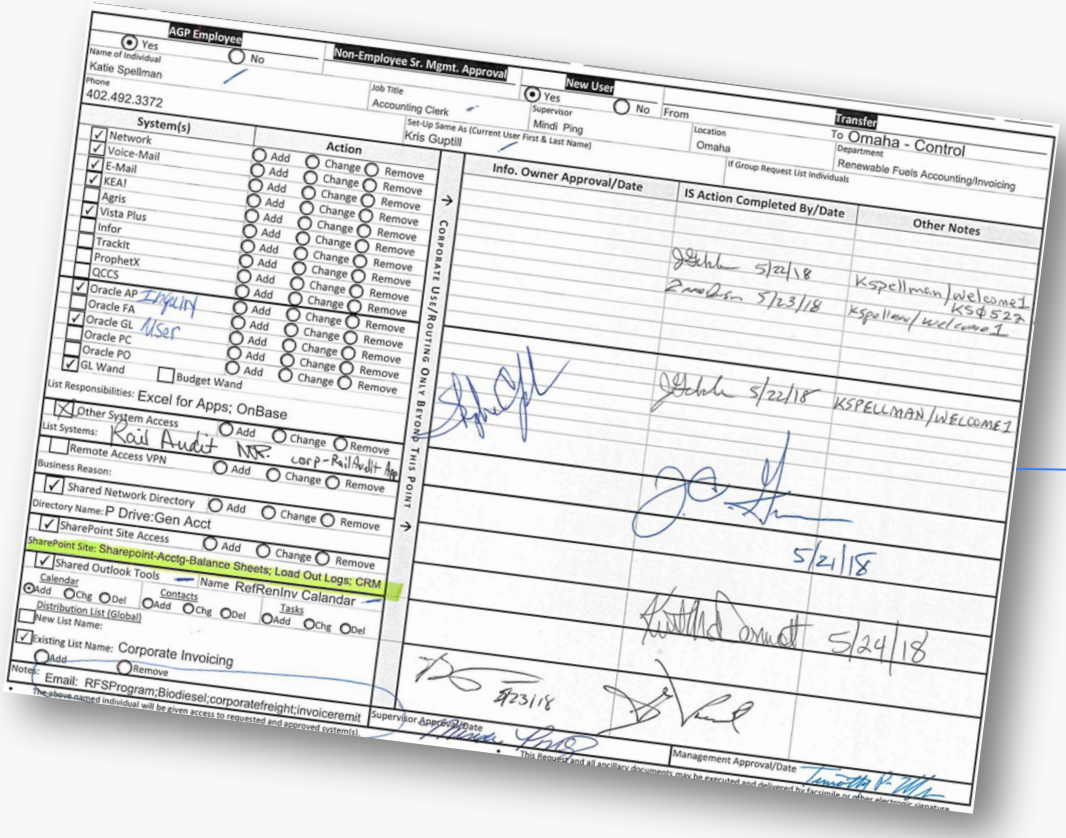
Chris Pellman
Manager Process Optimization
AGP
Ag Processing Inc

Problem

1. Managing user identity is a challenge for requesters, approvers, and set-up
2. No Central System of Record


AGP Employee
Yes
No
Name of Individual
Katie Spellman
Phone
402.492.3372
Non-Employee Sr. Mgmt. Approval
Job Title
Accounting Clerk
Set-Up Same As (Current User First & Last Name)
Kris Guptill
New User
Yes
No
Supervisor
Mindi Ping
From
Location
Omaha
Transfer
To Omaha - Control
Department
Renewable Fuels Accounting/Invoicing
If Group Request List Individuals
System(s)
Action
Network
Voice-Mail
E-Mail
KEA!
Agris
Vista Plus
Infor
Trackit
ProphetX
QCCS
Oracle AP
Oracle FA
Oracle GL
Oracle PC
Oracle PO
GL Wand
Budget Wand
Add
Change
Remove
List Responsibilities: Excel for Apps; OnBase
Other System Access
List Systems: Rail Audit
Remote Access VPN
Business Reason:
Shared Network Directory
Directory Name: P Drive:Gen Acct
SharePoint Site Access
SharePoint Site: Sharepoint-Acctg-Balance Sheets; Load Out Logs; CRM
Shared Outlook Tools
Calendar
Name RefRenInv Calandar
Contacts
Tasks
Distribution List (Global)
New List Name:
Existing List Name: Corporate Invoicing
Notes:
Email: RFSProgram;Biodiesel;corporatefreight;invoiceremit
The above named individual will be given access to requested and approved system(s).
CORPORATE USE/ROUTING ONLY BEYOND THIS POINT
Info. Owner Approval/Date
IS Action Completed By/Date
Other Notes
5/22/18
KSpellman/Welcome1
5/23/18
KSpellman/Welcome1
5/22/18
KSPELLMAN/WELCOME1
5/21/18
5/24/18
5/23/18
Supervisor Approval/Date
Management Approval/Date
This Request and all ancillary documents may be executed and delivered by facsimile or other electronic signature.

