Section 1: Overview

Introduction to PAC Security

The PAC Security Handbook is designed to assist administrators in the schools and departments who need to either request or approve system access to People @ Columbia (PAC).

This handbook describes the various roles available to departments to transact within PAC, and the application process. All security role requests must be approved by both the requestor’s manager and the Departmental Authorization Function (DAF) Administrator for the School/Admin Unit to which access is being requested.

Approval roles for certain PAC transactions are governed by the same policy that governs DAF authority in the financial systems and is a critical component of the University’s control system. It assigns levels of authority to University employees to approve key transactions on the University’s behalf. Please review and familiarize yourself with the Departmental Authorization Function policy for the University. The DAF policy can be found in the University Policy Library at http://policylibrary.columbia.edu/departmental-authorization-function.

Note: Requesting PAC access does not give a user access to the FDS Payroll Reports (payroll summary, payroll detail, etc). Access to these reports is managed through PAD access in FinSYS, and you must request PAD access on the Financial Systems Security Application (available on the ServiceNow homepage).

Overview of PAC

People @ Columbia (PAC) is the customized version of PeopleSoft that integrates and processes all Human Resources and Payroll transactions for Columbia University. The following functionality is available via PAC:

- Manager Self-Service
  - All of the faculty and staff information in the department(s) to which you have access will appear on the Job and Personal Information page in PAC. Here you can view personal information such as email address, birthday, and emergency contact, view job information such as check address and job summary and edit other information such as home or office address and phone number.

- Template-Based Hiring
  - Template-Based Hire is a function within PAC where new hire and rehire transactions are initiated electronically in the departments and schools through online templates. A document attachment feature allows you to attach any documents necessary, and the electronic workflow allows for a paperless approval process.

- Labor Accounting
  - Labor Accounting functionality enables schools and departments to manage employee salary distribution profiles, additional compensation, and cost transfers through the (PAC) system.

PAC Access Policy

- 90-Day Password Expiration
  - Columbia University requires that all users of PeopleSoft applications change their password every 90 days to ensure the protection of sensitive personal and payroll data of all faculty and staff.

- Restriction from Accessing Your Own Job Record
  - You are not allowed to view your own job information in Manager Self-Service; your supervisor must generate any Personnel Action Forms (PAFs) that are required for your position. Further, you are not allowed to approve Labor Accounting transactions for yourself; your supervisor or other appropriate labor accounting approver must approve the transaction.

- Department Changes
  - If you change departments (e.g., transfer to a new department), your PAC access is automatically removed. This includes transfers between levels 6, 7 and 8 within the same home department. To reinstate your access, please complete a new security application once the transfer has been completed in PAC.
Overview of Security Roles
A security role is the specific authorization given to a user to enable him/her to view and transact on employee data. A user’s security roles define the activities a user can complete, including:

- Initiating transactions in PAC and Labor Accounting
- Approving template-based hire and labor accounting transactions
- Viewing data and reports in PAC

Applying for Security Access
Security roles are obtained by completing the People @ Columbia Security Application which can be found in ServiceNow.

All PAC security roles must be formally requested using this application and approved by both the requestor’s manager and by the Departmental Authorization Function (DAF) Administrator for the School/admin Unit to which access is being requested.

If you are unsure which DAF Department to select for your department(s), you can look up the DAF Administrator Group by department on the “DAF by Department” list available on the Finance Gateway at http://finance.columbia.edu/content/daf-administrators-dept.

Successfully Complete Required Training
A user’s security access will only be granted once all training requirements for the roles requested on the application have been completed. The user will receive an email from the PAC Training Administrator when security access is requested, to provide more information about the training curriculum. The user will then need to complete any required training before security roles can be assigned.

All PAC training can be accessed via the Course Catalog on the HR Website.
Section 2: People @ Columbia (PAC) Roles

Components of Security

PAC system security is comprised of three basic types of access:

- **Page Access**: Defines the *pages* a user can navigate to in PAC and the transactions a user can view/initiate. These are typically the initiator roles and the Manager Self-Service role. Examples of page access roles include Manager Self-Service, Template-Based Hire Initiator and Accounting Initiator.

