**Last Updated**: 01/04/2021

This QRG outlines the steps to request to add or remove business roles on a position.

* Role requests are initiated by the employee’s supervisor or business office. An employee cannot request roles for themselves.
* Student system (i.e. Banner, Slate, etc.) roles are not requested through IDM. Student systems role request are available online at <https://www.purdue.edu/em/esarolerequest/>.
* The requestor must be on a VPN to connect to the SuccessFactors Employee Launchpad. For help setting up a VPN contact the ITAP Customer Service Center (West Lafayette Campus), Information Services (PNW Campus), or Technology Services (PFW Campus).
* A position number is needed when completing the request. Position numbers are included in the employee’s profile or the Position Org Chart under My Company Info. Position training resources are located [online](https://sharepoint.purdue.edu/sites/treasurer/bpr/training/SitePages/poschTR.aspx?_ga=2.67115666.281203942.1573479703-239083295.1530201546).

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| Access Role Request via SuccessFactors | |
| From the **OneCampus** portal (<https://one.purdue.edu/>), launch **Employee Launchpad – SuccessFactors**.  Log in using Career Account and Password |  |
| Under **Organizational Updates - Additional Actions** on the SuccessFactors Home screen, click the **Role Request Information and request form** tile. Role Request window opens with a link to review privileges as well as the link to the form. | |
| The request is displayed.   1. Click **Select**, next to **Position** to search for employee’s position. 2. Enter position number in the **Find** text entry   *When searching, use the asterisk (\*) before and after the term to perform a more accurate search.*   1. Click **Search** |  |
| Click to select the desired position and click **Add**. |  |
| Select **Add Role** (or Remove Role, when applicable) from the **Add or Remove** drop-down menu under **Additional Requests Details**.  If restricting access to the role for a specific period of time, or delaying access to the role, enter **Valid From** and **To** dates.  NOTE: The dates will apply to all roles on the request, so if one role should be limited, it should be requested separately. |  |
| A **Reason for Request** should include:   * Name of the holder of the Position if applicable. * Department * If the position is grouped, note that here |  |
| Locate business role by entering all or a portion of the business role display name in the search information in the **Find** text entry field.  *When searching, use the asterisk (\*) before and after the term to perform a more accurate search.*  Click **Search**.  *Business roles are listed* [*online*](https://www.purdue.edu/hr/mgrres/sucfactors/sapmgmtIDM.php) *and available through the Roles and Privileges Information tile next to the Role Request Form tile. The website/tile contains* [*the IDM Business Role list*](https://www.purdue.edu/hr/mgrres/supportingDocs/IDMBusinessRoleList.xlsx)*.* |  |
| 1. Click to select desired role from search results within the **Available table**. 2. Click **Add** to move to **Assigned table**. 3. Click **Submit for Approval**.   C:\Users\davis208\AppData\Local\Temp\1\SNAGHTMLc486ba.PNG | |
| A message appears confirming the **Child Role Assignment Request** was **Submitted**. |  |
| Approval Workflow | |
| **1st Level Approval** | Individual responsible for approving the requested role. Varies based on role**. If not approved within 5 days the request escalates to Compliance Approval.** |
| **Compliance Approval** | Approval from Security after a check of separation of duties. |
| Who to Contact | |
| **HR/Payroll role questions** – Contact [hroperhelp@purdue.edu](mailto:hroperhelp@purdue.edu) when needing assistance identifying what HR/Payroll roles are needed  * **Finance role questions** - Contact [cmdt@purdue.edu](mailto:cmdt@purdue.edu) when needing assistance identifying what Finance roles are needed * **Pending Requests/IDM Application** – Contact [OnePurdueSecruity@purdue.edu](mailto:OnePurdueSecruity@purdue.edu) with questions related to a current or outstanding role request and questions related to the IDM application | |
| Email Notifications | |
| If approved, the requester receives an email that the selected role has been added to the selected position. |  |
| If denied, the requester receives an email that the selected role was denied |  |