



# Peoplesoft (ERP) Finance Access Request Form User Guide

**Last Revised:** 11/27/13

## REVISION CONTROL

<b>Document Title:</b>	PeopleSoft ERP Finance Access Request Form User Guide
<b>Author:</b>	IT Training & Support
<b>File Reference:</b>	FinanceARF_SecurityBPG.docx

### Revision History

Revision Date	Revised By	Summary of Revisions	Section(s) Revised
1/18/11	Lori Arthur	Updated guide to reflect new Finance ARF changes.	<a href="#">Click here to enter Revision Date</a>
2/17/11	Lori Arthur	Updated guide to reflect new mechanism for choosing Approvers.	
3/22/11	Lori Arthur	Updated guide to reflect updated reports available for distributed users.	
5/3/13	Lori Arthur-Carmichael	Updated guide to reflect that paper ARFs are no longer accepted. Made ATI formatting changes.	
11/27/13	Lori Arthur-Carmichael	Revised guide to reflect changes made to form related to Finance DOA form.	

### Review / Approval History

Review Date	Reviewed By	Action (Reviewed, Recommended or Approved)
1/18/11	May Wong, Kerry Boyer, Joe Luzzi	Approved
2/17/11	May Wong, Kerry Boyer, Joe Luzzi	Approved
3/22/11	May Wong, Kerry Boyer, Joe Luzzi	Approved
5/3/13	May Wong, Kerry Boyer, Joe Luzzi	Approved
11/27/13	May Wong, Kerry Boyer, Joe Luzzi	Approved

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## 1.0 Access Request Form Overview

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In order to access any PeopleSoft functionality campus users must complete a PeopleSoft (ERP) Access Request Form. These forms are available online through the campus portal. A separate form is required for each of the following functional areas: Human Resources, Finance, and Student Administration. **Prior to accessing the form all popup blockers must be disabled.**

### Who completes the ARF?

An Access Request Form can be initiated either by an individual employee or another person within the division.

### When is the access granted?

Once the manager electronically approves the ARF, IT Training will assign the necessary training courses. All training requirements must be completed before any access to PeopleSoft is granted.