Paper Form

Objectives

Proactive process

TARGET/OBJECTIVE # 1

- Human Resources
- Manager Action

Eliminate confusion

TARGET/OBJECTIVE # 2

- Role-Based Templates
- Relatable Terminology

Historical record with trackability

TARGET/OBJECTIVE # 3

- Moves, Adds, Changes
- Who, When

Solution

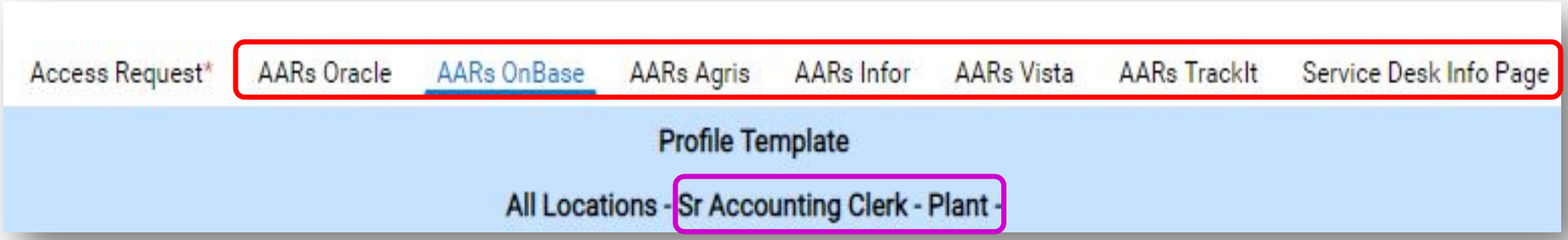
Human Resource Feed

- Hires
- Transfers
- Terminations

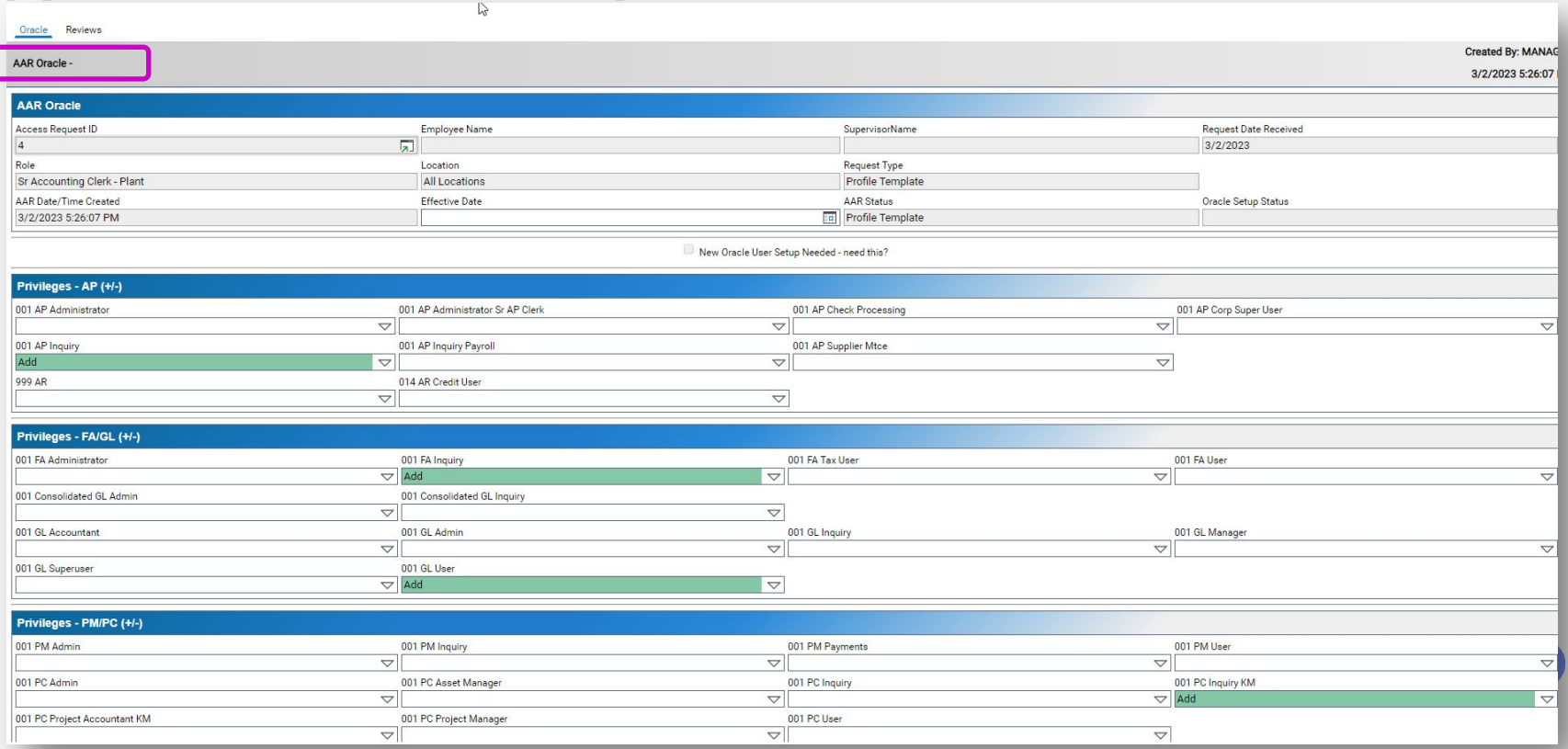
Proactive

- Manager – Action Item
- Termination – Action Item

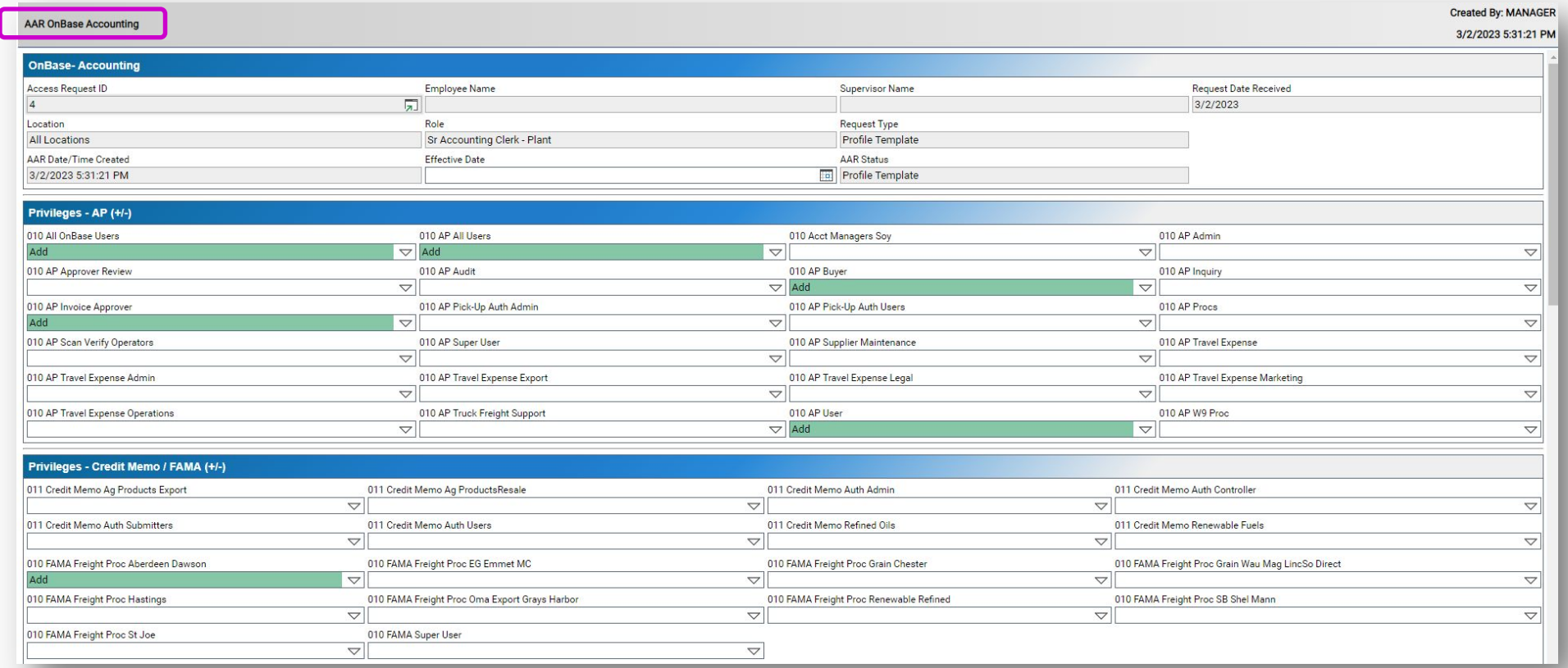
Role-Based Templates



Application Access Request



Application Access Request



AAR OnBase Accounting

Created By: MANAGER
3/2/2023 5:31:21 PM

