

Financial Systems Access at UCSF

Governing Policies

- **General**

Access to and use of University electronic information resources must be performed in a manner that ensures the confidentiality, integrity, and availability of University resources and must be conducted in full compliance with federal and state law and University policies. (BFB IS-11, *Identity and Access Management*)

 - Access to certain resources may only be granted to individuals who have been authorized to have such access.
 - ***Access authorization shall be limited, using technical or procedural controls, to the least permission necessary for the performance of duties.*** (BFB IS-3 *Electronic Information Security*)
- **Access Administrators** and Central Campus units that grant access to financial and personnel data are responsible for:
 - Ensuring that access is granted in accordance with University of California policies and that only Authorized and Authenticated staff is granted access.
 - Periodic review of work by staff with access to confidential data to ensure such data is secured and not inappropriately shared or misused.
 - Fully informing staff of their responsibility to hold such information confidential. (BFB IS-3, *Electronic Information Security*)
 - ***Timely review of access privileges and for revoking access privileges upon termination or when job duties no longer require a legitimate business reason for access.*** (BFB IS-11, *Identity and Access Management*, BFB IS-3, *Electronic Information Security*)
- **Disclosure and Release of Information**

Sharing of sensitive electronic information with University administrative units is allowed for legitimate business needs. However, permission for access to information or release and/or disclosure of information should be granted in conformance with University policy and applicable laws by the University authority that has been assigned overall management responsibility for the information. (BFB IS-2, *Inventory, Classification, and Release of University Electronic Information*)

Access Privilege Types at UCSF

- **Department Plus**
 - Department Plus access restricts the user to access those financial resources owned by a specific Department Code and by any subordinate (children in the organizational Department Code structure) Department Code(s).

- A Department Code is associated with all financial resources- Department Account (DPA), Funds, Assets and Employees.
- Users with Department Plus access have the ability to access financial data by DPA, Fund or DPA/Fund as long as their Department Code is associated with either the DPA or the Fund or both DPA and Fund. This also applies to Employee Data Base information.
- **Universal**
 - Universal access does not restrict the user access to a specific Department Code. This access allows the user to access all campus financial resources.
 - Universal access is restricted to Central users and requires the Controller's Office to authorize access, both logical and physical, to only those individuals who have a legitimate business reason to access specific Resources (BFB IS-3, Electronic Information Security) in order to:
 - Provide global customer support for cross-department information
 - Review, analyze and maintain data integrity and quality
 - Research and provide reporting for global inquiries
 - Provide global responses for inquiries on data outside the central unit's immediate area of responsibility for external and internal entities
 - Perform daily job responsibilities
 - Facilitate management of institutional assets

Financial Systems and Data

- For more information on these systems, go to the [OAAIS Service Catalog](#).
- **WebLinks (WL)**
 - General Ledger (GL)
 - Accounts Payable/Purchase Orders (AP/PO)
 - Employee Data (EDB)
 - Department Payroll Expense (DPE)
- **PeopleSoft (PS)**
 - Asset Management
 - Procure to Pay (P2P)
 - General Ledger
 - Research Administration
- **OnLine Payroll/Personnel (OLPPS)**
 - OLPPS Entry/Update
 - OLPPS Inquiry
 - OLPPS Payroll Time Reporting (OPTRS) Entry/Update
 - Evaluate - Resident and Fellow Systems (RFS) Entry/Update
 - RFS Inquiry
 - Web Merit

- **Effort Reporting System (ERS)**
 - Certification
 - Coordinator
 - Reviewer
- **Account Fund Profile (AFP)/Department Code (DEP)**
 - AFP/DEP Entry/Update
 - AFP/DEP Inquiry

System Access by Application

Application	Definition	Access Levels	Notes
WebLinks			
<ul style="list-style-type: none"> • General Ledger • Accounts Payable/ Purchase Orders • Employee Data • Department Payroll Expense 	<ul style="list-style-type: none"> • A user can be granted access to all four areas or individual areas dependant on need to have access to the data based on job responsibilities 	<ul style="list-style-type: none"> • Universal Note: Access privileges to Ad Hoc are the same as WebLinks. • Department Plus 	<ul style="list-style-type: none"> • Universal access is restricted to Central Units and requires Controller's Office approval • Departments can grant access to users outside their department code
PeopleSoft			
<ul style="list-style-type: none"> • Asset Management • P2P • Journals/General Ledger 	<ul style="list-style-type: none"> • Central Unit System • Distributed to the campus • Distributed to the campus 	<ul style="list-style-type: none"> • Access is defined by type of user in PS, limited to the Controller's Office • Accounts Payable and Procurement access is defined by type of user • Departments have entry update access to create requisitions, review, match and approve as defined by the P2P processes • Departments have access to create journal transactions outside their department organizational structure and to view all lines of journals • Query function is only available to Central Unit 	<ul style="list-style-type: none"> • Departments have access to data in WebLinks • Departments have the ability to retrieve journal lines in WebLinks that fall within their Department Plus access. • The full journal (all lines) can be viewed in PS Journals

