PeopleSoft IR-#10

LSUSH - FINANCIAL SUPER USERS & THE HELP-DESK

Scope:

This PeopleSoft (PS) Information Release (IR) applies to the LSUSH End-User Financial Community.

Purpose:

The purpose is to provide an understanding of how the LSUSH End-User Financial Community are to communicate their need for assistance within the various modules of the Financial System through the Module's Super-Users and then upward to the Advanced Help-Desk (AHD). In addition, this IR identifies specific items required when any Department initiates any request for Security Access to the PeopleSoft Financial System.

Module:

The IR affects the following modules in the Financials System of Production and Reporting: Accounts Payable Module, Asset Management Module, General Ledger Module, Grants Accounting (Billing & Receivables) Module, Inventory Module, and Purchasing Module.

Source:

The source of this IR is a result of a Training enhancement tool.

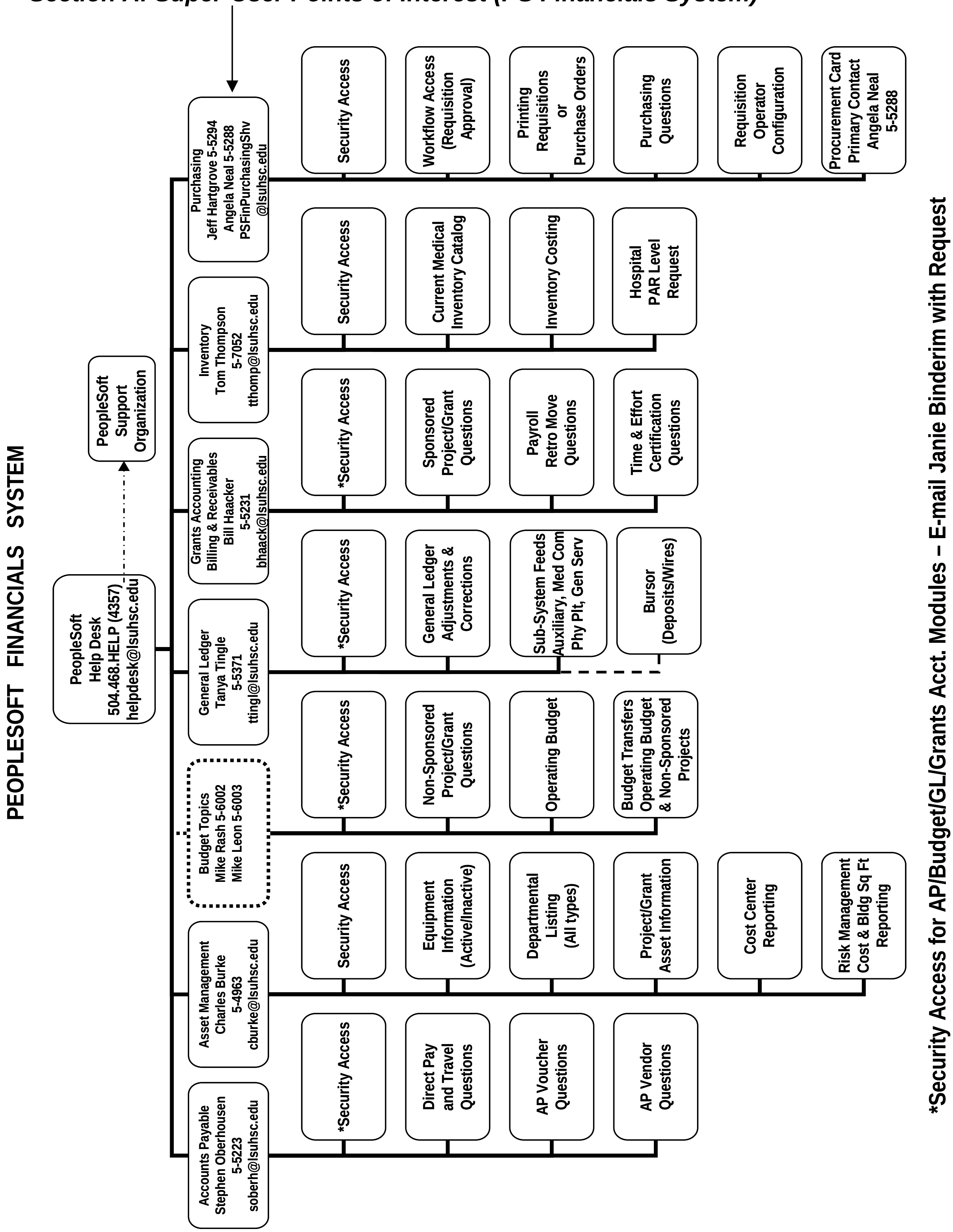
Procedures

Parameters **–** The following must exist for these procedures to be successful:

End-User: Possesses proper Security Access within the PeopleSoft Financial System for either Production (PSFSPRD) or Reporting (PSFSRPT).

