

Requesting Web UFS Access - SoUnified

Web UFS requires cost centers / units to be set up and organized with a node ID. A node ID (think database) is linked to a primary unit number and can contain many units and/or subunits. Web UFS users must request access to each node via the SoUnified Identify & Access Request Form, and can have access to many node IDs, as required for UFS data entry or validation.

This guide is for UFS new access or UFS existing access updates. If you need to request a new node ID, please complete the New Node ID request, under the **NorAm Identity & Access Requests > Finance menu, **Web UFS New Node** option in SoUnified.

Beneficiary – Access will be assigned to the “Beneficiary”

Quick links for each request type

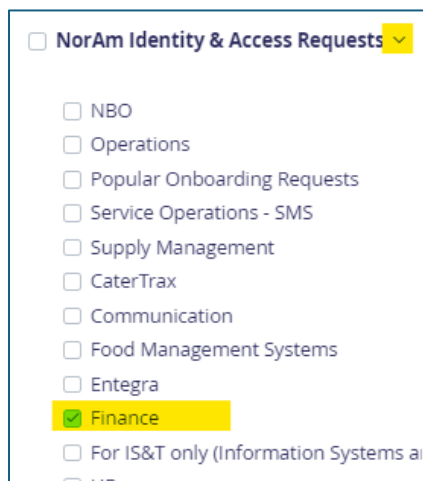
- [Web UFS Access \(New or Update\)](#)
- [Multi-user Request \(New or Update\)](#)
- [Delete All UFS Access](#)

Steps to Submitting a SoUnified Access Request for Web UFS

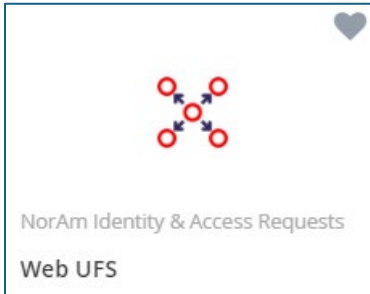
1. Log in to [SoUnified Self Service Portal](#)
 - a. Click on Sign in with G@Tes Authentication then enter your Sodexo credentials
 - b. Select role “Self-Service Mobile” and submit
2. Click on Service Catalog icon in left toolbar



3. Click the drop-down arrow for NorAm Identity & Access Requests and select **Finance** option



4. Scroll down and click on the **Web UFS** tile (you can click the heart to save this form to your favorites). The form will automatically fill in your information as requester.



5. If you are requesting access for someone that reports to you, you can click “**My Direct Reports**” to reduce the Beneficiary list to your list of employees.
6. If you are not the Beneficiary for access, click in that field, remove your name, and begin typing the last name of the user you are requesting access for, find them in the list and click to select. The form will automatically fill in the user’s information.

7. Scroll down to **Request Details**. Click the drop-down arrow to select the “**Request Type.**” Select **New/Update Access**. All current access will be displayed in the box below request type.
- a. **Selected nodes will be retained** (you can click select all)
 - b. **To remove any access, deselect that node**

Node ID	Node Name	Web UFS
<input checked="" type="checkbox"/>	Select All	
<input checked="" type="checkbox"/>	W2612340 - CAM Processing Center VA	Web UFS
<input checked="" type="checkbox"/>	W270301A - UFS Administrator-VA	Web UFS
<input checked="" type="checkbox"/>	W2942610 - MILTON HERSHEY SCHOOL	Web UFS

8. Click drop-down arrow to select Business Line of the node you are requesting

Business Line	Code
Campus Services	(W2)
Canada - English and French	(W4)
Corporate Services	(W1)
Health Care	(W3)
School Services Facilities	(W2)
School Services Food	(W6)

9. Click in the Cost Center field to enter the unit # associated with the node you are requesting (only one unit per node is necessary). Continue entering unit #'s for each different node.
 - a. If you made an error and added a unit/node you do not need, click **Edit Selected Node ID List**, click in the box and highlight the unit/node you wish to remove and “delete” to remove that node and unit from the request.
 - b. Please make sure to remove from both the “Selected Access” and “All nodes for selected cost centers” boxes to avoid issues with the submitted request.

Cost Center *

Enter Cost Center # associated with the node

Add multiple Cost Centers by repeating the search and selecting the value from the 'Cost Center' field(s).