OnBase- Accounting

Access Request ID	Employee Name	Supervisor Name	Request Date Received
4			3/2/2023

Location	Role	Request Type
All Locations	Sr Accounting Clerk - Plant	Profile Template

AAR Date/Time Created	Effective Date	AAR Status
3/2/2023 5:31:21 PM		Profile Template

Privileges - AP (+/-)

010 All OnBase Users	010 AP All Users	010 Acct Managers Soy	010 AP Admin
Add	Add		

010 AP Approver Review	010 AP Audit	010 AP Buyer	010 AP Inquiry
		Add	

010 AP Invoice Approver	010 AP Pick-Up Auth Admin	010 AP Pick-Up Auth Users	010 AP Procs
Add			

010 AP Scan Verify Operators	010 AP Super User	010 AP Supplier Maintenance	010 AP Travel Expense

010 AP Travel Expense Admin	010 AP Travel Expense Export	010 AP Travel Expense Legal	010 AP Travel Expense Marketing

010 AP Travel Expense Operations	010 AP Truck Freight Support	010 AP User	010 AP W9 Proc
		Add	

Privileges - Credit Memo / FAMA (+/-)

011 Credit Memo Ag Products Export	011 Credit Memo Ag ProductsResale	011 Credit Memo Auth Admin	011 Credit Memo Auth Controller

011 Credit Memo Auth Submitters	011 Credit Memo Auth Users	011 Credit Memo Refined Oils	011 Credit Memo Renewable Fuels

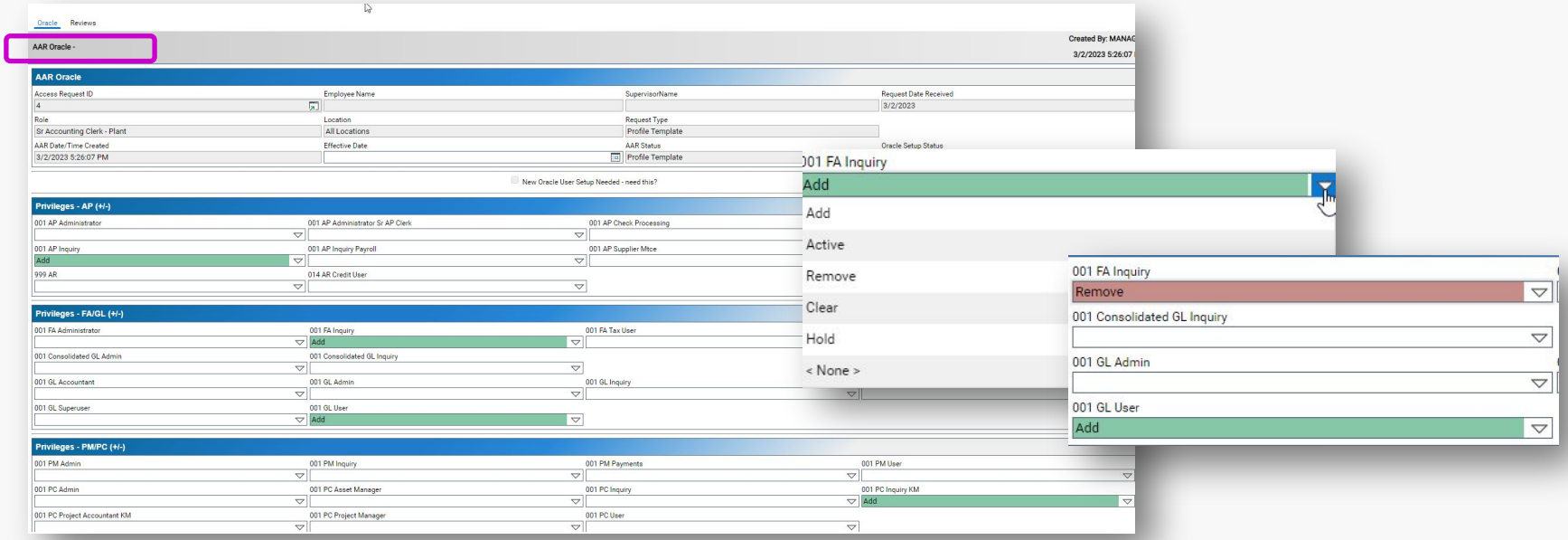
010 FAMA Freight Proc Aberdeen Dawson	010 FAMA Freight Proc EG Emmet MC	010 FAMA Freight Proc Grain Chester	010 FAMA Freight Proc Grain Wau Mag LincSo Direct
Add			

