SCCOE QSS Security Access Request Form Guidelines
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Overview

The SCCOE Security Access Request Form is used by the Santa Clara and San Benito County districts to formally designate access privileges to the QSS data for each user in the respective district.

The form must be signature-approved by the registered “authorized signers” of the district before any action will be taken on the user’s profile.

The QSS Security Access Request Form is found in AccessPoint (http://accesspoint.sccoe.org) in the FORMS section. It is a PDF form and can be filled out while still online or saved to a local drive. The completed form can be saved and printed. Once filled in, 1) print the form, 2) obtain the signature of an “authorized signer”, 3) scan the form, and 4) attach it to an email to the TSB Help Desk (helpdesk@sccoe.org). It is suggested that the department retain a copy of the form for future reference as to their staff’s QSS security access and database privileges.

You will know that the email and form has been received and is being processed when you receive an AccessPoint Service Request acknowledgment email. Generally, the form will be processed in 24-48 hours, confirmed again by an AccessPoint Service Request confirmation email. Note: new users will then need to contact the Help Desk to receive their password via secure email.

To assist those filling out the access privileges, the form is laid out by module and typical district business user roles and functions –Financial, Business Management, and Human Resources. The guidelines herein show the QSS/QCC menu items to which the user will have access when certain options are selected on the QSS Security Access Request Form.

Select the access options with care. The QSS modules have several different implementation options. This form may have modules or options of modules that are not implemented for your district. It is important that you refer to your district authorized signers for policy and procedures specific to your district. To indicate exceptions to a checked option, use the COMMENTS section at the bottom.

NOTE: the screen shots displayed in this document were taken in QSS v136.4
**User Information Area**

**User Information Section** – *(Yellow box)*

<table>
<thead>
<tr>
<th>ACTION DESIRED:</th>
<th>NEW USER</th>
<th>APPEND to existing security profile</th>
<th>REPLACE existing security profile</th>
</tr>
</thead>
<tbody>
<tr>
<td>LAST NAME</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FIRST NAME</td>
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<tr>
<td>EMAIL</td>
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<td></td>
</tr>
<tr>
<td>EMPLOYEE ID</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Select District**

**District**

**Dept**

**Position**

**Phone**

**Action Desired:**

- **New User** - Create an account for a **brand new** user in this district.
- **Append** - Add additional access to an **existing** QSS account.
- **Replace** - Clear the current QSS account access for this user and **replace** it with the requested access on this form.

(Note: to remove ANY previously approved access from a user profile, you must REPLACE...stating the new full access privileges. Referring to your file copy of the user’s QSS Security Access Form will be helpful here.)

**Employee info:**

- **Last name**: Legal last name as it appears in the district’s Payroll records.
- **First Name**: Legal first name as it appears in the district’s Payroll records.
- **MI**: Middle initial. *(Optional)*
- **Email**: The district email address for the employee, not a personal email address. The QSS password information will be securely sent to this address.
- **Employee ID**: The district-assigned employee reference number. *(Optional)*
- **District**: Select the district from the drop down list.
- **Dept**: The department name in which the user works.
- **Position**: The user’s position or title.
- **Phone**: The user’s business phone number, with extension, if applicable.
FINANCIAL FUNCTIONS

The Financial Functions area in the green area of the security form addresses any areas that are associated with Budget, Finance, and Purchasing.

INQUIRY-ONLY Access

**Inquiry Only** is a base level of authority that provides READ access to all areas of the system without sensitive data such as personnel and other areas where social security numbers and similar information may be stored.

This level of access **may not** create transactions or change data in the system.

By default, this is the minimum access provided to a user. All other choices below this area are in addition to this level of access.

*Note: This access level does include the ability to run and print reports with non-sensitive financial data.*

✓ Check this box if the user **only** needs READ access to the system to view non-sensitive financial information and run financial reports.
GENERAL LEDGER (green box)
This area is associated with accounting functions. The choices made will be in addition to the baseline access of Inquiry Only, as discussed above.

Accounts Payable

Accounts Payable ENTRY provides access to the Accounts Payable area and batch maintenance up to release for payment.

Accounts Payable APPROVAL provides the authority to release batches for approval.

Important note: Due to audit standards, this level of access will not have access to vendor maintenance nor the ability to enter accounts payable payments.
Financial Functions

Cash Deposit (DC)
Cash Transfer (CT)
Journal Entry (JE)

The Cash Deposit, Cash Transfer and Journal ENTRY boxes provide access to this entry screen for the associated transactions.

The Cash Deposit, Cash Transfer and Journal APPROVAL boxes provide access to this entry screen provide access to this approval screen for the associated transaction.
Payroll Transfer (PT)

Payroll Transfer ENTRY provides access all features of the Payroll Transfer job menu except the approval.

