

Job Aid PC1
KSU Connect Access and P-Card/Works Request

How To: Request access to KSU Connect and the module supporting KSU's Purchasing Card Program and requesting access to Works and/or a P-Card.

Purpose: To assist Users in gaining access to KSU Connect, which houses a majority of the modules associated with the Purchasing Card (P-Card) Program. This access has to be established before any program-specific requests can be submitted; including new Cardholders and access to the Works system as an Approving Official or Fiscal Approver. *(KSU Connect is not strictly for the P-Card Program, so additional access can be requested on the same form as approved by a Department/College for other reasons. This job aid is strictly referring to the P-Card Program module.)*

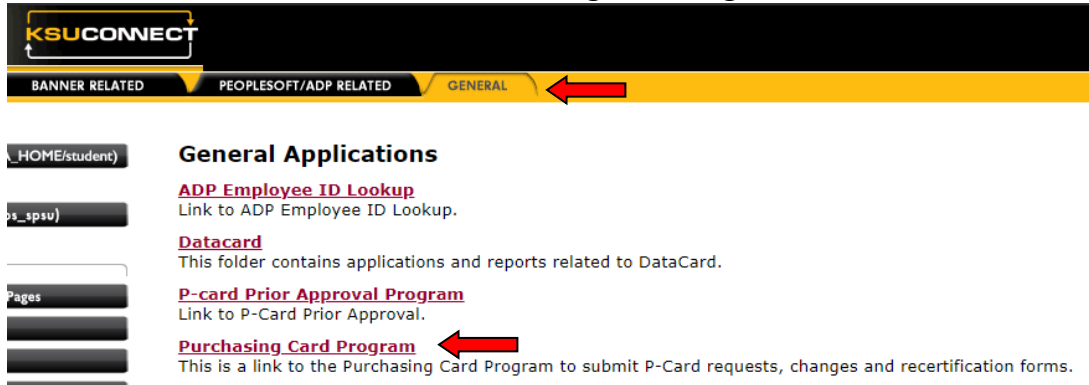
To assist Users in submitting a Request & Change Form in the Purchasing Card Program module that is housed in KSU Connect. This request would allow Users to submit for Works access or to request a P-Card based on roles assigned.

If the User has existing access to KSU Connect, skip to #6.

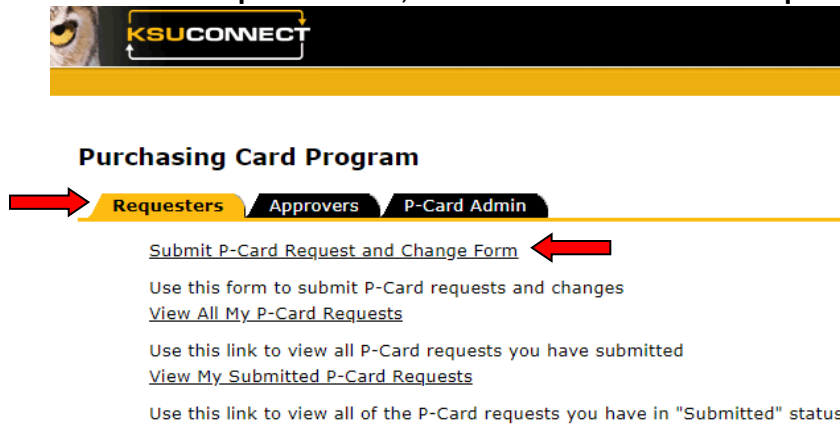
1. The initial request for KSU Connect access should be completed by the End-User's Supervisor or Department Administrator.
2. Navigate to '**Support**' of University Information Technology Services' (UITS) webpage at <https://uits.kennesaw.edu/support/forms.php>.
3. Select '**Technology Service Requests**'.
4. Select ServiceNow:
 - Select Application Access Request
 - Under Request Type, select Addition
 - Select End-User's **campus location** (*Kennesaw or Marietta*)
 - Under Application select KSU Connect
 - Enter the name of the End-User that needs access
 - Click '**Submit**'
5. Once access is established, UITS will send a confirmation email the End-User.
6. If the End-User already has access to KSU Connect, but not the Purchasing Card Program, the End-User can send an email to service@kennesaw.edu requesting the Purchasing Card

Program links be added to his/her existing KSU Connect set-up.

7. Once access is set, log in to KSU Connect at <https://kennesaw.edu/ksuconnect>.
8. Select the 'General' tab; then the 'Purchasing Card Program' link:



9. Select the 'Requesters' tab; then the 'Submit P-Card Request and Change Form' link:



10. The data in the **Employee Information** section at the top of the form will pre-populate based on the KSU Connect log-in information. Data will need to be entered into any fields that are blank. *(Fields marked with an asterisk (*) indicate information that is required to complete the process.)*
11. Enter the **ChartString** information desired as the Cardholder's default in Works.
12. The data in the **Supervisor Information** section will pre-populate based on the KSU Connect log-in information. Data will need to be entered into any fields that are blank.
13. In the **Access** section, select the appropriate option depending on the role assigned:
 - New Cardholder
 - New Works Access Only *(Approving Officials & Fiscal Approvers roles)*
14. In the **Required Approvals and Dates** section, enter your initials in the required field.
15. Confirm that the pre-populated Supervisor, Department Head, and Business Manager are

correct. (The Department Head will be in the role of Approving Official and the Business Manager will be in the role of Fiscal Approver.)

16. Click **'Sign & Submit'**. Submission of the form will trigger the required approval workflow.

The screenshot shows a web form titled "Required Approvals and Dates". A red arrow points down to the "Employee Name" field, which contains "Carolyn Bohannon". Another red arrow points left to the "Business Manager Approver" field, which contains "None". A third red arrow points up to the "Sign & Submit" button at the bottom of the form. Below the form is a confirmation statement: "By clicking 'Sign & Submit' I confirm that I am the employee indicated on this request and that I have read and will abide by the Kennesaw State University Purchasing Card (P-Card) Program policies and procedures." At the bottom of the form are two buttons: "Sign & Submit" (yellow) and "Cancel" (maroon).

Required Approvals and Dates

Note: All (*) fields are required. For signatures, please enter initials.

* Submission Date: [07/15/2019] * Employee Name: [Carolyn Bohannon] * Employee Initials: []

Supervisor Approver: [] Department Head Approver: [] Business Manager Approver: [None]

By clicking "Sign & Submit" I confirm that I am the employee indicated on this request and that I have read and will abide by the Kennesaw State University Purchasing Card (P-Card) Program policies and procedures.

Sign & Submit Cancel