

This user guide provides a list of Cost Center and Change Request forms and what the forms can be used to request.

There are currently 3 New Cost Center Request Forms and 4 Cost Center Change Request Forms.

This guide also provides steps on how to:

- ❖ Locate a PeopleSoft form
- ❖ Search for a PeopleSoft form
- ❖ Submit a PeopleSoft form
- ❖ Preview the approval workflow before submitting the form
- ❖ Cancel a form once submitted in to workflow.
- ❖ Approve a cost center or change request.
- ❖ Find pending forms waiting for approval.
- ❖ Add and view comments in a form.
- ❖ Know if a form has been approved or denied.

Question regarding Cost Center or Change Request forms should be directed to:

System Administration

systemadministration@utdallas.edu

Main: 972-883-2602

New cost center and cost center change request forms are located in PeopleSoft under Main Menu > Employee Self Service.



Cost Center Request Forms

1. **Cost Center Request Form (Non-Grant)** – this request can be used to request all non-sponsored project cost centers in the Fund groups specified below:
 - State Funded
 - Designated
 - Auxiliary Enterprises
 - Restricted
 - Restricted Gifts for Research
 - Plant Fund
 - Loan
 - Agency
2. **Grant Cost Center Request Form** – this request can be used to request Sponsored Project and Cost Share cost centers only. This form can only be submitted by OPM (Office of Post Award Management).
3. **Endowment Cost Center Request Form** – this request can be used to request Principal Endowment and Endowment Gift cost centers. This form can only be submitted by Development and Accounting Operations.

Cost Center Change Forms

1. **Attribute & Description Change Request** -used to request changes to descriptions and attributes (Owner, Manager, Alternate) changes for a cost center.
2. **Cost Center Change Request** -used to request chartfield value changes for non-sponsored or plant fund cost centers. Includes (fund code, department or function).
3. **Grant Cost Center Change Request** -used to request chartfield value changes for Sponsored projects and Cost share cost centers only. This request can only be submitted by OPM (Office of Post Award Management) Includes (fund code, department, function, Project or Activity).
4. **Plant Cost Center Change Request** -used to request chartfield value changes for plant funded cost centers only. This request can only be submitted by Plant Accounting. Includes (fund code, department, function, Project or Activity).

Search and Fill out a PeopleSoft Form

Navigation: Main Menu > Employee Self-Service > Forms > Search/Fill a Form

PeopleSoft provides the capability to Search for a form the requester has submitted. This can be done on the Find an Existing Values tab of the Search/Fill a Form page.

The Search Criteria can be used to assist with the search.

