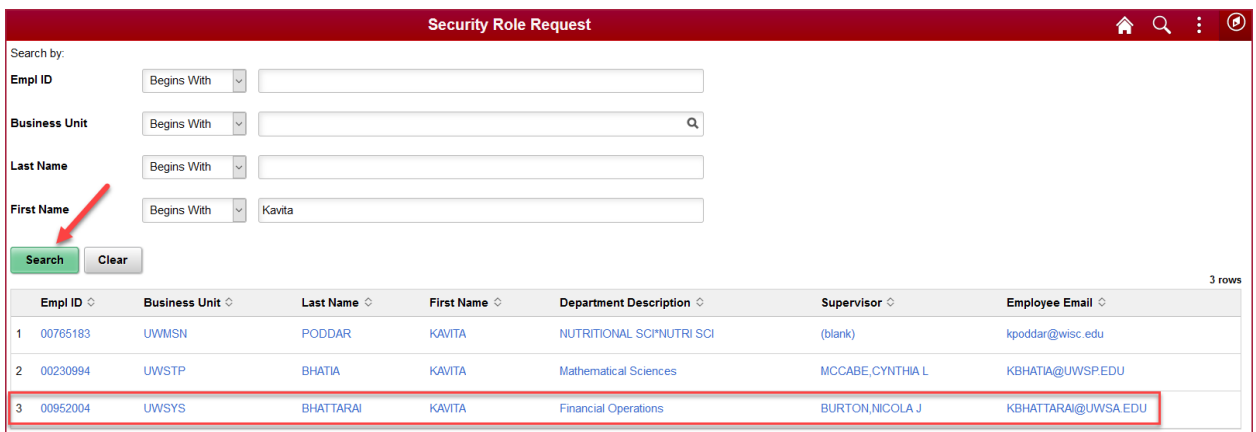
1. Click the following link to Navigate to SFS, <https://portal.sfs.wisconsin.edu/>
2. On the SFS homepage, click the **Security Role Request** tile.



3. On the Security Role Request landing page, click on the **Add Security Role Request** link to the left of the page.



4. Enter search criteria for the individual for whom you will be requesting access. This could be for yourself or someone else. Click the Search button and select the user.



5. The Security Request Form will populate with the requestor, the user receiving access, and the user's supervisor if available. If the supervisor is not shown, click the magnifying glass to search.

# SFS Security Role Request

Security Role Request

Shared Financial System(SFS) - User Request Authorization Form : Add Security Request

**Request Details**

Guidelines and requirements for requests can be found here: <https://www.wisconsin.edu/sfs/security>  
Questions can be sent to [uwsaproblemsolvers@uwsa.edu](mailto:uwsaproblemsolvers@uwsa.edu).  
If you have errors on the form, you will receive [error messages](#). You must resolve the errors before you can successfully Save or Submit.  
Once you Save, you're done with this page and must navigate to Update Security Request to continue making changes and Save or Submit.

Form Type SEC\_SFS\_02  
Date Request Initiated 03/03/2021  
Requestor 00857570 ANDERSON,KIRK Requestor Email KANDERSON@UWSA.EDU  
Empl ID 00952004 BHATTARAI,KAVITA Employee Email KBHATTARAI@UWSA.EDU  
Business Unit UWSYS UW System Wide  
\*Dept ID 503700 Financial Operations  
\*Supervisor Supervisor Email  
Business Unit Admins LARSON,SCOTT C Email: SLARSON@UWSA.EDU  
PEREZ-GOMEZ,JOSE Email: JPerez@UWSA.EDU

6. Click **Search Criteria** to expand the search section. Enter information for the supervisor and click Search. Select the user's supervisor.

Cancel Lookup

Search for: Supervisor

**Search Criteria** [Show Operators](#)

Empl ID (begins with)  
Last Name (begins with) BURTON  
First Name (begins with)

Search Clear

**Search Results** 12 rows

Empl ID	Last Name	First Name	Business Title	Email Address	Name
00315984	BURTON	KELLY	SR STUDENT SERV COORD	kburton@enr.wisc.edu	BURTON,KELLY R
00587167	BURTON	QUINN	Medical Director	quinn.burton@gmail.com	BURTON,QUINN C
00589766	BURTON	KRISTEN	OUTREACH PROG MGR I	BURTONK@UWW.EDU	BURTON,KRISTEN B
00759797	BURTON	NICOLA	DIR, UNSPECIFIED (8)	NBURTON@UWSA.EDU	BURTON,NICOLA J
00769993	BURTON	ASA	CUSTODIAN	asa.burton@wisc.edu	BURTON,ASA A
00827311	BURTON	BRIANA	ASSISTANT PROFESSOR	briana.burton@wisc.edu	BURTON,BRIANA M

7. Select whether the access will be for SFS Production, Test environments, or both. For a list of security roles by module, click the **Role Catalog** hyperlink. To view roles currently assigned to the user, click the **Look-up User Roles** hyperlink. If needed, enter comments regarding why the access is being requested.