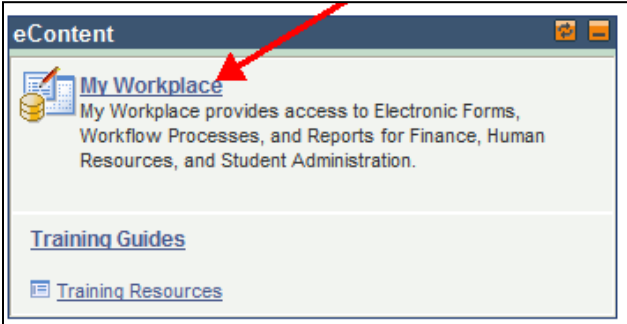



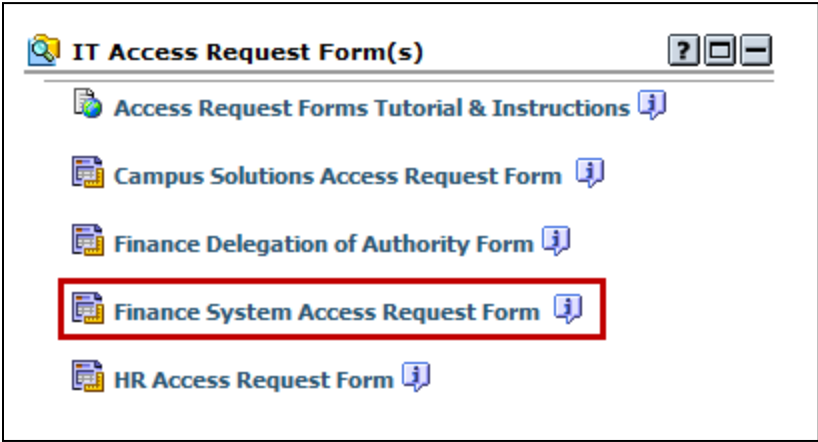



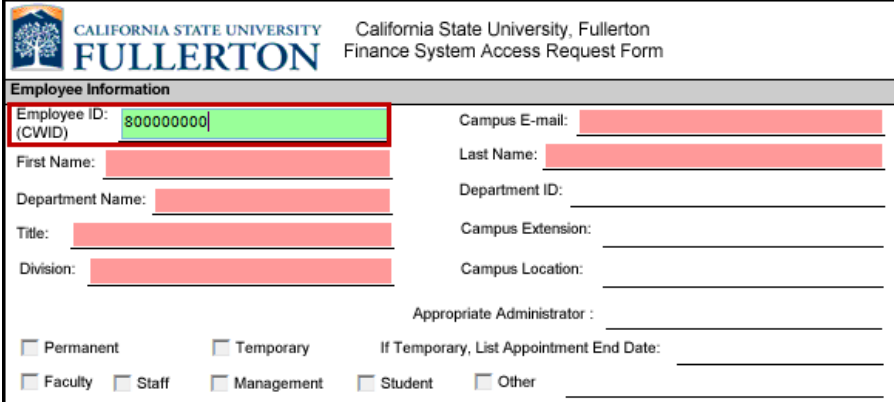
Please use the appropriate browser to successfully access the web based access request form:

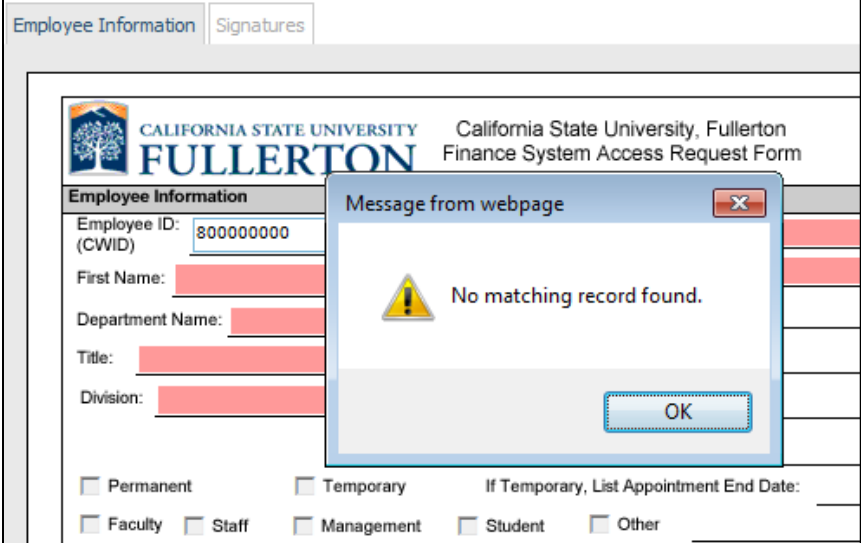
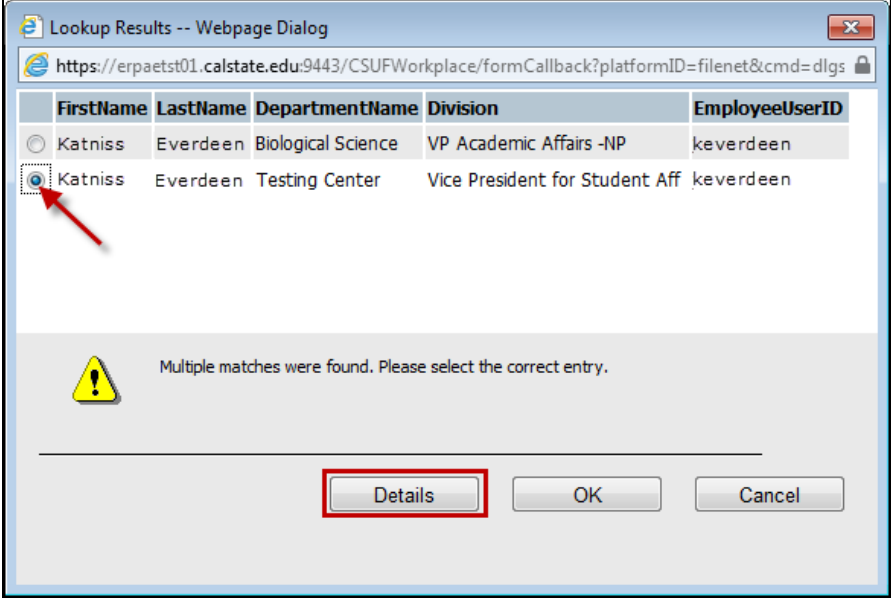
- PC – use Internet Explorer
- MAC – use Safari