Selected Access

Cost Center numbers will be displayed here

Edit Selected Node ID List

Click here to edit cost centers and node IDs added

All nodes for selected cost centers

Node IDs will be listed here

10. Click drop-down arrow to Select Level of Access

Select Level of Access *

Administrator

Administrator **Most common, full access**

Data Entry **Limited access, restricted reports**

e-Pay **AP electronic invoice approval access only**

Pilot **Testing only, do not use**

11. Click drop-down arrow to select UFS Category

UFS Category *

USA Campus or Government Services - Admin

Canada Admin - all divisions

USA Campus or Government Services -

USA Corporate Services - **Admin, data entry or ePay will display accordingly after selected category**

USA Health Care -

USA Schools Facilities -

USA Schools Food -

12. Add any notes to the approving manager if applicable. Please be aware, notes added here will not be viewed by the access team when completing the request.
13. When you are finished, click **Review & Submit**.
 - a. If you are not finished and need to wait, click **Save for Later** to return to the form at another time.
14. Scroll to the top of the form and review for accuracy. If there are no changes, click the submit button.
 - a. Request will be sent to the manager for approval.
 - b. If the Requester is the approving manager, the request will automatically be approved and sent for processing.

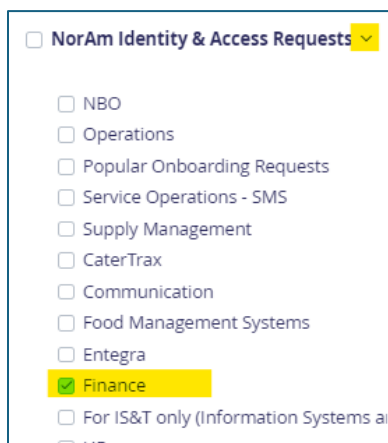
Please note there can only be one active Web UFS request at a time for the selected beneficiary. This request will be cancelled if there is already an active request pending fulfillment.

Steps to Submitting a Multiuser Account Access Request for Web UFS

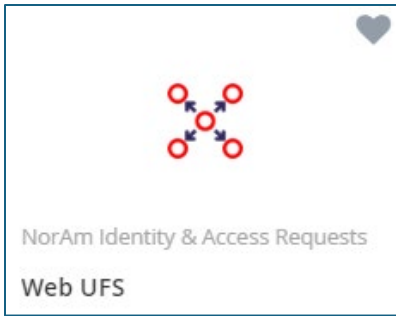
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 - a. Click on Sign in with G@Tes Authentication then enter your Sodexo credentials
 - b. Select role “Self-Service Mobile” and submit
2. Click on Service Catalog icon in left toolbar



3. Click the drop-down arrow for NorAm Identity & Access Requests and select **Finance** option



4. Scroll down and click on the **Web UFS** tile (you can click the heart to save this form to your favorites). The form will automatically fill in your information as requester.



5. If you are requesting access for someone that reports to you, you can click “**My Direct Reports**” to reduce the Beneficiary list to your list of employees.
6. If you are not the Beneficiary for access, click in that field, remove your name, and begin typing the last name of the user you are requesting access for, find them in the list and click to select. The form will automatically fill in the user’s information.

My Direct Reports To

Select this box to display only your direct reports in Beneficiary list

Requester Name

Name of person submitting request will be displayed here

Beneficiary

Access will be assigned to the "Beneficiary" (last name,)

Select from drop-down list

7. Scroll down to **Request Details**. Click to select the **Multuser Account** option. (located below “Cost Center Name” box). The Employee ID box will appear. Enter the employee ID of the multiuser account (this ID begins with a “9”). If you don’t know it, please email the UFS Administrator for assistance. unitfinancialsystemsadministration.noram@sodexo.com.
 - a. Please note, **for the multiuser account option, you must enter all access required**, to include current access you wish to keep and the access you wish to add. Anything not included will not be part of the multiuser access once the request is fulfilled.

Multuser Account

Please include all access required, and not only adjustments to access, for this request type.

Employee ID *

91234561

Please enter the employee ID of your Multuser account.