Application	Definition	Access Levels	Notes
PeopleSoft (continued)			
<ul style="list-style-type: none"> Research Administration (RAS) 	<ul style="list-style-type: none"> Distributed to the campus 	<ul style="list-style-type: none"> Department access is restricted by the department code organizational structure Award and Contract Setup, Billing, and Accounts Receivable access is limited to central units and is defined by type of user 	
OnLine Payroll/Personnel			
<ul style="list-style-type: none"> OLPPS Entry/Update 	<ul style="list-style-type: none"> Distributed to the campus 	<ul style="list-style-type: none"> Allows entry/update access of EDB based on Department Code by <ul style="list-style-type: none"> Academic Non-Academic Student Non-Student 	<ul style="list-style-type: none"> Universal requires Controller's Office approval
<ul style="list-style-type: none"> OLPPS Inquiry 	<ul style="list-style-type: none"> Distributed to the campus 	<ul style="list-style-type: none"> Allows inquiry access of EDB-same as Entry/Update 	<ul style="list-style-type: none"> Universal requires Controller's Office approval
<ul style="list-style-type: none"> OLPPS Payroll Time Rptg Entry/Update 	<ul style="list-style-type: none"> Distributed to the campus 	<ul style="list-style-type: none"> Allows entry/update access of EDB based on Department Code 	
<ul style="list-style-type: none"> Evalue - RFS Entry/Update 	<ul style="list-style-type: none"> Available to SOM only 	<ul style="list-style-type: none"> Allows entry/update access to Time Reporting for SOM Departments only at the Department Code level 	<ul style="list-style-type: none"> Access granted only by the SOM Dean's Office-Graduate Division
<ul style="list-style-type: none"> Evalue - RFS Entry/Update 	<ul style="list-style-type: none"> Available to SOM 	<ul style="list-style-type: none"> Same as Entry/Update 	
<ul style="list-style-type: none"> Web Merit 	<ul style="list-style-type: none"> Distributed to the campus and enables access to Web merit screens 	<ul style="list-style-type: none"> Distributed to Control Points and to Departments to update merit based data 	<ul style="list-style-type: none"> Only organizational Control Points are granted Control Point level access
Effort Reporting			
<ul style="list-style-type: none"> Effort Reporting (ERS) 	<ul style="list-style-type: none"> Distributed to the campus Allows access by type of role 	<ul style="list-style-type: none"> Self-Certifier – view/edit/certify ER, view PR for their own effort PI/Academic – view/edit/certify ER, view PR for all his/her DPA/Funds Reviewer – view/edit ER, view PR for DPA/Funds within Department Codes 	<ul style="list-style-type: none"> When a role is established for user Department Code(s) are assigned to the user

Application	Definition	Access Levels	Notes
Effort Reporting (continued)			
<ul style="list-style-type: none"> Effort Reporting (ERS) 		<ul style="list-style-type: none"> Coordinator – view/edit ER for DPA/Funds within Department Codes Viewer – view ER for DPA/Funds within Department Codes 	
Account Fund Profile (AFP)/Department Code			
<ul style="list-style-type: none"> AFP/DEP Entry/Update AFP/DEP Inquiry 	<ul style="list-style-type: none"> Not distributed to the campus Available for campus view 	<ul style="list-style-type: none"> Access to entry/update is limited to certain Controller's Office staff Not restricted-generally given to staff who have OLPPS access 	<ul style="list-style-type: none"> AFP/DEP inquiry is available in WebLinks for all users. There is no restriction

Getting Access-Guidelines and Submission

Go to the OAAIS Service Catalog for autoAccess at:
http://oaais.ucsf.edu/service_catalog/2769-DSY.html for the following systems:

- **OLPPS**
- **RFS**
- **Web Merit**
- **AFP/DEP**
- **WebLinks – Department Plus**

Go to the Controller's Office System Access page at:
http://acctg.ucsf.edu/peoplesoft/system_access/system_access.htm for the following systems:

- **PeopleSoft** applications (RAS, Journals, AP, P2P)
 - **Effort Reporting System (ERS)**
 - **WebLinks – Universal**
- Note: All WebLinks Universal Access must be submitted to and approved by the Controller's Office.