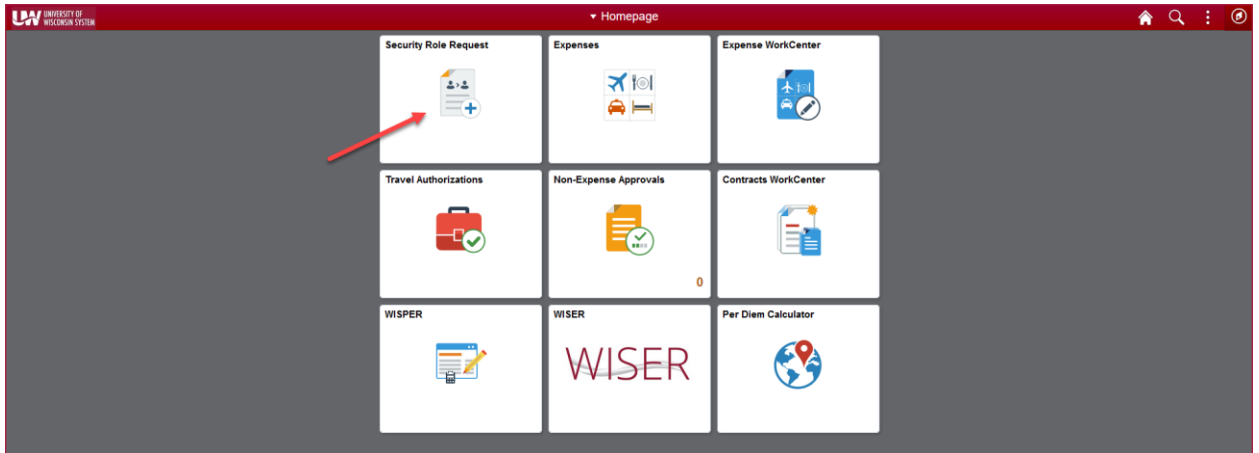
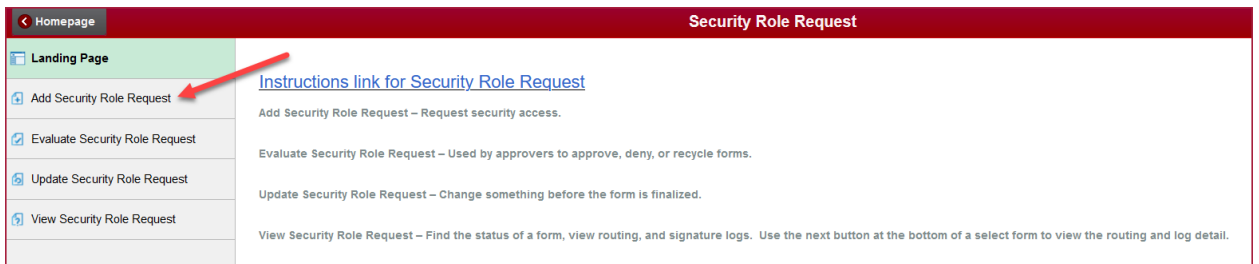


SFS Security Role Request

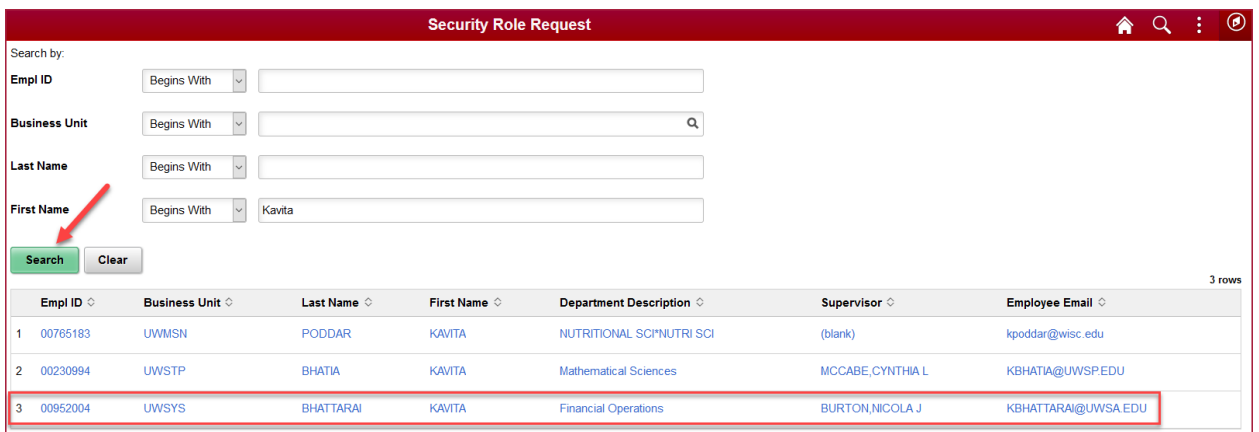
1. Click the following link to Navigate to SFS, <https://portal.sfs.wiscconsin.edu/>
2. On the SFS homepage, click the **Security Role Request** tile.