Payroll Transfer APPROVAL provides access to the approval selection on the Payroll Transfer interface.
Financial Functions

**BUDGET TRANSFER**

Budget Transfer **ENTRY** provides access to the entry features for the Budget Transfer tab on the Budget Maintenance form.

Budget Transfer **APPROVAL** provides access to the approval functions.

**BUDGET DEVELOPMENT**

Budget Development **ENTRY** provides access to the Budget Development Functions.
Budget Development **APPROVAL** provides access to transfer from Budget Development to General Ledger.

### FIXED ASSETS

Fixed Assets Inventory **ENTRY** provides access to view an existing fixed asset or enter a new one.

Fixed Assets **MANAGER** (the right box) provides access to the Fixed Assets master file, the ability to run mass update jobs and access for entry and lookup.
Two Types of Purchasing:

Remote Purchasing – This type of purchasing is where requisitions are initiated by personnel outside of the central purchasing office (remote clerks). Remote requisitions are then reviewed by a remote administrator (such as a principal) and signed off to the central purchasing department.

PO Routing – Also called PO Hierarchy (POH) system. PO Hierarchy refers to a semi-automated requisition routing/approval system that moves a user-originated requisition through a pre-defined set of on-line approvals.

Current PO Hierarchy Districts are:
Santa Clara Districts – Fremont UHSD, Gilroy, Moreland, Morgan Hill, Oak Grove, Union & SCCOE
San Benito District - Hollister

Remote Purchasing ENTRY: Add, change, delete or inspect requisitions for their own site.

Remote Purchasing APPROVAL: Can cancel, return to originator, hold for review or sign-off to Purchasing the requisition.

Remote Purchasing “PURCHASING DEPARTMENT”: Provides access to all central purchasing support tasks. This may include but not limited to assigning purchase order numbers to requisitions, approving, printing and distributing purchase orders.

For more information on any of these options, refer to the QSS Accounts Payable and Purchasing Manual.
Financial Functions

PO ROUTING

PO Routing **ENTRY**: Add, change, delete or inspect requisitions. Can approve requisitions on their own queue. *For more information on this role, please see the QSS Accounts Payable and Purchasing Manual.*

PO Routing **PURCHASING DEPARTMENT**: Provides access to all central purchasing support tasks. Has more than one role such as remote entry, remote administrator and central purchasing role. Has access to Purchasing Master Files.

Purchase Order Change Order Management

When this option is chosen you will have access to areas for the central purchasing function.
INVOICE & BILLING MANAGEMENT
(formerly called CSAR)

Invoice Entry/Print: Ability to add, change, inspect on the “Invoice Entry” tab and print invoices on the “Invoice Print” tab.

Receipt Entry/ Cash Deposit: Ability to add, change, inspect on the “Receipt Entry” tab; receipts approval on “Receipts Rpt/App” tab; and print deposit letter and print tax reports on the “Dep Lt/Sales Tax” tab.
STORES

Stores Entry: Ability to add, inspect, cancel, extend & delete stores issues.

Stores Fill Orders: Ability to add, inspect, modify, extend, cancel, backorder and delete stores orders (SOUPDT); add, inspect, delete stores receipts (SRUPDT); add, inspect stores adjustments; and transfer and create new stock item (SKTRFRS).
Stores PO Receiving: Access to PO Receiving
BUSINESS MANAGEMENT FUNCTIONS (the blue box)

The Business Management Functions area in the blue area of the security form address system settings controlled by the district.

Account Maintenance: Provides read and write access to the Account Maintenance window.  

Additional information on how to use this window can be found in the Core Financial Manual, Appendix E: Account Maintenance, pg. 953 in QCC under Help/Documentation, Links and Feedback.
**Business Management Functions**

**Budget Blocking:** Provides read and write access to the Acct Summ/Bdgt Blck tab in the Budget Maintenance window.

*Additional information on how to use this window can be found in the Core Financial Manual, Chapter 5- Budget Maintenance Window, pg. 211 in QCC under Help/Documentation, Links and Feedback.*

**Chart of Accounts:** Provides read and write access to the Acct Summ/Bdgt Blck tab in the Budget Maintenance window.

*Additional information on how to use this window can be found in the Core Financial Manual, Chapter 5- Budget Maintenance Window, pg. 211 in QCC under Help/Documentation, Links and Feedback.*
**Indirect Cost:** Provides read and write access to the Indirect Costs Tab in the Budget Maintenance window.