Favorites ▾ Main Menu ▾ > Employee Self-Service ▾ > Forms ▾ > Search/Fill a Form

Search/Fill a Form

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

▼ Search Criteria

Sequence Number: = ▾

Subject: begins with ▾

Form: begins with ▾ 🔍

Document Key String: begins with ▾

Priority: = ▾

Due Date: = ▾ 📅

Approval Status: = ▾

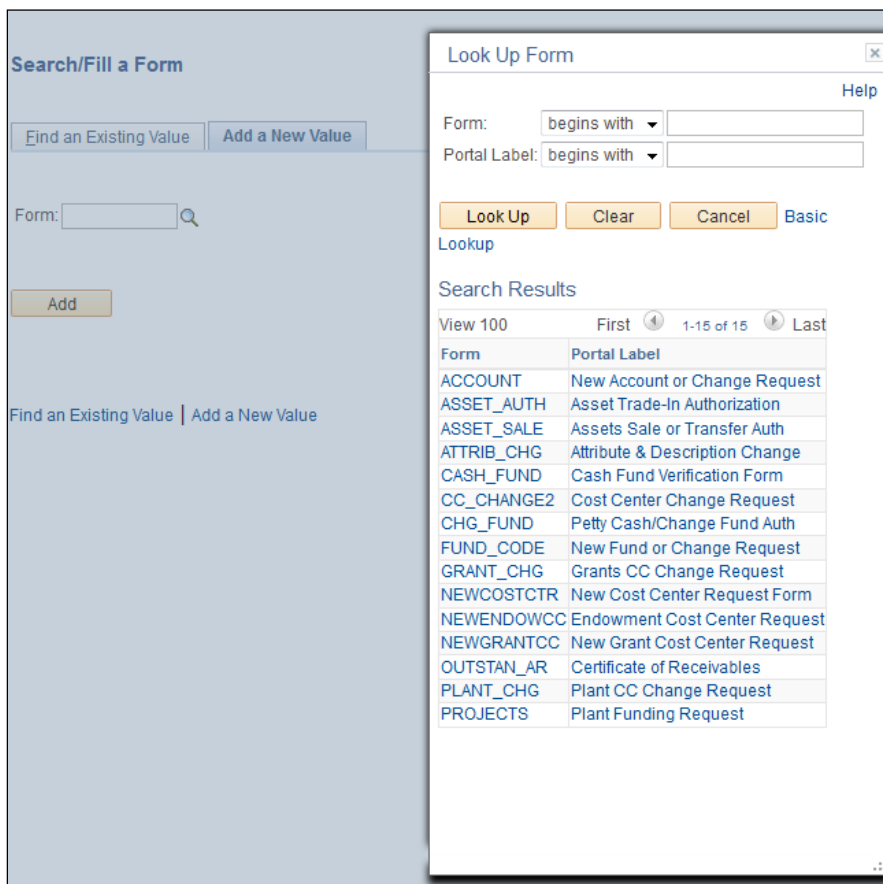
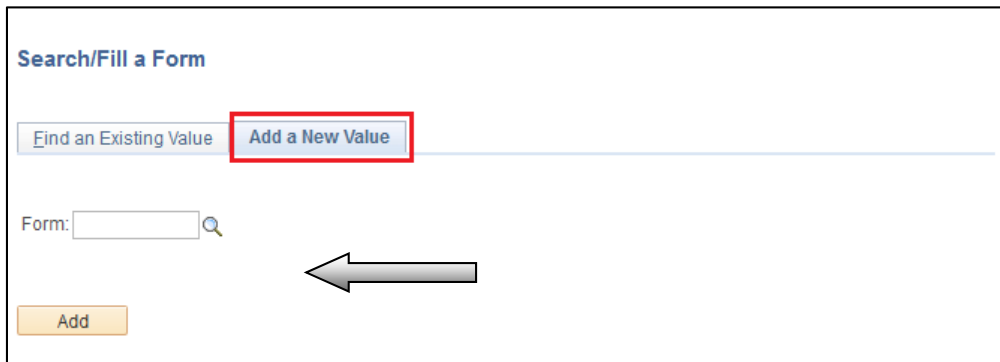
Case Sensitive

Search Clear Basic Search 🔍 Save Search Criteria

Please note: The requester and approver can ONLY view the forms he/she has created or approved.

Submit a PeopleSoft Form

1. Click on the “Add a New Value’s” tab on the Search/Fill a Form page.
2. Click on the magnifying glass to view all active forms that can be submitted.
3. Choose the form that is needed and click add.



4. The form will appear to be filled out.
5. Fill out all required (*) fields on the form, once complete, click save.
6. Attach any documentation needed on the Attachments tab if applicable.

Form
Instructions
Attachments

New Cost Center Request Form

*Subject:	<input type="text" value="Demo - Cost Center Request"/>		
Priority:	<input style="border: none; border-bottom: 1px solid black; width: 100%;" type="text" value="3-Standard"/>	Due Date:	<input style="border: none; border-bottom: 1px solid black; width: 100%;" type="text" value=""/> <small>BJ</small>
Status:	<input type="text" value="Initial"/>		
*Requester:	<input type="text" value="Stephanie Williams"/>	*Long Description:	<input type="text" value="Test"/>
*Fiscal Year:	<input type="text" value="2017"/>	*Short Description:	<input type="text" value="Test"/>
*Date of Request:	<input type="text" value="03/07/2017"/> <small>BJ</small>	*Department:	<input type="text" value="401100"/> <small>Q</small>
*Contact Number:	<input type="text" value="2637"/>	*Function:	<input type="text" value="713"/> <small>Q</small>
*Email Address:	<input type="text" value="sxw079000@utdallas.edu"/>	*Fund Group:	<input type="text" value="3000 - Designated"/>
*Owner Name:	<input type="text" value="Reda Bernoussi"/>	*Owner Netid:	<input type="text" value="rbemou-utd"/> <small>Q</small>
*Manager Name:	<input type="text" value="Reda Bernoussi"/>	*Manager Netid:	<input type="text" value="rbemou-utd"/> <small>Q</small>
*Alternate Name:	<input type="text" value="Stephanie Williams"/>	*Alternate Netid:	<input type="text" value="sxw079000-utd"/> <small>Q</small>
			<input type="checkbox"/> Retain Funding

