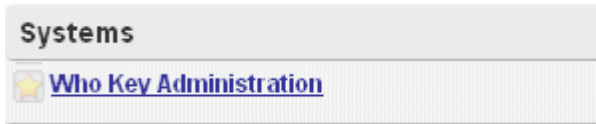


**WhoKey Owner set up**

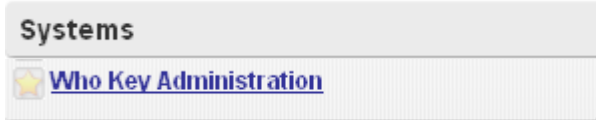
1. Budget Officer/Departmental Administrator may assign a WhoKey Owner
2. How to:
  - a. Sign into SelfService
  - b. Administration Tab
  - c. Under **Systems**
  - d. Click WhoKey Administration



- e. Find the WhoKey(s) that you will assign an owner to

**WhoKey Reviewer setup**

1. Budget Officer/Departmental Administrator(as assigned in Master Roles application above) OR a WhoKey Owner that is already assigned, may assign a WhoKey Reviewer
2. How to:
  - a. Sign into SelfService
  - b. Administration Tab
  - c. Under **Systems**
  - d. Click WhoKey Administration



- e. Find the WhoKey(s) that you will assign a reviewer to

**Budget Officer Meeting Demo of WhoKey Administration Application**

1. Display listing of Org-Dept that a person is responsible for (Budget Officer/Departmental Administrator)
2. Meaning of numbers to the right of the Org/Dept Description
 

**\*\*These numbers are helpful when first entering in WhoKey information to see which WhoKeys are incomplete. It is ALSO helpful when someone has had access removed - you can quickly see where an owner or reviewer needs to be assigned.**

  - a. Complete – number of open WhoKeys in the Org-Dept for which a *WhoKey Owner* and *WhoKey Reviewer* is assigned
  - b. Incomplete – number of open WhoKeys in the Org-Dept for which a *WhoKey Owner* and/or *WhoKey Reviewer* has not been assigned
  - c. Total – total number of open WhoKeys for that Org-Dept

☺SUMMARY OF WHOKEYS IN ORG/DEPTS THAT I HAVE RESPONSIBILITY FOR AS A BUL DEPARTMENTAL ACCOUNT REPRESENTATIVE

Org-Dept	Description	Complete	Incomplete	Total Open
<a href="#">View</a> 04-0200	Research Administration	0	35	35
<a href="#">View</a> 04-0201	Vp Research Biosciences	3	1	4
<a href="#">View</a> 04-0205	Division Of Sponsored Programs	3	3	6
<a href="#">View</a> 04-0206	Research Services Admin	2	3	5
<a href="#">View</a> 04-0207	Research Information Syst Ris	0	6	6
<a href="#">View</a> 04-0210	State Archaeologist	0	122	122
<a href="#">View</a> 04-0213	Human Subjects/Irb Office	0	9	9

3. The [View](#) link – Takes the user to the **WhoKey Information** page
  - a. The [edit](#) Link will display a drop down, allowing users to edit the WhoKeys individually
  - b. Checkboxes to allow for bulk editing of WhoKey Owner and WhoKey Reviewer information.

[Search By WhoKey Elements](#)   [Search By WhoKey User](#)

WhoKey Information

There are 6 WhoKeys for the criteria entered.

WhoKey:	Description:	Purpose:	Owner:	Owner HawkID:	Reviewer:	Reviewer HawkID:	
<input type="checkbox"/> 050-04-0207-00000-00000000-60	RESEARCH INFORMATION SYST RIS						<a href="#">edit</a>
<input checked="" type="checkbox"/> 240-04-0207-00000-00000000-60	RESEARCH INFORMATION SYST RIS						<a href="#">edit</a>
<input type="checkbox"/> 275-04-0207-00000-50600001-00	FLOOD PH I - OVPR						<a href="#">edit</a>
<input checked="" type="checkbox"/> 275-04-0207-00000-50600003-00	FLOOD PH III - OVPR						<a href="#">edit</a>
<input type="checkbox"/> 275-04-0207-00000-50600004-00	FLOOD PH IV - OVPR						<a href="#">edit</a>
<input checked="" type="checkbox"/> 900-04-0207-00000-00000000-00	RESEARCH INFORMATION SYST RIS						<a href="#">edit</a>