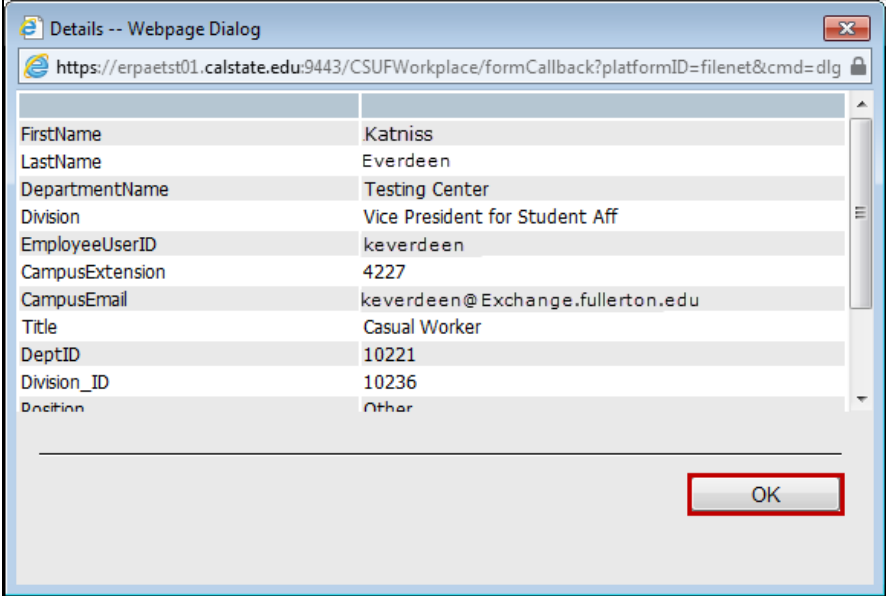
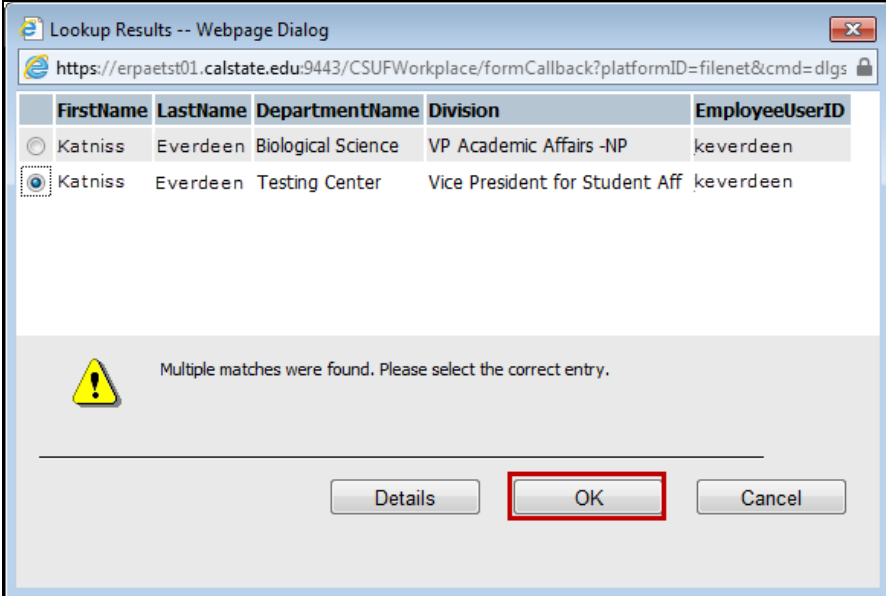
## 2.0 Access Request Form (ARF) Data Entry for Finance

To begin the process, first create a new Finance Access Request Form.