Navigation & Process Overview

Section A: Super-User Points of Interest (PS Financials System)



The **Super-User Points of Interest** exists to identify key issues the End-User may experience in their daily operation within the PeopleSoft Financial System. All questions, concerns, and difficulties encountered while working in any of the designated Modules will be directed toward the appropriate Super-User of that Module.

The Super-User will:

- Assist with all items identified to the best of their abilities.
- Elevate to the **Help-Desk** any items unable to resolve by opening a Help Ticket.
- Designate an alternate Point of Contact for any extended periods when the Super-User is not available.
- Notify PeopleSoft Support Team on designated alternate
- Determine if the situation is an isolated (End-User) occurrence or if it is a Campus wide (System) situation

The End-User will:

- E-mail the appropriate Module Super-User (highly suggested for follow-up)
- Include pertinent information for Super-User to be able to contact End-User.
- Provide as much detail as possible regarding the issue.

PeopleSoft Security Access is the most common issue LSUSH End-Users will encounter in any Module and the End-User will need to submit information to the Module's Super-User.

The following outlines the basics for initiating any request for Security Access to the PeopleSoft Financial System by the Department for the End-User:

- Computer Account (NT Account) is established - Bases for E-mail, Citrix, and PS.
  - Local Computer Support Services provides Application or may be download from http://www.sh.lsuhsc.edu/infotech/ocs/userservices/desktop/Supportinfo/Computer%20Account%20Apps.pdf
  - When completed a **UserID** is established for the End-User (essential item).

- PeopleSoft Access request to the Super Users must include the following:

  NOTE: The E-mail request should include the <u>User's full name in the Subject field</u>.

  - Name: Users Full Name
  - SSN: Last 4 digits
  - PS EmplID: May be provided in substitution of SSN
  - LSU ID: User's NT ID
  - Instance: PSFSPRD and/or PSFSRPT (Production and/or Reporting)
  - Row Level: LSUSH
  - Panel Class: Super-User will assign based on Module
  - Authorized by: User's Supervisor, Business Manager, or Department Head/Chairman.

<u>NOTE</u>: For the General Ledger Module and Grants Accounting Module (also Budget Topics) all Security Access request are submitted to Janie Binderim for processing.

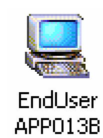
Section B: Pre-Help-Desk Checklist

There will be times when an End-User will have to contact the **Help-Desk** (504.568.help) directly. When that time comes, there are certain items that should be known and/or accomplished prior to contacting the **Help-Desk**. All this information is essential to initiate a "Help Ticket" for the End-User.

When either Calling or E-mailing your request for assistance, the End-User needs to provide the following information:

Help-Desk Checklist
(Phone or E-mail)

- ☐ Full Name
- ☐ User ID
- ☐ Phone Number (include Area Code)
- ☐ Business Unit (LSUSH)
- ☐ Apps Server
  (Located on left side of screen, 1st column of icons)



- ☐ User has cleared Cache
  (Accomplished from the PS Launcher)
- ☐ Financial Database (PSFSPRD or PSFSRPT)
- ☐ Financial Module active. (Purchasing, Inventory, etc.)
- ☐ Brief description for contacting Help-Desk
- ☐ If User chooses to E-mail the Help-Desk, it is very important the same information above is included, especially a Phone Number with Area Code and must include the User's Full Name in the Subject field of the E-mail.

Section C: Reasons to Call the Help-Desk (AHD) direct

Since the **Super-User Points of Interest** identifies some major key issues the End-User may experience in their daily operation within the PeopleSoft Financial System; there may be reasons the End-User will have contact the **Help-Desk** (504.568.HELP) themselves.

Again run the **Pre-Help-Desk Checklist** prior to contacting the **Help-Desk** either by phone or e-mail.

Topics for which the End-User may contact The Help-Desk Directly

- Experiencing Performance Issues ("hour-glass" for an extended period, etc.)
- Lost connection to an Apps Server
- Experiencing System Slow-down ("keying-in" data sluggishly)
- Workflow difficulty
- PeopleSoft Launcher problems.
- User Profile difficulty (Reported by the Super-User to Help-Desk)

Section D: Reasons Local Computer Support is required

There are instances when the End-User experiences some form of difficulty while attempting to work in the PeopleSoft Financial System and a call to the **Local Computer Support** group (extension 5-5470, option 2) is all that is required.

Topics for which the End-User may need to contact Local Computer Support

- Unable to connect to Citrix (Local Network connectivity issue)
- Reset Password because:
  - Password has expired or
  - "Account is Locked" message displays.
- List of Printers compatible with the Citrix Application
- End-User is unable to Print a job in Citrix due to:
  - Department purchased new Printers or
  - Department relocated to new location without the Printers
- New employee needs the Citrix application installed.

While the above list is not all inclusive, please report any new experiences to the PeopleSoft Support Team for inclusion on future updates.

Questions/Comments:

Refer all questions or comments via e-mail to the **PS Training Department**.