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.

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**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.
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 Exiting Value tab, shown on page 4.
9. 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

To: peoplesoft-fitst2@shared.utsystem.edu
Sent: Fri, 24 Apr 2014 13:38 PM

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=URSEQ_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.

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](image)

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

   ![Search Results](image)
3. After the form is selected from the criteria returned, the approver is taken to the Approval/Workflow page.

- 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.

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