010 FAMA Freight Proc Hastings	010 FAMA Freight Proc Oma Export Grays Harbor	010 FAMA Freight Proc Renewable Refined	010 FAMA Freight Proc SB Shel Mann

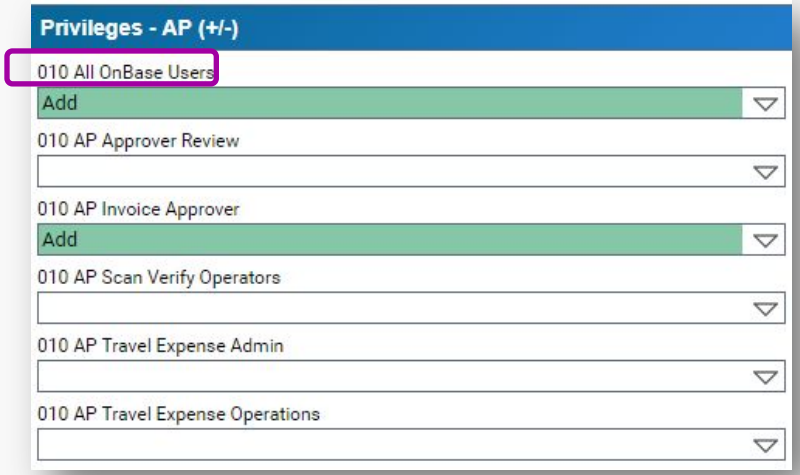
010 FAMA Freight Proc St Joe	010 FAMA Super User