## SFS Security Role Request

Form Type SEC\_SFS\_02

Date Request Initiated 03/30/2021

Requestor 00857570 ANDERSON,KIRK Requestor Email KANDERSON@UWSA.EDU

Empl ID 00952004 BHATTARAI,KAVITA Employee Email KBHATTARAI@UWSA.EDU

Business Unit UWSYS UW System Wide

\*Dept ID 503700 Financial Operations

\*Supervisor 00759797 BURTON,NICOLA J Supervisor Email NBURTON@UWSA.EDU

Business Unit Admins  
 HINTZ,GINGER L Email: GHINTZ@UWSA.EDU  
 BEACH,CORA M Email: CBEACH@UWSA.EDU

Environment Production

Business Need/Additional Notes

\*Primary Permission List UWALL

[Role Catalog](#)

[Look-up User Roles](#)

8. In the **Roles to be Added/Removed** section, enter the roles, and the action that should be taken (Add or Remove). To search for a role, click the Magnifying glass under Role Name.

Note:

- “EMPLID to Copy” - Click the magnifying glass next to “Emplid to Copy” to copy roles from existing user.
- Remove All- Remove all roles in one click.

Emplid to Copy

Remove All

Roles To be Added/Removed

*Role Name	Category	SubCategory	Message Text	SOD Conflict	*Role Action	Description	Insert A Row	Delete A Row
1 <input type="text"/> <input type="button" value="Q"/>							<input type="button" value="+"/>	<input type="button" value="-"/>

9. Click **Search Criteria** to expand the search section. Click the magnifying glass next to Category and select General User.

Cancel Lookup

Search for: Role Name

▼ Search Criteria Show Operators

Role Name (begins with)

Category (begins with)

SubCategory (begins with)

Description (begins with)

▼ Search Results

## SFS Security Role Request

**Cancel** **Lookup**

Search for: Category [Show Operators](#)

▼ **Search Criteria**

Category (begins with)

▼ **Search Results** 4 rows

Category ▾

GENERAL USER
SFS TEAM
TECH
UWSA

10. Click the magnifying glass next to Subcategory. Select the Subcategory for the role that will be added/removed.

**Cancel** **Lookup**

Search for: Role Name [Show Operators](#)

▼ **Search Criteria**

Role Name (begins with)

Category (begins with) GENERAL USER

SubCategory (begins with)

Description (begins with)

▼ **Search Results**

11. Click Search and the roles under that Category/Subcategory will be shown. Select the role to be added/removed.

# SFS Security Role Request

[Cancel](#) Lookup

Search for: SubCategory [Show Operators](#)

▼ **Search Criteria**

Category GENERAL USER

SubCategory (begins with)

▼ **Search Results**

11 rows

SubCategory
AM
AP
ARBI
EX
GL
GM
OTHER
PCARD
PO
RPT
SHOPUW+



# SFS Security Role Request

**Cancel** **Lookup**

Search for: Role Name

▼ **Search Criteria** [Show Operators](#)

Role Name (begins with)

Category (begins with) GENERAL USER

SubCategory (begins with) SHOPUW+

Description (begins with)

▼ **Search Results**

269 rows

Role Name	Category	SubCategory	Description
ADM_QRPT	UWSA	RPT	ADM Query - Private FIN_RPT
ALLBUUPL	UWSA	GL	Journal upload - all BUs
ALLPNLS	SFS TEAM	OTHER	All Panels
ALL_JRNL	UWSA	GL	load journals
ATTRB_FD	UWSA	GL	fund attributes
AUDIT	UWSA	OTHER	Auditor
BRMILQRY	GENERAL USER	AP	MIL Query - Bursar Office
CEN_MNT	SFS TEAM	OTHER	Central Maintenance
CEN_MNT	UWSA	OTHER	Central Maintenance
CLOSEPER	UWSA	GL	CLOSE ACCOUNTING PERIODS