- **Workflow Access**: Defines the *approval* authority a user has for transactions on the related Pages. Workflow routing is based on the departments in the transaction and the type of employee on which you are transacting. *Note: not all users will have workflow access (e.g., Initiator roles).*

- **Department Access**: Defines the *employee records* to which a user has access to view and report on. Department access in PAC is required on the application.

The following tables describe the role(s) and associated training for PAC.

<table>
<thead>
<tr>
<th>I Need To…</th>
<th>Page Role Required</th>
<th>Workflow Roles Required</th>
<th>Functionality</th>
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</thead>
<tbody>
<tr>
<td>View and update employee job and personal data</td>
<td>Manager Self-Service <em>(section 2.1 of PAC Security Application)</em> – <em>role type of &quot;Departmental Transactions and Reporting&quot; must be selected in section 1.3 to view section 2).</em></td>
<td>None</td>
<td>Allows you to view and print PAFs, update job and personal data for the employees in the departments to which you have access. This role also gives you the ability to run all MSS reports, Labor Accounting Reports, and HR data reports (in the HR Data Store). <em>This role is automatically granted if you request either Template-Based Hire Approver or Additional Compensation Approver.</em></td>
</tr>
<tr>
<td>View and update employee job and personal data – including e-Termination (eTerm)</td>
<td>Enhanced Manager Self-Service (eMSS) <em>(section 2.1 of PAC Security Application)</em> – <em>selecting eMSS role automatically includes the MSS role)</em></td>
<td>None</td>
<td>In addition to the functionality listed under Manager Self-Service this role gives you the ability to electronically submit a termination for academic and administrative employees.</td>
</tr>
</tbody>
</table>
| Provide 1st Level (Department) Approval for eTerm Transactions | Template-Based Hire Approver | Academic Terminations: Select Approver Level and Type = 1st (Dept) Level TBH - Academic  
Administrative Terminations: Select Approver Level and Type = 1st (Dept) Level TBH - Administrative | Allows you to approve (at the 1st level) eTerm transactions for employees terminated in departments to which you have access. *Notes: Approvers should also request the initiator role.*  
*There must be at least one 1st Level Approver and one 2nd Level Approver per department.* |
<table>
<thead>
<tr>
<th><strong>Provide 2&lt;sup&gt;nd&lt;/sup&gt; Level (School/Admin Unit) Approval for eTerm Transactions</strong></th>
<th><strong>Provide Both 1&lt;sup&gt;st&lt;/sup&gt; and 2&lt;sup&gt;nd&lt;/sup&gt; Level Approval for eTerm Transactions</strong></th>
<th><strong>Approve salary changes in eCompensation / view Salary Planning Reports in HRDS</strong></th>
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</thead>
<tbody>
<tr>
<td>Academic &amp; Administrative: Select both approver levels and types</td>
<td>Academic &amp; Administrative: Select both approver levels and types</td>
<td>Managerial Salary Planning (section 2.7 of PAC Security Application)</td>
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<tr>
<td>Academic Terminations: Select Approver Level and Type = 2nd (School) Level TBH – Academic</td>
<td>Academic Terminations: Select either the 1&lt;sup&gt;st&lt;/sup&gt; (Dept) Level TBH or 2&lt;sup&gt;nd&lt;/sup&gt; (School) Level TBH Academic – Approver Level and Type</td>
<td>None</td>
</tr>
<tr>
<td>Administrative Terminations: Select Approver Level and Type = 2nd (School) Level TBH - Administrative</td>
<td>Administrative Terminations: Select either the 1&lt;sup&gt;st&lt;/sup&gt; (Dept) Level TBH or 2&lt;sup&gt;nd&lt;/sup&gt; (School) Level TBH Administrative – Approver Level and Type</td>
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<tr>
<td>Allows you to approve (at the 2&lt;sup&gt;nd&lt;/sup&gt; level – School/Admin Unit) eTerm transactions for terminated employees in the departments to which you have access.</td>
<td>Allows you to approve eTerm transactions (at the 1&lt;sup&gt;st&lt;/sup&gt; level, 2&lt;sup&gt;nd&lt;/sup&gt; level or both) for terminated employees in the departments to which you have access.</td>
<td>User must have Manager Self-Service.</td>
</tr>
<tr>
<td>Notes: Approvers should also request the initiator role. There must be at least one 1&lt;sup&gt;st&lt;/sup&gt; Level Approver and one 2&lt;sup&gt;nd&lt;/sup&gt; Level Approver per department.</td>
<td>This is only allowed in very limited circumstances. Request will be reviewed by the PAC Data Custodian prior to setup. Request must be made using section 4 – Comments, on the PAC Security application.</td>
<td>The eComp Approver/Reporter role gives you the ability to approve salary changes in the eCompensation tool during the year-end salary planning process as well as generate Salary Reports from the HR Data Store.</td>
</tr>
<tr>
<td>Template-Based Hire Approver</td>
<td>Template-Based Hire Approver *only a 1&lt;sup&gt;st&lt;/sup&gt; or 2&lt;sup&gt;nd&lt;/sup&gt; level approver role and type can be selected. Select one and explain need for both in the Comments section.</td>
<td>Note: The role to enter salary changes is handled separately and outside of the PAC</td>
</tr>
<tr>
<td>Create ComboCodes in PAC</td>
<td>Create Combo Code (section 2.4 of PAC Security Application)</td>
<td>None</td>
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| Run MSS and Labor Accounting Reports (No Transaction roles) | Management Reporter (section 2.5 of PAC Security Application) | None | This role gives you access to run the MSS reports out of PAC, the Labor Accounting reports from PAC Reporting and the HR Data reports from the HR Data Store. 

