

PeopleSoft Security v9.1 – Training Agenda

Purpose: Developed specifically for PeopleSoft v9.1 Financials (FMS) functional end users, PeopleSoft Security v9.1 training quickly introduces students to the building blocks of PeopleSoft security. The goals of this class are achieved through a mixture of live PeopleSoft Security component walk-throughs and a hands-on exercise that allows students to apply security to a PeopleSoft FMS module as transactions are entered and processed.

Prerequisites: Intro to PeopleSoft v9.1 Financials Training

Section 1: Security Building Blocks

1. Course Introduction
2. Overview of PeopleSoft Security
3. Permission Lists
 - Pages used to define Permission Lists
 - General Permissions
 - Pages Permissions
 - PeopleTools Permissions, Process Permissions
 - Query Permissions, Access Groups and Query Profiles
4. Roles
 - Pages used to define Role Options
 - General Role Tab
 - Assigning Permission Lists to Roles
 - Members for a Role, Workflow Routing Options and Role Grants
5. User Profiles
 - Pages Used to Specify User Profile Attributes
 - General, User ID and Roles
 - Workflow
6. Row-Level Security
 - Business Unit
 - By User ID or Permission List
7. User Preferences
 - Overall
 - Modular
8. System-wide Options
 - Password Controls and Query Access Manager
 - Sample Process Flow for Security Requests
 - Security Strategy and Considerations
9. Review and Exercise
 - Viewing and/or Creating Roles with delivered Permission Lists
 - Assigning Roles to User Profiles

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Section 2: Security Exercise coupled with Financial Module

1. Accounts Payable: Of the core PeopleSoft Financials modules, AP is a good module to demonstrate transactions (vendor maintenance, voucher entry, payment processing) with PeopleSoft Security since AP processes contain an inherent segregation of duties that are easy to understand.
 - Hands-on exercise that walks students through some basic Security processes:
 - Review the Security Roles and User IDs developed for this class
 - User ID: SPEARMC_AP1 / Role: Accounts Payable Entry
 - User ID: SPEARMC_AP2 / Role: Accounts Payable Manager
 - Review Permissions Lists tied to each unique Role
 - Review User Preferences for each User ID
 - Add unique User ID / User Preferences
 - Copy a unique User ID / User Preferences
 - Add Role (Advanced Topic)
 - Add Permission List (Advanced Topic)
 - Walk-through a typical AP scenario using two unique PeopleSoft User ID's:
 - AP Entry (User ID: SPEARMC_AP1 / Password: AP1)
 - Enter and Save Vendors
 - AP Manager (User ID: SPEARMC_AP2 / Password: AP2)
 - Approve Vendors / Try to add Vendor
 - Explain and/or walk-through other standard AP related transactions and discuss how PeopleSoft Security controls access and views to each scenario. These may include:
 - Vendor, Voucher and Payment Maintenance
 - Voucher, Payment Posting and Journal Generator to GL
 - Using row level security to limit access to inquiry panels and PS/Query