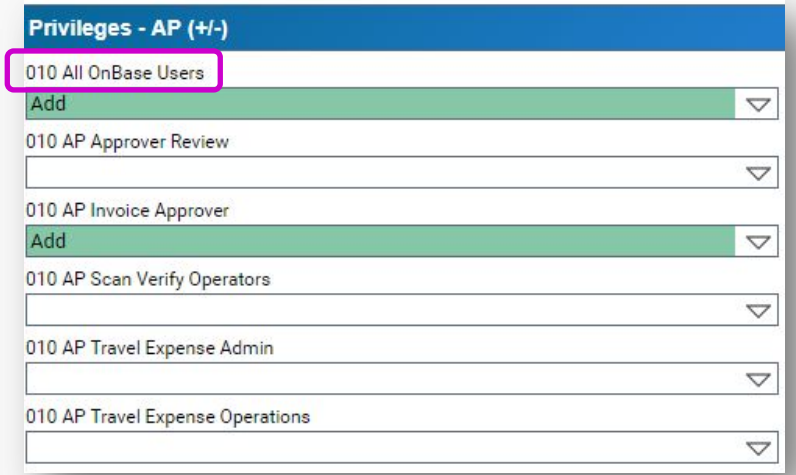
OnBase Camp \\ Innovation Day 2023

Application Access Request

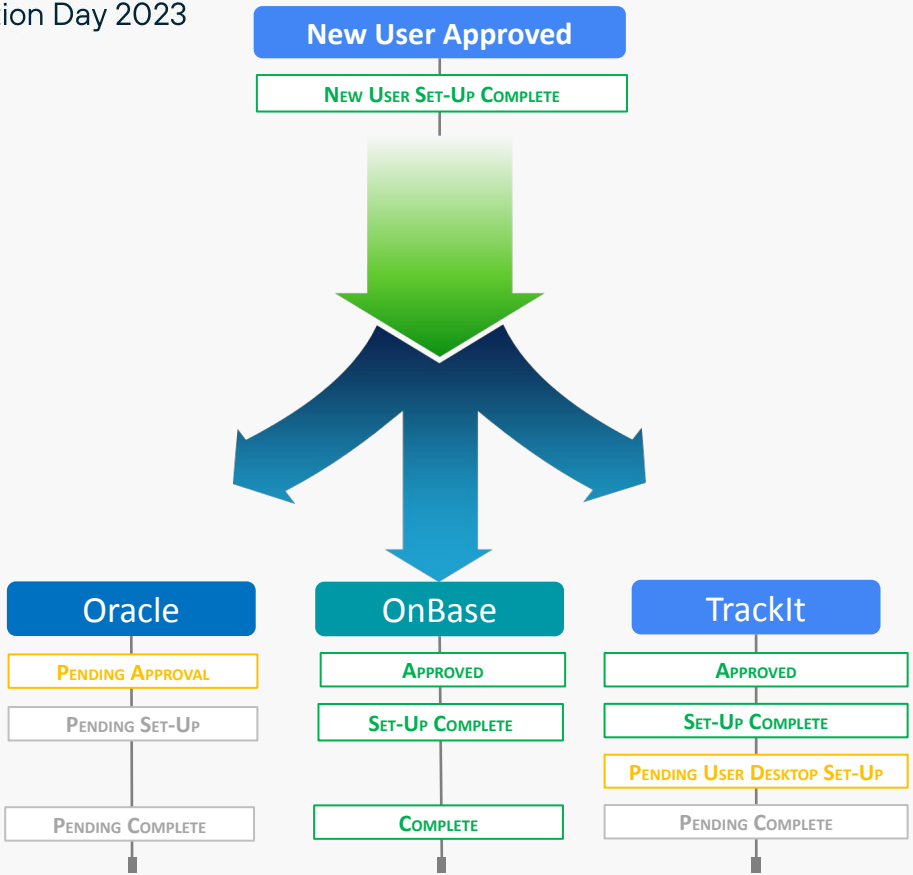


Application Access Request

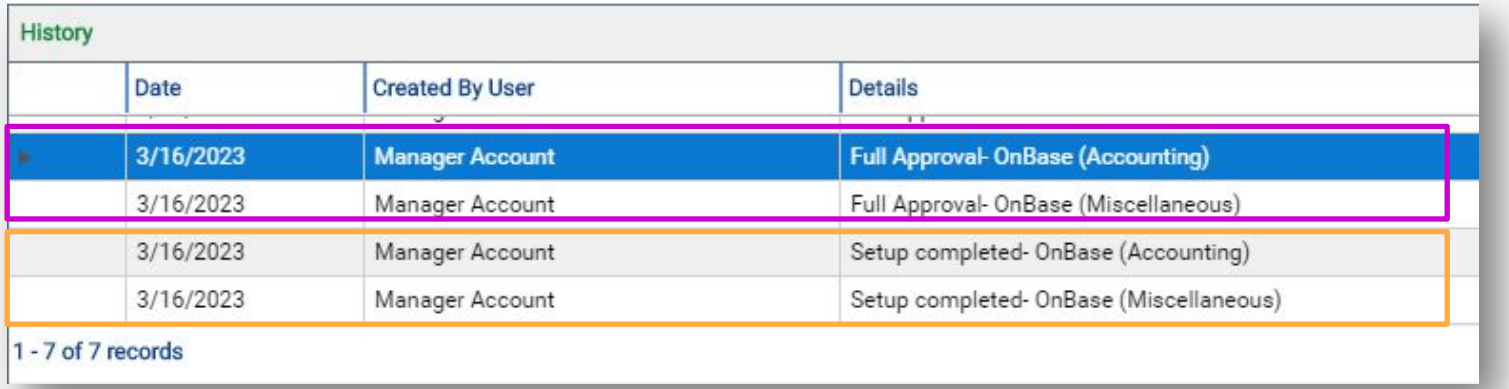




Information Owner: Responsible for the approval of user access
010: Tracks the information owner & back-up


New User Approved
New User Set-Up Complete
Oracle
Pending Approval
Pending Set-Up
Pending Complete
OnBase
Approved
Set-Up Complete
Complete
TrackIt
Approved
Set-Up Complete
Pending User Desktop Set-Up
Pending Complete