*This role does not include transaction ability and is only for users who do not have Manager Self-Service or a Labor Accounting approver role. Those roles include reporting.* |
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<th>Workflow Roles Required</th>
<th>Functionality</th>
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<tbody>
<tr>
<td>Initiate Hire/Rehire Transactions</td>
<td>Template-Based Hire Initiator</td>
<td>None</td>
<td>Allows you to initiate hire/rehire transactions for the department(s) to which you have access.</td>
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<tr>
<td>Provide 1&lt;sup&gt;st&lt;/sup&gt; Level (Department) Approval for Hire/Rehire Transactions</td>
<td>Template-Based Hire Approver (includes Manager Self-Service)</td>
<td>Academic Hires: Select Approver Level and Type = 1&lt;sup&gt;st&lt;/sup&gt; (Dept) Level TBH - Academic &lt;br&gt;Administrative Hires: Select Approver Level and Type = 1&lt;sup&gt;st&lt;/sup&gt; (Dept) Level TBH - Administrative &lt;br&gt;Academic &amp; Administrative: Select both approver levels and types</td>
<td>Allows you to approve (at the 1&lt;sup&gt;st&lt;/sup&gt; level) hire/rehire transactions for employees hired into the departments to which you have access, and for hires in other departments who are being charged to your department (as the foreign funding approver). &lt;br&gt;&lt;br&gt;Notes: Approvers should also request the initiator role. &lt;br&gt;There must be at least one 1&lt;sup&gt;st&lt;/sup&gt; Level Approver and one 2&lt;sup&gt;nd&lt;/sup&gt; Level Approver per department.</td>
</tr>
<tr>
<td>Provide 2&lt;sup&gt;nd&lt;/sup&gt; Level (School/Admin Unit) Approval for Hire/Rehire Transactions</td>
<td>Template-Based Hire Approver (includes Manager Self-Service)</td>
<td>Academic Hires: Select Approver Level and Type = 2&lt;sup&gt;nd&lt;/sup&gt; (School) Level TBH – Academic &lt;br&gt;Administrative Hires: Select Approver Level and Type = 2&lt;sup&gt;nd&lt;/sup&gt; (School) Level TBH - Administrative &lt;br&gt;Academic &amp; Administrative: Select both approver levels and types</td>
<td>Allows you to approve (at the 2&lt;sup&gt;nd&lt;/sup&gt; level – School/Admin Unit) hire/rehire transactions for employees in the departments to which you have access. &lt;br&gt;&lt;br&gt;Notes: Approvers should also request the initiator role. &lt;br&gt;There must be at least one 1&lt;sup&gt;st&lt;/sup&gt; Level Approver and one 2&lt;sup&gt;nd&lt;/sup&gt; Level Approver per department.</td>
</tr>
<tr>
<td>Provide Both 1&lt;sup&gt;st&lt;/sup&gt; and 2&lt;sup&gt;nd&lt;/sup&gt; Level Approval for Hire/Rehire Transactions</td>
<td>Template-Based Hire Approver (includes Manager Self-Service) *only a 1&lt;sup&gt;st&lt;/sup&gt; or 2&lt;sup&gt;nd&lt;/sup&gt; level approver role and type can be selected. Select one and explain need for both in the Comments</td>
<td>Academic Hires: Select either the 1&lt;sup&gt;st&lt;/sup&gt; (Dept) Level TBH or 2&lt;sup&gt;nd&lt;/sup&gt; (School) Level TBH Academic – Approver Level and Type &lt;br&gt;Administrative Hires: Select either the 1&lt;sup&gt;st&lt;/sup&gt; (Dept) Level TBH or 2&lt;sup&gt;nd&lt;/sup&gt; (School) Level TBH Administrative – Approver</td>
<td>Allows you to approve hire/rehire transactions (at the 1&lt;sup&gt;st&lt;/sup&gt; level, 2&lt;sup&gt;nd&lt;/sup&gt; level or both) for the employees in the departments to which you have access. &lt;br&gt;&lt;br&gt;&lt;i&gt;This is only allowed in very limited circumstances. Request will be reviewed by the PAC Data Custodian prior to setup.&lt;/i&gt; &lt;br&gt;&lt;i&gt;Request must be made using section&lt;/i&gt;</td>
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<td>section</td>
<td>Level and Type</td>
<td>4 – Comments, on the PAC Security application</td>
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<td><strong>Academic &amp; Administrative:</strong> Select both the academic and administrative approver level and type for either level 1 or level 2 approver</td>
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<td>I Need To…</td>
<td>Page Role Required</td>
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<td>ADDITIONAL COMPENSATION (Section 2.3 of PAC Security Application)</td>
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<td>Training Required: All Add Comp roles require the following training courses:</td>
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<tr>
<td>Introduction to PAC (web-based training)</td>
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<tr>
<td>Additional Compensation Payment Transactions (web-based training and knowledge assessment)</td>
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<tr>
<td>Initiate Add Comp Transactions</td>
<td>Additional Compensation Initiator</td>
<td>None</td>
<td>Allows you to initiate add comp transactions for the employees in the department(s) to which you have PAC access and to employees outside of your home department.</td>
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<tr>
<td>Provide 1st Level (Department) Approval for Add Comp Transactions</td>
<td>Additional Compensation Approver (includes Manager Self-Service)</td>
<td>Academic Add Comp: Select Approver Level and Type = 1st (Dept) Level Add Comp – Academic</td>
<td>Allows you to approve (at the 1st level) add comp transactions for employees in the departments to which you have access. Allows you to approve add comp transactions charged to your department, for employees outside of your home department, as the foreign funding approver. Notes: All approvers should also have the initiator role. There must be at least one 1st Level Approver and one 2nd Level Approver per department.</td>
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<td>Administrative Add Comp: Select Approver Level and Type = 1st (Dept) Level Add Comp – Administrative</td>
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<td>Academic &amp; Administrative: Select both approver levels and types</td>
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<tr>
<td>Provide 2nd Level (School/Admin Unit) Approval for Add Comp Transactions</td>
<td>Additional Compensation Approver (includes Manager Self-Service)</td>
<td>Academic Add Comp: Select Approver Level and Type = 2nd (School) Level Add Comp - Academic</td>
<td>Allows you to approve (at the 2nd level) add comp transactions for employees in the departments to which you have access. Note: All approvers should also have the initiator role. There must be at least one 1st Level Approver and one 2nd Level Approver per department.</td>
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<td>Administrative Add Comp: Select Approver Level and Type = 2nd (School) Level Add Comp - Administrative</td>
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<tr>
<td>Provide Both 1st and 2nd Level Approval for Add Comp Transactions</td>
<td>Additional Compensation Approver (includes Manager Self-Service)</td>
<td>Academic Hires: Add Pay Acad Approver 1 Add Pay Acad Approver 2</td>
<td>Allows you to approve add comp transactions (at the 1st level, 2nd level or both) for the employees in the departments to which you have access. This is only allowed in very limited circumstances. Request will be reviewed by the PAC Data Custodian prior to setup. Request must be made using section</td>
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<td>Administrative Hires: Add Pay Admin Approver 1 Add Pay Admin Approver 2</td>
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<td>Academic &amp; Administrative: Select both the academic and</td>
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<td>*only a 1st or 2nd level approver role and type can be selected. Select</td>
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<tr>
<td>one and explain need for both in the Comments section.</td>
<td>administrative approver level and type for either level 1 or level 2 approver</td>
<td>4 – Comments, on the PAC Security application.</td>
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</table>