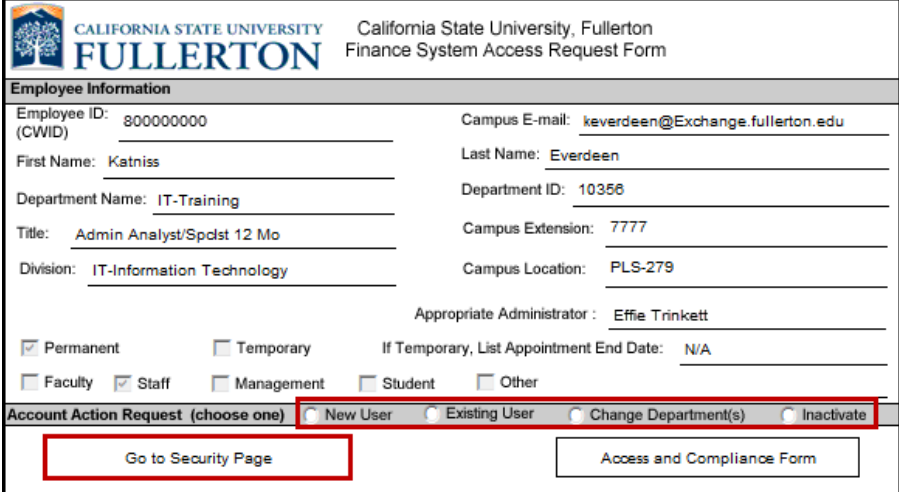


Processing Steps	Screen Shots
<p><b>Step 1:</b> Log into the <a href="#">campus portal</a>.</p> <p>Enter your campus username and password.</p> <p>Then, click <b>Login</b>.</p>	
<p><b>Step 2:</b> Next, select the <b>Titan Online</b> tab.</p>	
<p><b>Step 3:</b> Next, select <b>My Workplace</b> under the eContent section.</p>	
<p><b>Step 4:</b> Depending upon your access you may see additional forms and reports.</p> <p>To access the Access Request Form, select the <b>IT Access Request Form</b> link.</p>	





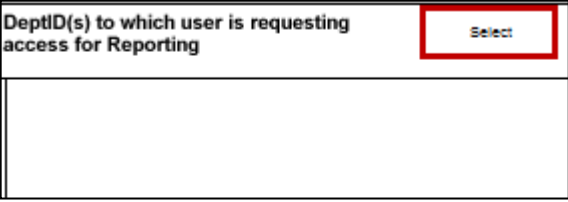
Processing Steps	Screen Shots
<p><b>Step 5:</b> Next, select the appropriate form for the required access:</p> <ul style="list-style-type: none"> <li>Finance System Access Request Form</li> </ul> <p> Prior to accessing the form all popup blockers must be disabled.</p>	
<p><b>Step 6:</b> The form opens in a new window.</p> <p>First, enter the Employee ID (CWID).</p> <p>Then, tab to the next field. Additional fields on the page will auto populate.</p> <p> Fields in green should be completed first. This will auto populate other fields on the form with PeopleSoft data.</p> <p> Verify that the employee's Appropriate Administrator is correct since this form will automatically be routed to that person for approval.</p> <p> If the form populates with incorrect personal data, contact Human Resources and close the form without continuing. This form should not be used until that data has been corrected.</p>	