4. Individual Edit – the drop down box – edit *WhoKey Purpose*, *WhoKey Owner*, *WhoKey Reviewer*
  - a. User will get to this dropdown by clicking on the [edit](#) link from the WhoKey Information page
  - b. Edit *WhoKey Purpose* here – 2000 character max
  - c. Can do edits individually for *WhoKey Owner* and/or *WhoKey Reviewer* roles.
  - d. Lookup HawkID - link used to search for users

Edit WhoKey: 050.04.0200.00000.00000000.21

WhoKey details

WhoKey: 050-04-0200-00000-00000000-21  
Description: RESEARCH ADMINISTRATION

Owner HawkID\*:  [Lookup HawkID](#)

Reviewer HawkID\*:  [Lookup HawkID](#)

Purpose:

\* required field

5. Bulk Save – for *WhoKey Owner* and *WhoKey Reviewer* roles
  - a. From the WhoKey Information page, select one or many check boxes. Then click the “Transfer Roles” button.
  - b. This will take the user to the Transfer WhoKey Role page, which will display only the previously checked WhoKeys.
  - c. On the Transfer WhoKey Role page, the user can do a bulk save on *WhoKey Owner*, *WhoKey Reviewer* or both
  - d. Look-up HawkID available to search for users.
  - e. This will save the date, owner/reviewer information, and univid of person doing editing .

[Search By WhoKey Elements](#)   [Search By WhoKey User](#)

Transfer WhoKey Role

WhoKey:	Description:	Purpose:	Owner:	Owner HawkID:	Reviewer:	Reviewer HawkID:	
240-04-0207-00000-00000000-60	RESEARCH INFORMATION SYST RIS		Arnold, Jennifer	jlarnld	Alberhasky, Michael	mialber	<a href="#">e</a>
<input checked="" type="checkbox"/> 275-04-0207-00000-50600001-00	FLOOD PH I - OVPR		Arnold, Jennifer	jlarnld	Alberhasky, Michael	mialber	<a href="#">e</a>
<input type="checkbox"/> 275-04-0207-00000-50600003-00	FLOOD PH III - OVPR		Arnold, Jennifer	jlarnld	Alberhasky, Michael	mialber	<a href="#">e</a>

Owner:    Reviewer:

[Lookup HawkID](#)   [Lookup HawkID](#)

6. Search By WhoKey Elements

- a. Must enter an Org. Any additional entries – Fund, Dept, etc. will filter WhoKey data
- b. Can search by Open, Closed or All WhoKeys. No edits on Closed WhoKeys (gray). See summary below for status types & limitations:

Status	Will journal entries post to this type of account?	Are there exceptions?	Can you view this type of account in the WhoKey Administration Application?	Can you edit information in the WhoKey Administration Application for this account type?
Open WhoKey	Yes	No	Yes	Yes
Closed WhoKey	No	Yes - <b>Bypass Entries</b> are allowed to post <sup>1</sup>	Yes	No
Inactive WhoKey	No	No	No	No

<sup>1</sup> Use of Bypass Entries is limited to central administration staff at the University and UIHC in order to (1) make final adjustments to balances before making a WhoKey inactive, or (2) closing the WhoKey to other journals while analysis is performed.

<sup>2</sup> Furthermore, Inactive WhoKeys should have zero balances in all balance sheet institutional accounts.

- c. Future enhancement: Send request to close a WhoKey

[Search By WhoKey Elements](#)   [Search By WhoKey User](#)

WhoKey Input

Open    Closed    All

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WhoKey Input

Fund   Org   Dept   SubDept   Grant/Program   Func  
              

7. Search By WhoKey User

- a. Can search by HawkID, Employee ID, Last Name/First Name to find WhoKeys and roles associated to a user

[Search By WhoKey Elements](#)   [Search By WhoKey User](#)

Search By User

Please provide at least one search term.

**HawkID:**     
**Employee ID:**     
**Last Name:**     
**First Name:**  

- 8. Funds 500 & 510 – *WhoKey Owner & WhoKey Purpose* are only editable by Central Administration users.
- 9. Fund 900 – *WhoKey Owner, WhoKey Reviewer & WhoKey Purpose* are currently only editable by Central Administration users.
- 10. Students may only be assigned as *WhoKey Reviewers*