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<th>I need to…</th>
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<th>Workflow Roles Required</th>
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</thead>
<tbody>
<tr>
<td><strong>ACCOUNTING: SALARY DISTRIBUTION AND COST TRANSFERS</strong> (Section 2.4 of PAC Security Application)</td>
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<tr>
<td><strong>Training Required:</strong> All Accounting roles require the following training courses:</td>
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<tr>
<td>Introduction to PAC (web-based training)</td>
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<tr>
<td>Salary Distribution Transactions (web-based training and knowledge assessment)</td>
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<tr>
<td>Cost Transfer Transactions (web-based training and knowledge assessment)</td>
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<tr>
<td>Sponsored Projects Salary Cost Transfer Supplemental Training (web-based training and knowledge quiz)</td>
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<td></td>
</tr>
<tr>
<td><strong>Initiate Salary Distribution and Cost Transfer Transactions</strong></td>
<td>Accounting Initiator</td>
<td>None</td>
<td>Allows you to initiate salary distribution and cost transfer transactions for the employees in the department(s) to which you have PAC access.</td>
</tr>
</tbody>
</table>
| **Provide 1st Level Approval for Salary Distribution and Cost Transfer Transactions** | Accounting Approver | 1st (Dept) Level Accounting | Allows you to approve (at the 1st level) salary distribution and cost transfer transactions for employees in the departments to which you have access, and to approve salary distributions and cost transfers for employees outside your departments that are being charged to your department (foreign funding approver).  

