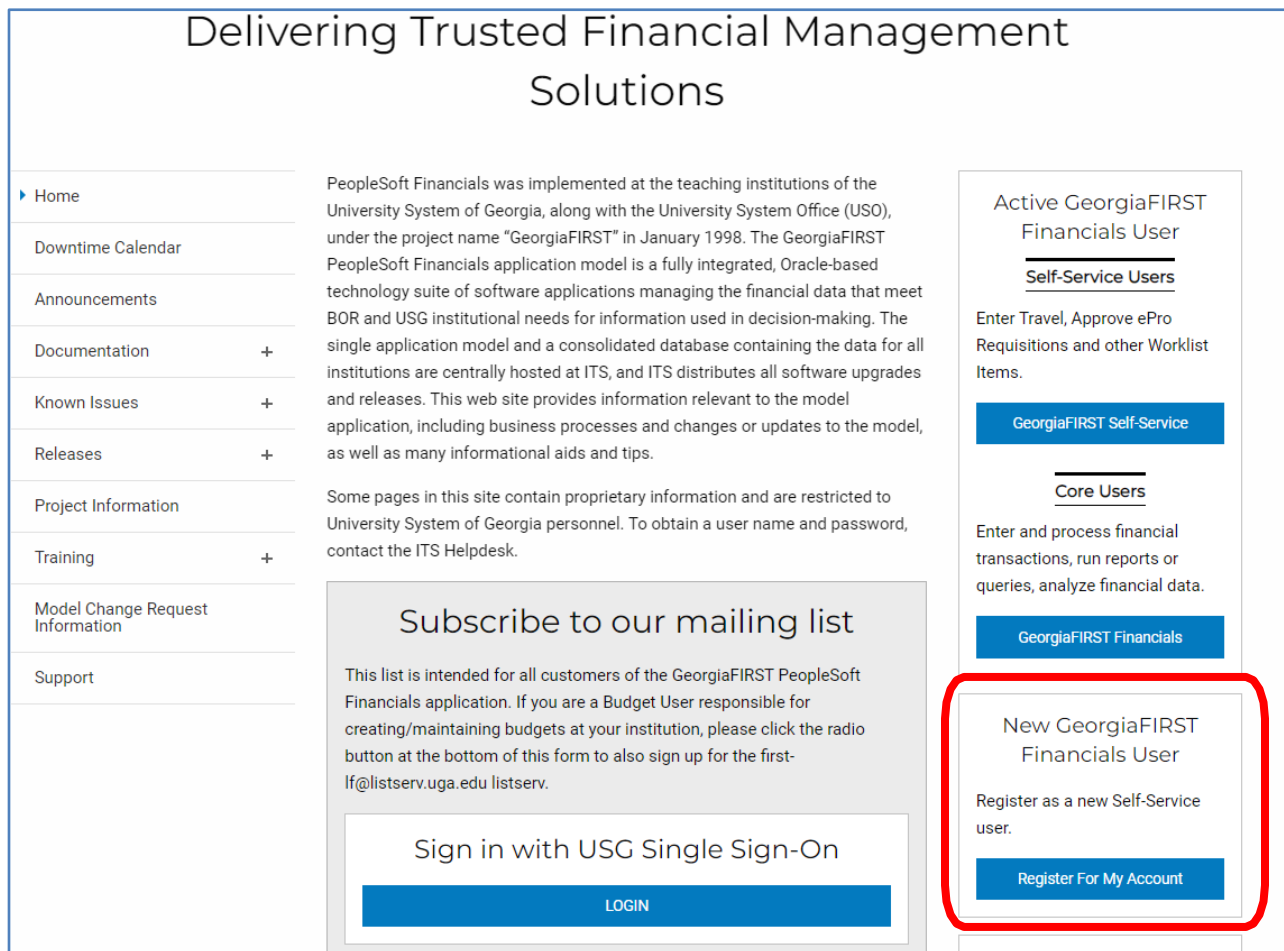


# Registering as a New Self-Service User, Reviewing Profiles, and Delegating Entry Authority

This job aid is designed to help you self-register, review your profile, and delegate entry authority in PeopleSoft Employee Self-Service.

## Step 1. Self-Service Registration in PSFIN

1. Go to <https://selfservice.fprod.gafirst.usg.edu>.
2. Select “**Register For My Account**”



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PeopleSoft Financials was implemented at the teaching institutions of the University System of Georgia, along with the University System Office (USO), under the project name "GeorgiaFIRST" in January 1998. The GeorgiaFIRST PeopleSoft Financials application model is a fully integrated, Oracle-based technology suite of software applications managing the financial data that meet BOR and USG institutional needs for information used in decision-making. The single application model and a consolidated database containing the data for all institutions are centrally hosted at ITS, and ITS distributes all software upgrades and releases. This web site provides information relevant to the model application, including business processes and changes or updates to the model, as well as many informational aids and tips.