# SFS Security Role Request

Cancel Lookup

Search for: Role Name

▶ Search Criteria

▼ Search Results

15 rows

Role Name	Category	SubCategory	Description
UW_UNV_JG_APPROVER	GENERAL USER	SHOPUW+	APPROVER
UW_UNV_JG_AP_MANAGER	GENERAL USER	SHOPUW+	AP_MANAGER
UW_UNV_JG_AP_PROFESSIONAL	GENERAL USER	SHOPUW+	AP_PROFESSIONAL
UW_UNV_JG_CATALOG_ADMIN	GENERAL USER	SHOPUW+	CATALOG_ADMIN
UW_UNV_JG_CONTRACT_ADMIN	GENERAL USER	SHOPUW+	CONTRACT_ADMIN
UW_UNV_JG_CONTRACT_MANAGER	GENERAL USER	SHOPUW+	CONTRACT_MANAGER
UW_UNV_JG_CONTRACT_SYS_ADMIN	GENERAL USER	SHOPUW+	CONTRACT_SYS_ADMIN
UW_UNV_JG_DELEGATE_AP_CLERK	GENERAL USER	SHOPUW+	DELEGATE_AP_CLERK
UW_UNV_JG_PURCHASING_BUYER	GENERAL USER	SHOPUW+	PURCHASING_BUYER
UW_UNV_JG_PURCHASING_DIRECTOR	GENERAL USER	SHOPUW+	PURCHASING_DIRECTOR
UW_UNV_JG_REQUESTER	GENERAL USER	SHOPUW+	REQUESTER
UW_UNV_JG_SOURCING_ADMIN	GENERAL USER	SHOPUW+	SOURCING_ADMIN
UW_UNV_JG_SUPPLIER_ADMIN	GENERAL USER	SHOPUW+	SUPPLIER_ADMIN
UW_UNV_JG_VIEW_ONLY	GENERAL USER	SHOPUW+	VIEW_ONLY

12. Select the action to be taken, either Add or Remove. Review the role description to confirm that the correct role was selected. If additional roles are needed, click the “+” button and repeat steps 8-11.

Note:

- Certain roles have been deemed high privilege and will require additional approval from either the financial director or technical manager.
- Certain APPO roles have SOD (Separation of duties) Conflict.

Empid to Copy  Remove All  No

Roles To be Added/Removed

Role Name	Category	SubCategory	Message Text	SOD Conflict	Role Action	Description	Insert A Row	Delete A Row
1 UW_UNV_JG_REQUESTER	GENERAL USER	SHOPUW+		CONFLICT	Add	REQUESTER	+	-
2 UW_UNV_AP_POWER	GENERAL USER	AP	WARNING High privilege role	CONFLICT	Add	UW Custom Functional Role This role grants AP Power users	+	-
3 <input type="text"/>					Add Remove		+	-

## SFS Security Role Request

13. If you are requesting access for yourself, change the acknowledgement button to Yes, agreeing to the terms of the form. If you are requesting access for someone else, they will acknowledge the terms when the form is routed to them for approval.

- If needed, expand the Comments section to add any additional notes regarding this request. Click the Submit button to begin the approval workflow process.
- If you are requesting access for yourself, an email will be sent to your supervisor, asking for their approval. If you are requesting access for someone else, the approval request will first go to that individual and then to their supervisor.
- Access will be auto provisioned/ deprovisioned in production environment as soon as approval process is completed.

The screenshot shows a web form titled "Action Items" with a sub-section "Acknowledgement". The Acknowledgement section contains a "Yes" button, which is highlighted with a red box. Below the button is a paragraph of terms and conditions. Below the terms is a "Comments" section with a red arrow pointing to it. At the bottom of the form are three buttons: "Search", "Save", and "Submit", with a red arrow pointing to the "Submit" button.

**Action Items** 1 row

**Acknowledgement**

1  Yes

Terms: Your use of University of Wisconsin computing resources is restricted to authorized University of Wisconsin business. You may only access computing resources for which you have specific authorization and only in accordance with authorized business need. Your password verifies your login identification (Login ID) and is intended for your use alone. You are responsible for keeping it confidential and for changing your password based on your campus security policy. If you suspect someone else knows your password, change it immediately. Intentional violation of this agreement may result in disciplinary action, legal action or both. You may be held responsible for any willful and deliberate misuse, system damage or security breach, that is traceable to your assigned Login ID. Confidentiality Agreement. By signing this form I certify I am a user of SFS data and I agree to abide by the state and federal laws and University of Wisconsin policies that apply to the proper use of data. For more information see: Wisconsin Public Records Law <https://www.wisconsin.edu/general-counsel/legal-topics/records/> Records Management: <https://www.wisconsin.edu/regents/policies/university-of-wisconsin-system-public-records-management/>

▼ **Comments**