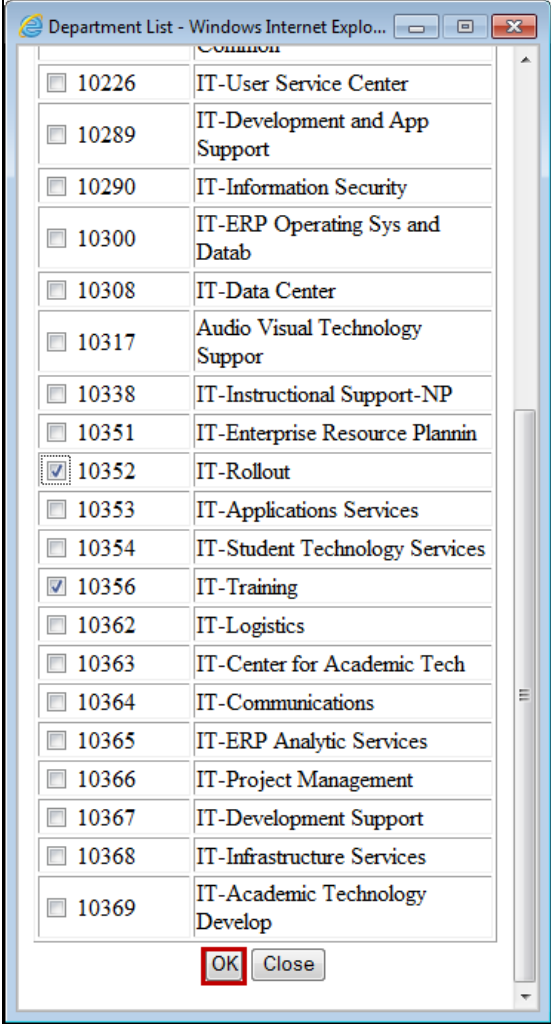
Processing Steps	Screen Shots															
<p><b>Step 6a:</b> If the CWID is not listed in PeopleSoft an error message will pop up indicating “no matching record found.”</p> <p>Contact CMS Security at <a href="mailto:cmssecurity@fullerton.edu">cmssecurity@fullerton.edu</a> with the employee’s name and CWID if you get this error message. Security personnel will assist you in getting the user added to the system.</p>	 <p>The screenshot shows the 'Employee Information' form in the PeopleSoft system. A modal dialog box titled 'Message from webpage' is displayed in the foreground, containing a yellow warning triangle icon and the text 'No matching record found.' with an 'OK' button. The background form shows fields for Employee ID (800000000), First Name, Department Name, Title, and Division, along with checkboxes for Permanent, Temporary, Faculty, Staff, Management, Student, and Other.</p>															
<p><b>Step 6b:</b> If the employee has multiple jobs on campus you will be prompted to choose the appropriate position for the form.</p> <p>To review the position information, select a position and click <b>Details</b>.</p>	 <p>The screenshot shows a 'Lookup Results -- Webpage Dialog' window. It contains a table with the following data:</p> <table border="1"> <thead> <tr> <th>FirstName</th> <th>LastName</th> <th>DepartmentName</th> <th>Division</th> <th>EmployeeUserID</th> </tr> </thead> <tbody> <tr> <td>Katniss</td> <td>Everdeen</td> <td>Biological Science</td> <td>VP Academic Affairs -NP</td> <td>keverdeen</td> </tr> <tr> <td>Katniss</td> <td>Everdeen</td> <td>Testing Center</td> <td>Vice President for Student Aff</td> <td>keverdeen</td> </tr> </tbody> </table> <p>A red arrow points to the second row. Below the table, a warning icon and the text 'Multiple matches were found. Please select the correct entry.' are displayed. At the bottom, there are 'Details', 'OK', and 'Cancel' buttons. The 'Details' button is highlighted with a red box.</p>	FirstName	LastName	DepartmentName	Division	EmployeeUserID	Katniss	Everdeen	Biological Science	VP Academic Affairs -NP	keverdeen	Katniss	Everdeen	Testing Center	Vice President for Student Aff	keverdeen
FirstName	LastName	DepartmentName	Division	EmployeeUserID												
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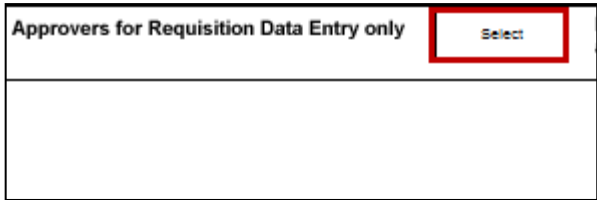
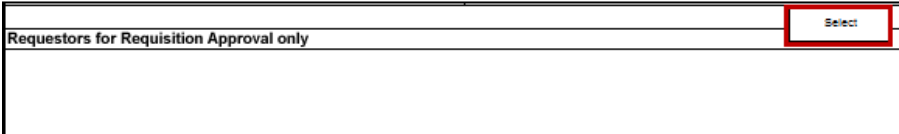