Some pages in this site contain proprietary information and are restricted to University System of Georgia personnel. To obtain a user name and password, contact the ITS Helpdesk.

**Subscribe to our mailing list**

This list is intended for all customers of the GeorgiaFIRST PeopleSoft Financials application. If you are a Budget User responsible for creating/maintaining budgets at your institution, please click the radio button at the bottom of this form to also sign up for the first-[lf@listserv.usg.edu](mailto:lf@listserv.usg.edu) listserv.

Sign in with USG Single Sign-On

LOGIN

**Active GeorgiaFIRST Financials User**

Self-Service Users

Enter Travel, Approve ePro Requisitions and other Worklist Items.

GeorgiaFIRST Self-Service

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Core Users

Enter and process financial transactions, run reports or queries, analyze financial data.

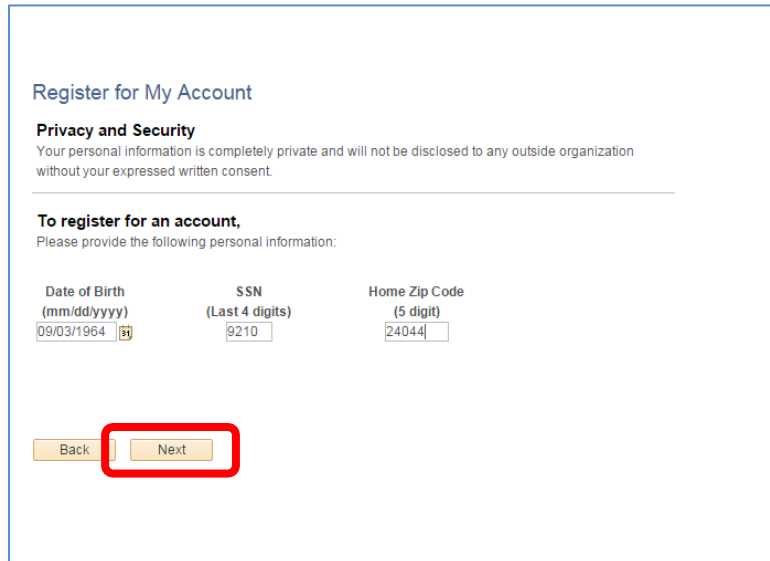
GeorgiaFIRST Financials

**New GeorgiaFIRST Financials User**

Register as a new Self-Service user.

Register For My Account

3. Enter the following information and select **NEXT**:
  - a. Date of Birth (mm/dd/yyyy)
  - b. SSN (last four digits)
  - c. Home Zip Code (5 digits)



**Register for My Account**

**Privacy and Security**  
Your personal information is completely private and will not be disclosed to any outside organization without your expressed written consent.

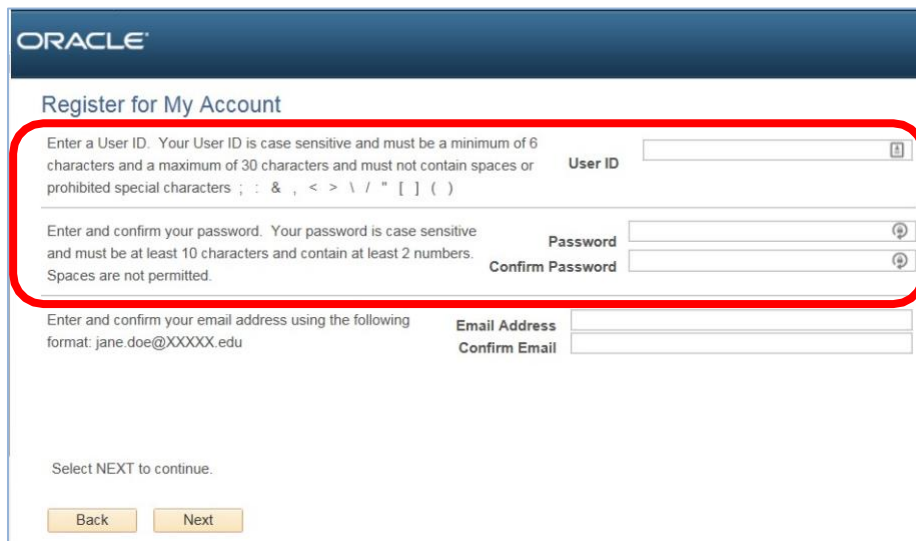
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**To register for an account,**  
Please provide the following personal information:

Date of Birth (mm/dd/yyyy)	SSN (Last 4 digits)	Home Zip Code (5 digit)
<input type="text" value="09/03/1964"/>	<input type="text" value="9210"/>	<input type="text" value="24044"/>

- You should see your active job data. If it is correct, select **Next**.
- Create a **User ID** and **Password**. Your user ID must be unique. If you receive a message saying that the user ID you entered already exists, then you must choose another one. Also, note the above criteria for user ID and password. (You may want to ask if your department has a standard format for user IDs.)

*Note:* User IDs cannot have these special characters: ; : & , < > / \ " [ ] ( )



**ORACLE**

**Register for My Account**

Enter a User ID. Your User ID is case sensitive and must be a minimum of 6 characters and a maximum of 30 characters and must not contain spaces or prohibited special characters ; : & , < > / \ " [ ] ( )

User ID

Enter and confirm your password. Your password is case sensitive and must be at least 10 characters and contain at least 2 numbers. Spaces are not permitted.

Password

Confirm Password

Enter and confirm your email address using the following format: jane.doe@XXXXX.edu

Email Address

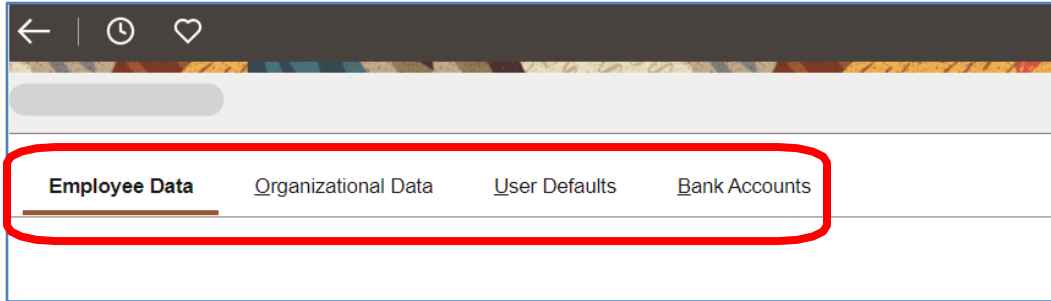
Confirm Email

Select NEXT to continue.

- Log out of the system and log back in (using URL in Step 1) with your new user ID and password.

## Step 2: Reviewing User Profile

1. Access PSFIN Self-Service: <https://selfservice.fprod.gafirst.usg.edu>.
2. Select **Employee Self-Service**.
3. Select **Travel and Expenses > Review/Edit Profile**.
4. Review information on **Employee Data** tab.



5. Review information on **Organizational Data** tab.
6. Set User defaults on **User Defaults** tab. (Optional: The **Default Creation Method** is automatically set to **Open a Blank Report**; however, if you create the same type of expense report each time, you may wish to add **Expense Defaults** or **Expense Types Defaults**. Each new expense report will be populated with these defaults. You can make manual changes to any fields or expense lines.)

**Default Creation Method**

\*Expense Report  ▼

\*Time Report  ▼

\*Travel Authorization  ▼

**Receipt Defaults**

Receipts Not Required

**Expense Defaults**

Report Description

Business Purpose  ▼

Originating Location  🔍

Expense Location  🔍

Transportation ID  🔍

Per Diem Range  ▼

Billing Type  ▼

Payment Type  🔍

Credit Card  ▼

Number of Nights

Accounting Detail Default View  ▼

**Expense Type Defaults**

Expense Type	Merchant	Payment Type	Billing Type		
*Expense Type					
<input type="text"/> ▼		<input type="text"/> ▼	<input type="text"/> ▼	<input type="button" value="+"/>	<input type="button" value="-"/>

7. Review information on **Bank Accounts** tab.

### Step 3: Delegating Entry Authority

**Please Note:** A Delegate has the ability to create expense transactions on behalf of others. Adding Delegates can be performed by a user or an expense administrator.

1. Access PSFIN Self-Service: <https://selfservice.fprod.gafirst.usg.edu>.
2. Select **Employee Self-Service**.
3. Select **Travel and Expenses**.
4. Select **User Preferences**.
5. Select **Delegate Entry Authority**.
6. Add a row by clicking the plus (+) button (multiple Delegates can be added).
7. Enter the user ID of the person you are giving authority to create expense transactions on your behalf or select the Look Up icon and search for the user.
8. Select the **Save** button.