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.



SFS Security Role Request

- 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.

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.
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.

Lookup

Search for: Supervisor

Search Criteria Show Operators

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

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@UWWW.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

SFS Security Role Request

- 7. Select whether the access will be for SFS Production, Test environments, or both. Then enter notes regarding why the access is being requested. For a list of the roles currently assigned to the user, click the **Current User Roles** hyperlink.

Note: Business Need/Addition Notes is not a mandatory field.

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 00759797 BURTON,NICOLA J Supervisor Email NBURTON@UWSA.EDU
Business Unit Admins LARSON,SCOTT C Email: SLARSON@UWSA.EDU
PEREZ-GOMEZ,JOSE Email: JPerez@UWSA.EDU
Environment Production
Business Need/Additional Notes
*Primary Permission List UWALL

- 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.

Environment Production
Business Need/Additional Notes
*Primary Permission List UWALL
Current User Roles
Roles To be Added/Removed
1 row
*Role Name Category SubCategory Message Text *Role Action Description Insert A Row Delete A Row
1 [] [] [] [] [] [] [] [] [] []

- 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 Clear
Search Results

SFS Security Role Request

Cancel **Lookup**

Search for: Category

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

Category (begins with)

Search **Clear**

▼ **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

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

Role Name (begins with)

Category (begins with) GENERAL USER

SubCategory (begins with)

Description (begins with)

Search **Clear**

▼ **Search Results**

Cancel **Lookup**

Search for: SubCategory

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

Category GENERAL USER

SubCategory (begins with)

Search **Clear**

▼ **Search Results**

11 rows

SubCategory ▾

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

SFS Security Role Request

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

Lookup

Search for: Role Name Show Operators

Search Criteria

Role Name (begins with)

Category (begins with) GENERAL USER

SubCategory (begins with) GL

Description (begins with)

Search Results 30 rows

Role Name	Category	SubCategory	Description
JRN_GEN	GENERAL USER	GL	Journal Generator
MSNCLOSE	GENERAL USER	GL	close msn periods
TREE_UPD	GENERAL USER	GL	TREE MANAGER UPDAT
UW Tuition Rem Admin	GENERAL USER	GL	Tuition Remission Admin
UWGL_Tuition_Rem_User	GENERAL USER	GL	Tuition Remission User
UW_EAU_GL_CF_WORKADMIN_WF	GENERAL USER	GL	UW GL CF WF Admin - UWEAU
UW_GBY_GL_CF_WORKADMIN_WF	GENERAL USER	GL	UW GL CF WF Admin - UWGBY
UW_MIL_GL_CF_WORKADMIN_WF	GENERAL USER	GL	UW GL CF WF Admin - UWMIL
UW_MIL_GL_JE_WORKADMIN_WF	GENERAL USER	GL	UW GL JE WF Admin - UWMIL

12. Select the action to be taken, either Add or Remove. If additional roles are needed, click the “+” button and repeat steps 8-11.

Roles To be Added/Removed 1 row

*Role Name	Category	SubCategory	Message Text	*Role Action	Description	Insert A Row	Delete A Row
1 <input type="text" value="UW_UNV_GL_INQ"/> <input type="button" value="Q"/>	GENERAL USER	GL		<input type="button" value="+"/> Add Remove	UW Custom Functional User Grants a user access to inquire on all GL	<input type="button" value="+"/>	<input type="button" value="-"/>

Comments

13. 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.

SFS Security Role Request

Roles To be Added/Removed

Role Name	Category	SubCategory	Message Text	Role Action	Description	Insert A Row	Delete A Row
1 UW_UNV_GL_INQ	GENERAL USER	GL		Add	UW Custom Functional User Grants a user access to inquire on all GL	+	-

▼ Comments

Search Save Submit

1 row