Please provide information regarding how the cost center will be funded below. If funds will be transferred from another cost center to fund this new cost center, please provide the cost center in the space below.

Funding Source:	<input style="width: 100%;" type="text" value=""/>
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*****Plant Accounting and Office of Post Award Only*****

Project id:

Activity id:

***** Plant Accounting and Systems Administration Only*****

Fund Code: Q

Assigned Cost Center:

More Information:

Save

7. The requester will have the option to review the form and preview the workflow approval before submitting. Once reviewed click submit.
8. A sequence number will be assigned to the form. The sequence number is only specific to The requester form and can be used to check the status of the form at any time.
 - ❖ The status of the requester form can be viewed on the Search/Fill a Form screen, on the Find an Existing Value tab, shown on page 4.

Form
Instructions
Attachments

Seq #: 3483

New Cost Center Request Form

***Subject:**

Priority: **Due Date:**

Status: Initial ➔

***Requester:** ***Long Description:**

***Fiscal Year:** ***Short Description:**

***Date of Request:** ***Department:**

***Contact Number:** ***Function:**

***Email Address:** ***Fund Group:**

***Owner Name:** ***Owner Netid:**

***Manager Name:** ***Manager Netid:**

***Alternate Name:** ***Alternate Netid:**

Retain Funding

****Plant Accounting and Office of Post Award Only****

Project id:

Activity id:

**** Plant Accounting and Systems Administration Only****

Fund Code:

Assigned Cost Center:

Please provide information regarding how the cost center will be funded below. If funds will be transferred from another cost center to fund this new cost center, please provide the cost center in the space below.

Funding Source:


More Information:

- After the form is submitted, the workflow page will be displayed along with who the form will route to next. Click ok, and you are taken back to the forms page.

Note: After a form is submitted into workflow the requester will have the option to cancel the form at anytime, by hitting the Cancel Approval button.

10. After the form has completely routed through workflow, the requester will receive a confirmation by email if the form has been approved or denied.

[Form Approval] Form 75 (NEWCC_REQ) has been Approved

 peoplesoft-fitst2@shared.utsystem.edu

Sent: Fri 3/14/2014 1:38 PM

To:  Williams, Stephanie

Form 75 (NEWCC_REQ) has been approved. Details are shown below:

Subject: Restricted Gifts for Research - Test

Priority: 3

Due Date:

Requester: sxw079000-utd

Click on the URL to access the form: https://fi-test.utdallas.edu/psp/FITST/EMPLOYEE/ERP/c/MANAGE_FORM.FORM_ADD.GBL?Page=FORM&Action=U&SEQ_NBR=75

(This message was automatically generated by Form and Approval Builder on 2014-03-14 at 13.37.58.000000. Please do not reply to this email.)