*Note: All approvers should also have the initiator role.* |
| **Provide 2nd Level Approval for Salary Distribution and Cost Transfer Transactions** | Accounting Approver | 2nd (School) Level Accounting | Allows you to approve (at the 2nd level) salary distribution and cost transfer transactions for the employees in the departments to which you have access.  

*Note: All approvers should also have the initiator role.* |
| **Provide Both 1st and 2nd Level Approval for Salary Distribution and Cost Transfers.** | Accounting Approver | 1st (Dept) Level Accounting 2nd (School) Level Accounting | Allows you to approve (at the 1st level, 2nd level or both) salary distribution and cost transfer transactions for the employees in the departments to which you have access.  

*Note: All approvers should also have the initiator role.* |
Section 3: Completing the People @ Columbia (PAC) Security Application

Accessing the Application

The People @ Columbia (PAC) Security Application is available via the PAC Service Center Website.

1. Please go to [https://columbia.service-now.com](https://columbia.service-now.com) and log in with your UNI and Password.
2. You will be presented with the ServiceNow Homepage. In the left-hand menu, click the link to “Service Catalog.”
3. The application is also available via a link on the home page under “Security Application Requests”.

4. From the Service Catalog menu, click on “People @ Columbia (PAC) Security Application.”

Completing the Application

The PAC Security Application is divided into sections, each of which is outlined below.

Section 1: User Information

Section 1 collects information on the applicant (the user requesting access), the manager who will be the first approver of the request, the DAF administrator(s) who approve the request and the departments for which you are requesting access.

1.0 Primary Contact Information

The user selects either ‘phone’ or ‘email’ as their preferred contact method and the Contact Information field is auto-populated with the user’s information pulled from the University Directory. User can edit the phone number but not the email address.

1.1 Manager/Departmental Administrator Information

Enter your manager’s UNI, or the person in your department who is responsible for reviewing and approving the PAC roles requested. Once the UNI is entered, the Manager’s name is auto-populated.
1.2 User Type

Select the user type.

If either “Consultant/Temp” or “Columbia Affiliate” is selected, an Access Begin Date and Access Expiration Date are required. Please use the calendar icon to select the dates.

If “CU Casual” is selected, please enter the dates into the Comments section at the bottom of the form.

1.3 Access Type and Role

Access Type: Select the type of request from the dropdown options. New User – no system access currently; Update Access – will be added to existing access; Replace Access - deletes existing profile and replaces it with the new request.