8. Click the drop-down arrow to select the “**Request Type**.” Select **New/Update Access**.
9. Click drop-down arrow to select Business Line of the node you are requesting

Business Line *

Campus Services

Campus Services (W2)

Canada - English and French (W4)

Corporate Services (W1)

Health Care (W3)

School Services Facilities (W2)

School Services Food (W6)

10. Click in the Cost Center field to enter the unit # associated with the node you are requesting (only one unit per node is necessary). Continue entering unit #'s for each different node.
 - a. Remember to enter all required access, not just the new/update
 - b. If you made an error and added a unit/node you do not need, click **Edit Selected Node ID List**, and remove that node and unit in both boxes accordingly.

Cost Center *

Enter Cost Center # associated with the node

Add multiple Cost Centers by repeating the search and selecting the value from the 'Cost Center' field(s).

Selected Access

Cost Center numbers will be displayed here

Edit Selected Node ID List

Click here to edit cost centers and node IDs added

All nodes for selected cost centers

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11. Click drop-down arrow to Select Level of Access

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USA Health Care -

USA Schools Facilities -

USA Schools Food -

13. In the **Notes to Manager** section, enter the user ID of the multi-user account you are requesting access. (i.e. jdoe7, not the employee ID # 1234567)
14. When you are finished, click **Review & Submit**.

- a. If you are not finished and need to wait, click Save for Later to return to the form at another time.
15. Scroll to the top of the form and review for accuracy. If there are no changes, click the submit button.
- a. Request will be sent to the manager for approval.
 - b. If the Requester is the approving manager, the request will automatically be approved and sent for processing.

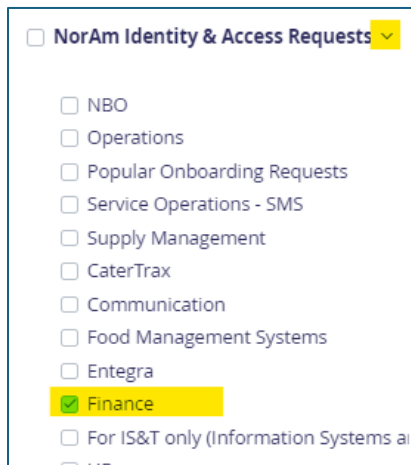
Please note there can only be one active Web UFS request at a time for the selected beneficiary. This request will be cancelled if there is already an active request pending fulfillment.

Steps to Submitting a Request to Delete all Web UFS Access

1. Log in to [SoUnified Self Service Portal](#)
 - a. Click on Sign in with G@Tes Authentication then enter your Sodexo credentials
 - b. Select role “Self-Service Mobile” and submit
2. Click on Service Catalog icon in left toolbar



3. Click the drop-down arrow for NorAm Identity & Access Requests and select **Finance** option



4. Scroll down and click on the **Web UFS** tile (you can click the heart to save this form to your favorites). The form will automatically fill in your information as requester.



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6. If you are not the Beneficiary for access, click in that field, remove your name, and begin typing the last name of the user you are requesting access for, find them in the list and click to select. The form will automatically fill in the user’s information.

The screenshot shows a form section titled 'My Direct Reports To'. At the top, there is a checked checkbox with the text 'Select this box to display only your direct reports in Beneficiary list'. Below this, there are two input fields. The first is labeled 'Requester Name' and contains the placeholder text 'Name of person submitting request will be displayed here'. The second is labeled 'Beneficiary' and contains the text 'Access will be assigned to the "Beneficiary" (last name,)' followed by a drop-down arrow. Below the drop-down arrow, there is a red text prompt 'Select from drop-down list'.

7. Click the drop-down arrow to select the “**Request Type.**” Select **Delete Access.**
8. Add any notes to the approving manager if applicable. Please be aware, notes added here will not be viewed by the access team when completing the request.
9. When you are finished, click **Review & Submit.**
 - a. If you are not finished and need to wait, click Save for Later to return to the form at another time.
10. Scroll to the top of the form and review for accuracy. If there are no changes, click the submit button.
 - a. Request will be sent to the manager for approval.
 - b. If the Requester is the approving manager, the request will automatically be approved and sent for processing.

Please note there can only be one active Web UFS request at a time for the selected beneficiary. This request will be cancelled if there is already an active request pending fulfillment.