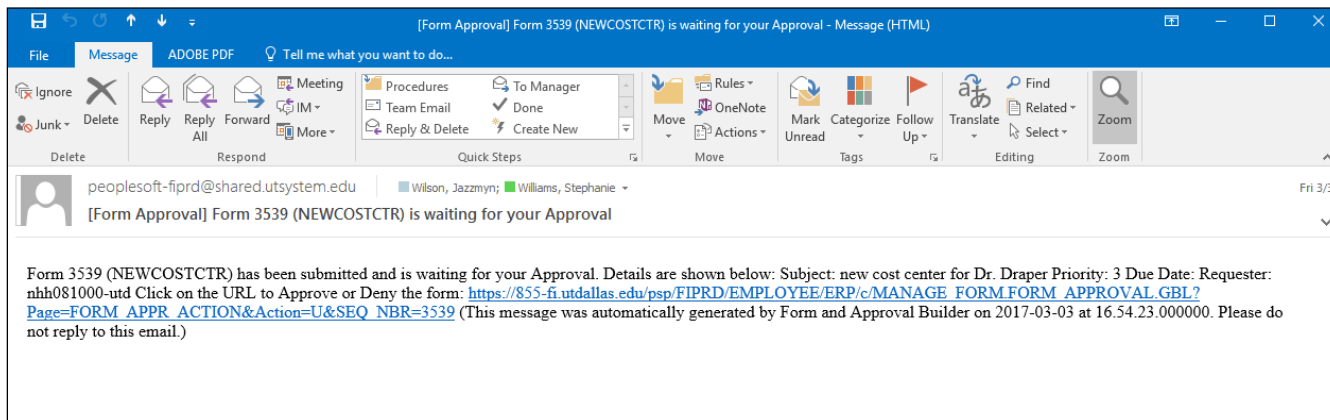
Approve a New Cost center or Change Request

The approval page of a cost center can be located in 3 ways:

1. Approval notification will be sent via email and added to the approver’s worklist.

From	Date From	Work Item	Worked By Activity	Priority	Link	Mark Worked	Reassign
Reuben Griffin	11/02/2016	Approval Routing	Approval Workflow	3-Low	FormApproval_22781 CC_CHANGE_1900-01-01_N_0 Cost Center Change Request Cost Center Function Code Chang from 401 to 101-3166	Mark Worked	Reassign
Jazzmyn Wilson	01/12/2017	Approval Routing	Approval Workflow	1-High	GL JournalApproval_393393_DAL01 2016-06-07_N_0 BUSINESS_UNITDAL01 JOURNAL_ID0000367272 JOURNAL_DATE2017-01-12 BUSINESS_UNIT_LN1DAL01 RDC:RA0A	Mark Worked	Reassign
Stephanie Williams	01/26/2017	Approval Routing	Approval Workflow	3-Low	FormApproval_23701 CC_CHANGE_2016-11-17_N_0 Cost Center Change Request AECL Service Center - 3275	Mark Worked	Reassign

2. If the approver does not want to go to their worklist, the email notification link can be used to go the form for approval.



3. The approver can navigate directly to the Approval/Review a Form page.

Navigation: Gemini Financials > Main Menu > Manager Self-Service > Approve/Review a Form

- 1. On the “Find an Existing Value” tab, the approver may search for a specific form indicated by the “Search Criteria”, or click the search button to view the Forms pending approval.**

Example: the approver may search by the Sequence number of the form or the approval status.

Approval/Review a Form

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ **Search Criteria**

Use Saved Search:

Sequence Number:

Form:

Subject:

Priority:

Due Date:

Document Key String:

Approval Status:

Case Sensitive

Search
Clear

[Basic Search](#)

[Save Search Criteria](#)

[Delete Saved Search](#)

- 2. After the criteria is entered, click the search button to return the results.**

Search Results						
View All						First 1-40 of 40 Last
Sequence Number	Portal Label	Subject	Priority	Due Date	Document Key String	Approval Status
2930	Grants CC Change Request	Move the balance of Dr. Hart's grant from CBH to BBS effective 9/1/16	3-Standard	08/31/2016	(blank)	Pending
2944	Cash Fund Verification Form	Performing Arts Change 2	3-Standard	08/15/2016	(blank)	Pending
2945	Cash Fund Verification Form	Performing Arts Change 1	3-Standard	08/15/2016	(blank)	Pending
3153	Cost Center Change	New Cost Center(s) to replace old cost centers, in newly created department 201030	1-Critical	10/11/2016	(blank)	Pending
3166	Cost Center Change	Cost Center Function Code Chang from 401 to 101	3-Standard	10/19/2016	(blank)	Pending
3263	New Cost Center Request Form	New Rest Gift for Research CC - Aging Mind Foundation Post-Doctoral Fellowship	3-Standard	(blank)	(blank)	Pending
3275	Cost Center Change	AECL Service Center	3-Standard	12/01/2016	(blank)	Pending
3393	Endowment Cost Center Request	Young Professionals in Energy - Dallas Opp Fund	3-Standard	01/24/2017	(blank)	Pending

- After the form is selected from the criteria returned, the approver is taken to the Approval/Workflow page.