Role: Select a Role
- Departmental Transaction and Reporting – used for department access
- Central Admin – used for Central Human Resources Administration (no department transactions). Select this to ensure that you can select the central user roles in section 3.

1.4 DAF Administrator

The DAF Administrator is the Senior Business Officer for the school/admin unit who is authorized to grant access to a certain set of departments.

Select the school/admin unit for the departments to which you are requesting access. For example, if you are requesting access to Chemistry, select Arts & Sciences from the menu. For a complete list of departments and the associated DAF Administrator group, go to: http://finance.columbia.edu/content/daf-administrators-dept

Note for Central Administrators: If you work in CU Human Resources (e.g., Benefits, HRIS, HRPC) or CU Payroll, “HR/Benefits/Payroll” automatically defaults as the DAF Administrator.
1.5 Access Departments

Select the node(s)/department(s) to which you require PAC access. The departments selected will apply to all roles in your PAC profile, and define the employee records that you can view and transact upon.

Note: at least one department must be selected and placed into the ‘List’ column for PAC access.

Select as many departments/nodes as required from the left column and click the “right facing” arrow to move them to the right column. User can also select multiple departments and can also remove department(s) not required by highlighting the department in the right column and clicking the “left facing” arrow.

Remember: If you are selecting a node (e.g., 404200X) this will give you access to that node, and all the departments underneath that node in the department tree.

You can use the search box to find a department in the list. Begin typing the department number and the list will filter, based on your search criteria.

Section 2: Departmental Transaction and Reporting Access

2.1 Manager Self-Service

Select Manager Self-Service if you require access to print PAFs, view employee job and personal information, etc.

This role also gives you access to all of the HR reports, including the PAC Labor Accounting reports (e.g., suspense report). This role by itself will not give you access to any of the Labor Accounting functions.

If you require e-termination, please also check the Enhanced MSS (eTerm) checkbox. Checking only the Enhanced MSS (eTerm) box automatically check the Manager Self-Service box.

2.2 Template-Based Hire

Select Template-Based Hire Initiator if you need to create and submit new hire and rehire transactions. This role does not give you any additional access to PAC (e.g., no approval, no PAF, no reporting).

Select Template Based-Hire Approver if you need to review and approve hire transactions for your department(s). Also select this role if you need to review and approve eTerm transactions for your department(s). Then select the Approver Level and Type of transactions to approve. For eTerm Approver access, indicate the approver level needed in the comments section. Note: The Template Based-Hire Approver role automatically requires you to have the MSS role.
2.3 Additional Compensation

Select Additional Compensation Initiator if you need to create and submit add comp transactions for employees within the departments to which you have access or to employees whose add comp transactions are being charged to departments to which you have access.

This role does not give you any additional access to PAC (e.g., no approval, no PAF, no reporting).

Select Additional Compensation Approver if you need to review and approve add comp transactions for your department(s). Then select the Approver Level and Type of transactions to approve. **Note:** The Additional Compensation Approver role automatically requires you to have the MSS role.

2.4 Accounting

Select Accounting Initiator if you need to create and submit salary distribution and cost transfer transactions for employees within the departments to which you have access.

This role does not give you any additional access to PAC (e.g., no approval, no PAF, no reporting).

Select Accounting Approver if you need to review and approve salary distribution and cost transfer transactions for your department(s). Then select the Approver Level and Type of transactions to approve. **Note:** this role does not give you access to Manager Self-Service functionality. However, this role does give you access to the Labor Accounting reports including the PAC Suspense Report.

Select the Create Combo Code role if you need to create new combo codes for your departments. With this role you can create combo codes for any combination of active chart fields for the departments to which you have access in PAC.

2.5 Reporting Only-No MSS or Transaction Roles

Select the Management Reporter role only if you do not have any other approval roles or Manager Self-Service. This role is for PAC users who have no other transaction roles, but need to view reports - MSS reports, Labor Accounting Reports, HR Data Reports from the HR Data Store.
2.6 Reviewer Roles

The Reviewer roles are only for certain users in CUMC Payroll, Faculty Affairs and the Provost’s Office.

2.7 Other

The eComp Approver/Reporter role gives you the ability to approve salary changes in the eCompensation tool during the year-end salary planning process as well as generate Salary Reports from the HR Data Store.