*Additional information on how to use this window can be found in the Core Financial Manual, Chapter 5- Budget Maintenance Window, pg. 203 in QCC under Help/Documentation, Links and Feedback.*

**Upload/Download Files (QSSXFR):** Provides ability to export budget data from Budget Development for the State SACS software.

*Additional information on how to use this feature can be found in the Introducing QCC Budget Development Manual, Chapter 9- Exporting Budget Data to SACS pg 61. on Access Point under Trainings Materials/Budget.*
Master Files:

**Fixed Assets**: Provides read and write access to the Fixed Assets Master files screens.

*Additional information on how to use these screens can be found in the Fixed Assets Manual, Chapter 3- Setup Master Files, pg. 58 in QCC under Help/Documentation, Links and Feedback.*

**Invoice & Billing Mgmt**: Provides read and write access to the Invoice and Billing Management Master File screen.

*Additional information on how to use this screen can be found in the Invoicing/Billing Management Manual, Chapter 4- Master Files, pg 32. in QCC under Help/Documentation, Links and Feedback.*
Stores: Provides read and write access to the Stores (Warehouse) Master File Maintenance Screens.

Additional information on how to use these screens can be found in the Stores Manual, Chapter x, pg. xx in QCC under Help/Documentation, Links and Feedback.

Vendor: Provides read and write access to the Vendor Maintenance screen.

Additional information on how to use this screen can be found in the Accounts Payable (Vendors) Manual, pg 8. in QCC under Help/Documentation, Links and Feedback.
DEFAULT PRINTER

Enter your district’s QSS default printer ID, if known.

The standard formatting for this printer (configured for each district by SCCOE Technology Services) is: the letter **P**, followed by the 2-digit county number (43 or 35), the 2-digit district number, the letter **D**, then the district designated printer number. (i.e. P4307D1 P4390D22)

Sometimes this printer is referred to by the “QSS Router Printer”, because print jobs are sent via the Route icon. This printer will not necessarily be your local default Windows printer.
HUMAN RESOURCES FUNCTIONS (purple box)

The Human Resources Functions area in the purple area of the security form addresses areas that are associated with Payroll and Personnel.

Employee Maintenance Menu:
Personnel

Provides **Read Only** or **Read & Write** access to the HR screens, depending on which radio button you select. You can also select Personnel **Manager** which gives you addition menu options.

The menu items that become available to you may appear within the Personnel, Professional, Position Control, or Payroll headers. Here is a list of the various screens that a Read-Only or a Read & Write user will have access to:

- Demographic (MA)
- Termination (TE)
- Comments (CO)
- Client Defined (CL)
- Employment Verification (VE)
- Applications (AP)
- Action Log (AL)
- Action Log History (AH)
- Search Action Log History
- CA-CTC Credentials (CR)
- CA-CTC Credentials View
- Credentials (SK*)
- Service Yrs/Units (SK*)
- Degrees (SK*)
- Skills (SK*)
- Inservice (SK*)
- Educational Units (EU)
- Evaluations (EV*)
- Test Results (EV*)
- Teaching History (TS*)
- Teaching Preferences (TS*)
- Assignments/ENH (EA)
- Assignment Info (EC)
- Job History (JH)
- PAT - Other Assignments
- PAT - Related Data
- Seniority Inspection (SI)
- W4/Control Data (W4)
**Payroll**

This access gives you either **Read Only** or **Read & Write** access to the Payroll screens, depending on which radio button you select. By selecting the Payroll **Manager**, you will have additional menu options.

The menu items that become available to you may appear within the Personnel, Professional, Position Control, or Payroll headers. Here is a list of the various screens that a Read-Only or a Read & Write user will have access to:

- Comments (CO)
- Payroll History
- Pay Lines (PR)
- Time Card Entry (TC)
- W4/Control Data (W4)
- Direct Deposit

**Note – Access EC has been added to the Payroll role**

**Benefit Management**

This access gives you either **Read Only** or **Read & Write** access to the Benefit Management screens, depending on which radio button you select.

The menu items that become available to you may appear within the Personnel, Professional, Position Control, or Payroll headers. Here is a list of the various screens that a Read-Only or a Read & Write user will have access to:

- Deductions (PD)
- Benefits Management (BM)
- Emergency (ME*)
- Immunizations (ME*)
- Handicaps (ME*)
- Medical (ME*)
**Human Resources Functions**

**Absence Tracking:**

This access gives you either Read Only or Read & Write access to the Absence Tracking screens, depending on which radio button you select.

**MASTER FILES**

Provides Read & Write access to the Master files, depending on which application is checked. You can select more than one, depending on the module (Personnel/Payroll, Benefits Management, or Absence Tracking) to which you need access. All the Master files are on either HR Code Maintenance or HR Code Maintenance #2, depending on the master file.