The screenshot displays the 'New Cost Center Request Form' interface. At the top, it shows the sequence number '3426' and the subject 'new su'. Below this is a 'Go to Form' button. The main section is titled 'Approval Action' and contains a 'Comment' text area with 'Approve', 'Deny', and 'Save Comment' buttons. Below that is a 'Review/Edit Approvers' section showing a workflow diagram for 'New Cost Center Request Form: 3426:Pending'. The workflow consists of several steps: a 'Skipped' step by Paul E. Dobson, an 'Approved' step by Jazmyn Wilson, a 'Reviewer' step by Joshua Weatherly, another 'Reviewer' step by Heather Burge, an 'Approved' step by David Gaarder, a 'Skipped' step with the message 'No approvers found', and a final 'Approved' step by Jazmyn Wilson and Stephanie Williams. A 'Comments' section is visible at the bottom.

This is a close-up view of the 'New Cost Center Request Form' page. The 'Seq #' is 3426 and the 'Subject' is 'new su'. The 'Go to Form' button is highlighted with a red rectangular box. Below it is the 'Approval Action' section, which includes a 'Comment' text area and three buttons: 'Approve', 'Deny', and 'Save Comment'. A red arrow points to the 'Approve' button.

- ❖ In order to view the form, click on the "Go to Form" button at the top left corner of the page.
- ❖ The Approval actions box is used to Approve, Deny or Add comments to the form.
(Note: You must approve or deny before the form will move to the next approver)

❖ Click on the Comments arrow to view any comments entered by previous approvers

Review/Edit Approvers

New Cost Center Request Form

▼ **New Cost Center Request Form: 3426:Pending**

New Cost Center Request Form

Skipped
Paul E. Dobson
UTD Form CCRReq Fiscal Off Appr
01/25/17 - 3:11 PM

Approved
Jazzmyn Wilson
UTD Financials Administrator
01/26/17 - 3:38 PM

Approved
Joshua Weatherly
UTD Form CCRReq Dept Approver
01/26/17 - 4:41 PM

Reviewer
Joshua Weatherly
Reviewer

Reviewer
Heather Burge
Reviewer

Approved
David Gaarder
UTD Form CCRReq Fund Approver
01/27/17 - 7:55 AM

▶ **Comments**

Review/Edit Approvers

New Cost Center Request Form

▼ **New Cost Center Request Form: 3426:Pending**

New Cost Center Request Form

Skipped
Paul E. Dobson
UTD Form CCRReq Fiscal Off Appr
01/25/17 - 3:11 PM

Approved
Jazzmyn Wilson
UTD Financials Administrator
01/26/17 - 3:38 PM

Approved
Joshua Weatherly
UTD Form CCRReq Dept Approver
01/26/17 - 4:41 PM

Reviewer
Joshua Weatherly
Reviewer

Reviewer
Heather Burge
Reviewer

Approved
David Gaarder
UTD Form CCRReq Fund Approver
01/27/17 - 7:55 AM

▼ **Comments**

System at 01/25/17 - 3:11 PM
Requester (pdobson-utd) is approver on step number 1, path 1, stage 10, which has self-approval disabled! (18081,1031)

4. Once the form has been approved or denied, the requester of the form is sent an email confirmation.

[Form Approval] Form 3551 (NEWENDOWCC) has been Denied - Message (HTML)

peoplesoft-fiprd@shared.utsystem.edu Williams, Stephanie 8:33 AM

[Form Approval] Form 3551 (NEWENDOWCC) has been Denied

Form 3551 (NEWENDOWCC) has been denied. Details are shown below: Subject: Cecil H. and Ida Green Endowed Scholarship (Quasi) Priority: 1 Due Date: 2017-03-02 Requester: sxw079000-utd Click on the URL to access the form: https://855-fi.utdallas.edu/psp/FIPRD/EMPLOYEE/ERP/c/MANAGE_FORM_FORM_ADD_GBL?Page=FORM&Action=U&SEQ_NBR=3551 (This message was automatically generated by Form and Approval Builder on 2017-03-08 at 08:33:07.000000. Please do not reply to this email.)