

RCUH Financial Portal - User Profile Enhancements

New Features

1. Users with multiple user types will be combined into one user account so that only one login is required.
2. Users with multiple user types will have the ability to switch to a different user type within the Financial Portal.
3. Users will have the ability to delegate account access to a specific project account.

User Profile

Only one login is required for users with multiple user types. The User Profile screen has been updated with new features for users with multiple user types.

In the first section of the User Profile, users have the ability to select a default User Type that will be set when logging in to the Financial Portal.

RCUH User

First Name * Mele Last Name * Menehune MI [] Default User Type Fiscal Administrator (selected)

Username * mele_menehune Email * mele.menehune@hawaii.edu

New Password [Help](#) Confirm New Password Password Changed 09/24/2020 2:00 PM

Click here to select a default user type

In the next section of the User Profile, users have the ability to edit and view their Delegations and view their Project List. This section includes tabs so that users with multiple user types will have the ability to view their Project List for each user type by clicking on a specific tab for Secondary, PI, or FA.

Financial

User Type

Secondary User Principal Investigator Fiscal Administrator Central User

Delegation (Click Here to Expand)

Secondary PI **FA**

Fiscal Administrator

FA Code List

FA Code
99

User Project List

First Previous 1 2 3 4 5 6 7 8 9 10 Next Last 5

FA Code	Project #	Project Title	Inactive	Project Dates
99	0000080	1042 WITHHOLDING/PAYABLE		
99	0000174	ACCOUNTING	X	07/10-06/11
99	0000184	ACCOUNTING	X	07/11-06/12
99	0000194	ACCOUNTING	X	07/12-06/13
99	0000204	ACCOUNTING	X	07/13-06/14

Fiscal Administrator - Send Invoice in Duplicate To (Click Here to Expand)

Click on a tab to view the Project List for that user type.

Within the Secondary and PI tabs, Secondary Users and Principal Investigators can access the Default Purchase Requisition or Payment Request Information section. Within the FA tab, Fiscal Administrators (“FAs”) can access the Send Invoice in Duplicate To section.

With the User Profile enhancement, FAs will now have the ability to access multiple RCUH FO codes, and the Fiscal Administrator Manager user type has been discontinued.

Switch User

Users with multiple user types have the ability to switch to a different user type within the Financial Portal. It is no longer necessary to log out when you need to access a different user type.



To switch to a different user type, hover your cursor over the User drop down in the top right of the Menu bar and click on **Switch User**.

Select the desired User Type or Delegated Account and click on **Switch to Selected User Account**.

Switch User Account

Currently signed in as: mele_menehune - Fiscal Administrator - Financial

Full Name	User Type	System	Delegated Account
Mele Menehune	Principal Investigator	Financial	
Mele Menehune	Secondary User	Financial	
Mele Menehune	Fiscal Administrator	Financial	
Ike Pono	Principal Investigator	Financial	Y

Switch to Selected User Account

Switching to a different User Type will automatically change the menu options and access rights to reflect the current user type.

With this enhancement, the system will not allow the same user to submit and approve the same transaction document.

Validation Errors:
The same user cannot submit and approve the same document.

Delegate Account Access

The Delegate Account Access feature has been enhanced with the ability to delegate access to a specific project account. Entering a Project Number gives the delegated user access to a specific project account. Leaving the Project Number blank will give the delegated user access to all projects.

Delegation (Click Here to Collapse)

Give Delegate Account Access to Another User(s)

Existing User Account User Type Project Number Start Date End Date **Add**

Users Who Have Been Granted Access to This Account

Username	Full Name	User Type	Project #	Start Date	End Date
Ike_Pono	Ike Pono	Principal Investigator	0000005		

Edit **Remove**

The Delegate Account Access feature has also been updated for users with multiple user types. Because users only have a single login, any existing user can be found in the drop down list. The User Type drop down has been added to indicate the type of access the delegator has in relation to the delegated user. Users can only delegate access to another user with the same user type.

Delegation (Click Here to Collapse)

Give Delegate Account Access to Another User(s)

Existing User Account User Type Project Number Start Date End Date **Add**

Users Who Have Been Granted Access to This Account

Username	Full Name	User Type	Project #	Start Date	End Date
Ike_Pono	Ike Pono	Principal Investigator	0000005		

Edit **Remove**