History Approval Set-Up

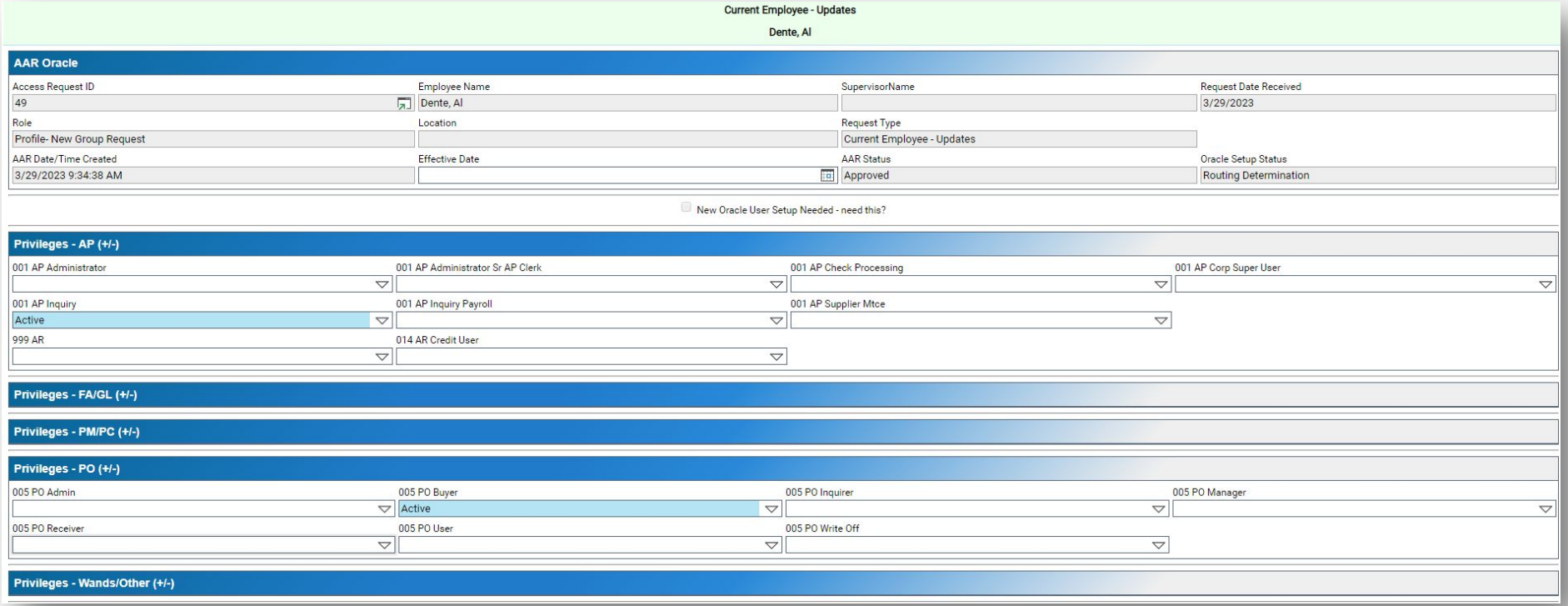


History

	Date	Created By User	Details
▶	3/16/2023	Manager Account	Full Approval- OnBase (Accounting)
	3/16/2023	Manager Account	Full Approval- OnBase (Miscellaneous)
	3/16/2023	Manager Account	Setup completed- OnBase (Accounting)
	3/16/2023	Manager Account	Setup completed- OnBase (Miscellaneous)

1 - 7 of 7 records

User Record - Oracle



Current Employee - Updates

Dente, Al

AAR Oracle

Access Request ID	Employee Name	SupervisorName	Request Date Received
49	Dente, Al		3/29/2023

Role	Location	Request Type	
Profile- New Group Request		Current Employee - Updates	

AAR Date/Time Created	Effective Date	AAR Status	Oracle Setup Status
3/29/2023 9:34:38 AM		Approved	Routing Determination

☐ New Oracle User Setup Needed - need this?

Privileges - AP (+/-)

001 AP Administrator	001 AP Administrator Sr AP Clerk	001 AP Check Processing	001 AP Corp Super User

001 AP Inquiry	001 AP Inquiry Payroll	001 AP Supplier Mtce	
Active			

999 AR	014 AR Credit User		

Privileges - FA/GL (+/-)

Privileges - PM/PC (+/-)