The Departmental Time Administrator role is used for Time and Labor (coming soon).

Section 3: Central Administration Access

Section 3 describes how to apply for Central Administration access roles that require special review and approval from CU Human Resources.

3.1 Central HR, Payroll, Benefits

Select Central Admin only if you work in Central Human Resources (e.g., HRIS), CU Payroll or CU Benefits. Your access request will be reviewed by the data custodian for these departments.

Once Central Admin is selected, the DAF department automatically defaults to “HR/Benefits/Payroll” and section 3.1 opens on the form. Be sure to add the department to the List and to select the department(s) you are requesting inquiry access to.
Section 4: Comments

Use the comments box to list any special requests, comments, or additional information that may be necessary for CUHR to process your access request.

Section 5: Terms of Agreement

Please read the terms of agreement outlined on the Security Application and click “User Acceptance”
Submitting the Application

Once you have completed all necessary sections of the application, and have agreed to the terms of the agreement, there is a two-step checkout process. 1st, click on the “Order Now” button to save the application in your shopping cart.

From the shopping cart, submit your request to the manager listed in section 1.1 by clicking on the “Checkout” button.

You can also edit your application at this stage by clicking the “Edit” button.

Once you have submitted the application, you will receive a request item number “RITM########”. You can use this number to reference your application with the Human Resources Service Center if you have any questions regarding the process.

You can also check the status of your application in the “Stage” column. This column appears once the form is submitted and can also be accessed from the “My Service Requests” page in Service Now. Hover the cursor over the circles for pop-up information on the status or click the blue arrow to expand the stages.

You will also receive an email confirming your submission. This email will provide information regarding the training required for the PAC roles you requested.
People @ Columbia Security Application – Manager Approval Process

All PAC security requests must be approved by the manager of the applicant. If you are listed as the manager on a PAC security request, you will receive an email notification instructing you to log into ServiceNow and approve, recycle or reject the application.

Steps to Review and Approve a PAC Security Application

1. Log into ServiceNow using the link provided in the email.

2. In the left-hand menu of ServiceNow you will see a “My Approvals” link.

3. From the list of security applications awaiting your approval, click on the RITM number to review the application. The Short Description column provides you with a description of the item. Note: Clicking on the “Requested” link in the State column brings up the approval/recycle/rejection page directly without 1st viewing the application.
4 Once you click on the RITM number, a copy of the application form will open for your review. Once you are done reviewing the request form, click on the back arrow in the upper left corner of the request to return to your approval menu.

5 From the approval menu, click on the “Requested” link next to the application you have just reviewed. An approval screen will open.

To approve the request click on “Approve”.

To recycle the request back to the applicant to make changes, click on “Return for Edit”. Please remember to include comments on recycled requests so that the applicant knows what roles need to be updated.

To reject the request click on “Reject”.

6 Once you click “Approve”, the application will be removed from your “My Approvals” queue, and sent to the DAF administrator for his/her review and approval.
People @ Columbia Security Application – DAF Administrator Approval Process

All PAC security requests must be approved by the DAF Administrator for the departments to which access is being requested. If you are listed as the DAF Administrator on a PAC security request, you will receive an email notification instructing you to log in to ServiceNow and approve or recycle your application. This notification is sent after the manager has approved the request.

Steps to Review and Approve a PAC Security Application

1. Log into ServiceNow using the link provided in the email.

2. In the left-hand menu of ServiceNow you will see a “My Approvals” link.

3. From the list of security applications awaiting your approval, click on the RITM number you need to review. The Short Description column provides you with a description of the item.

4. Once you click on the RITM number, a copy of the application form will open for your review. As the DAF Administrator, you have the ability to make changes to the access requested directly in the form. Once you are done reviewing and making any necessary updates to the request form, click on “Save” (available on the top right and bottom left of the form) to save your changes.

To return to the approval menu, click on the back arrow in the upper left corner of the request.
From the approval menu, click on the “Requested” link next to the application you have just reviewed. An approval screen will open.

To approve the request click on “Approve”.

To reject the request click on “Reject”.

Applications cannot be recycled back to the applicant at this stage. If a change needs to be made to the request, please edit the form prior to approval and include comments.

Once you click “Approve”, the application will be removed from your “My Approvals” queue, and sent to Central Human Resources for review and processing.