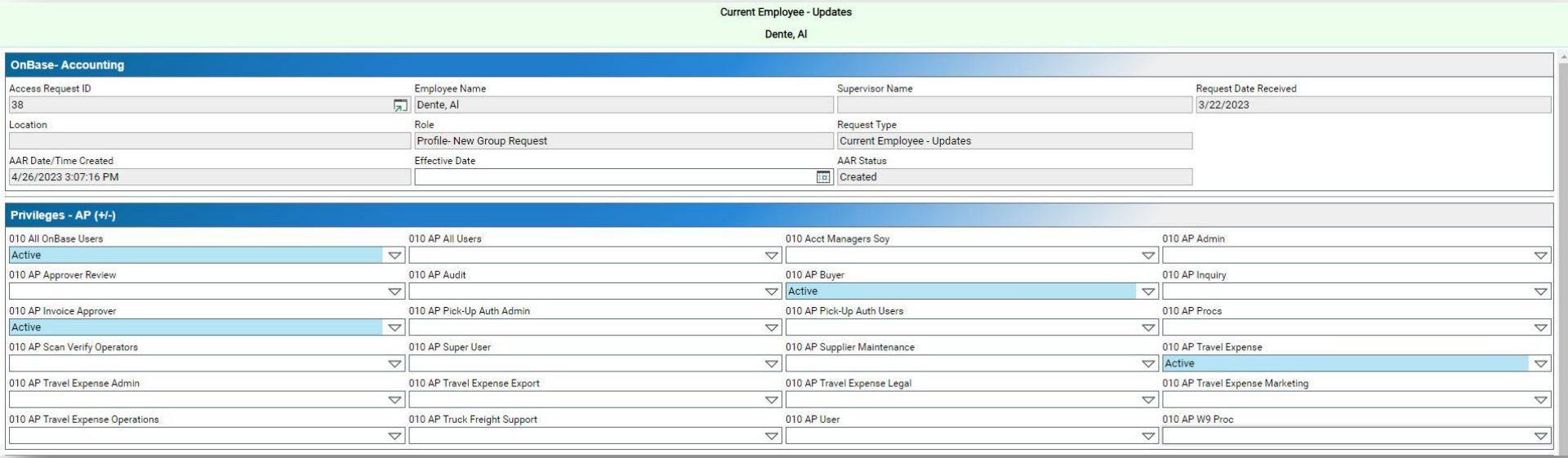
Privileges - PO (+/-)

005 PO Admin	005 PO Buyer	005 PO Inquirer	005 PO Manager
	Active		

005 PO Receiver	005 PO User	005 PO Write Off	

Privileges - Wands/Other (+/-)

User Record - OnBase



Current Employee - Updates

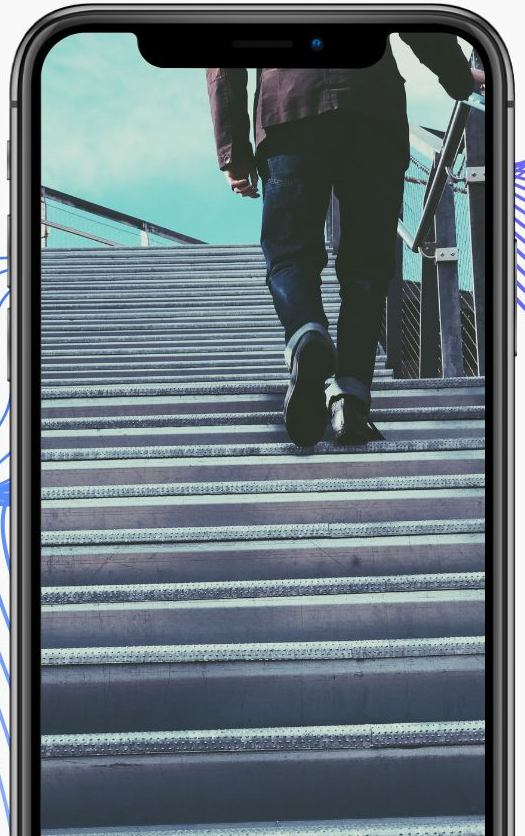
Dente, Al

OnBase- Accounting

Access Request ID	Employee Name	Supervisor Name	Request Date Received
38	Dente, Al		3/22/2023
Location	**Role**	**Request Type**	
	Profile- New Group Request	Current Employee - Updates	
AAR Date/Time Created	**Effective Date**	**AAR Status**	
4/26/2023 3:07:16 PM		Created	

Privileges - AP (+/-)

010 All OnBase Users: Active	010 AP All Users:	010 Acct Managers Soy:	010 AP Admin:
010 AP Approver Review:	010 AP Audit:	010 AP Buyer: Active	010 AP Inquiry:
010 AP Invoice Approver: Active	010 AP Pick-Up Auth Admin:	010 AP Pick-Up Auth Users:	010 AP Procs:
010 AP Scan Verify Operators:	010 AP Super User:	010 AP Supplier Maintenance:	010 AP Travel Expense: Active
010 AP Travel Expense Admin:	010 AP Travel Expense Export:	010 AP Travel Expense Legal:	010 AP Travel Expense Marketing:
010 AP Travel Expense Operations:	010 AP Truck Freight Support:	010 AP User:	010 AP W9 Proc:

Solution

- Faster
- Ease of use
- System of record