Processing Steps	Screen Shots																						
<p><b>Step 6c:</b>                      The job details will be displayed.                      Select <b>OK</b> to return to the position selection screen.</p>	 <p>The screenshot shows a web browser window titled "Details -- Webpage Dialog" with the URL <a href="https://erpaetst01.calstate.edu:9443/CSUFWorkplace/formCallback?platformID=filenet&amp;cmd=dlg">https://erpaetst01.calstate.edu:9443/CSUFWorkplace/formCallback?platformID=filenet&amp;cmd=dlg</a>. The window displays a list of employee details:</p> <table border="1"> <tr><td>FirstName</td><td>Katniss</td></tr> <tr><td>LastName</td><td>Everdeen</td></tr> <tr><td>DepartmentName</td><td>Testing Center</td></tr> <tr><td>Division</td><td>Vice President for Student Aff</td></tr> <tr><td>EmployeeUserID</td><td>keverdeen</td></tr> <tr><td>CampusExtension</td><td>4227</td></tr> <tr><td>CampusEmail</td><td>keverdeen@Exchange.fullerton.edu</td></tr> <tr><td>Title</td><td>Casual Worker</td></tr> <tr><td>DeptID</td><td>10221</td></tr> <tr><td>Division_ID</td><td>10236</td></tr> <tr><td>Division</td><td>Other</td></tr> </table> <p>An "OK" button is highlighted with a red box at the bottom right of the dialog.</p>	FirstName	Katniss	LastName	Everdeen	DepartmentName	Testing Center	Division	Vice President for Student Aff	EmployeeUserID	keverdeen	CampusExtension	4227	CampusEmail	keverdeen@Exchange.fullerton.edu	Title	Casual Worker	DeptID	10221	Division_ID	10236	Division	Other
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LastName	Everdeen																						
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Title	Casual Worker																						
DeptID	10221																						
Division_ID	10236																						
Division	Other																						
<p><b>Step 6d:</b>                      When the correct position has been identified, select the position and click <b>OK</b> to continue.</p>	 <p>The screenshot shows a web browser window titled "Lookup Results -- Webpage Dialog" with the URL <a href="https://erpaetst01.calstate.edu:9443/CSUFWorkplace/formCallback?platformID=filenet&amp;cmd=dlgs">https://erpaetst01.calstate.edu:9443/CSUFWorkplace/formCallback?platformID=filenet&amp;cmd=dlgs</a>. The window displays a table of search results:</p> <table border="1"> <thead> <tr> <th>FirstName</th> <th>LastName</th> <th>DepartmentName</th> <th>Division</th> <th>EmployeeUserID</th> </tr> </thead> <tbody> <tr> <td><input type="radio"/></td> <td>Katniss</td> <td>Everdeen</td> <td>Biological Science</td> <td>VP Academic Affairs -NP</td> <td>keverdeen</td> </tr> <tr> <td><input checked="" type="radio"/></td> <td>Katniss</td> <td>Everdeen</td> <td>Testing Center</td> <td>Vice President for Student Aff</td> <td>keverdeen</td> </tr> </tbody> </table> <p>Below the table, a yellow warning triangle icon is displayed next to the text: "Multiple matches were found. Please select the correct entry." At the bottom, there are three buttons: "Details", "OK" (highlighted with a red box), and "Cancel".</p>	FirstName	LastName	DepartmentName	Division	EmployeeUserID	<input type="radio"/>	Katniss	Everdeen	Biological Science	VP Academic Affairs -NP	keverdeen	<input checked="" type="radio"/>	Katniss	Everdeen	Testing Center	Vice President for Student Aff	keverdeen					
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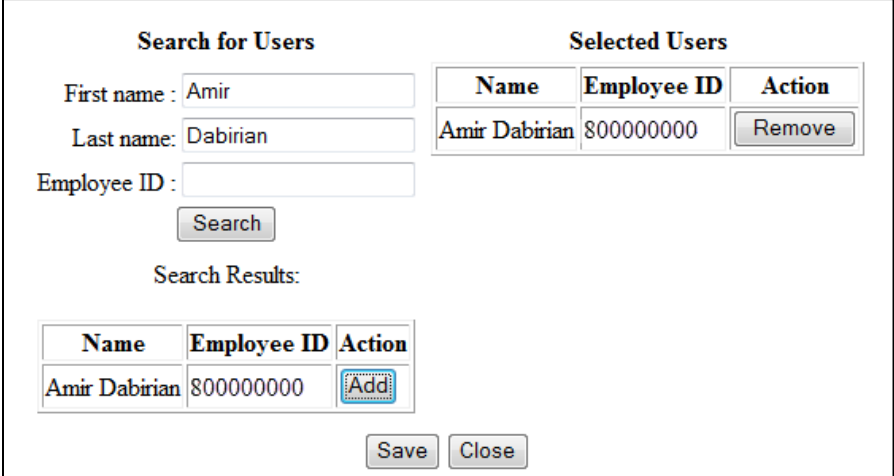





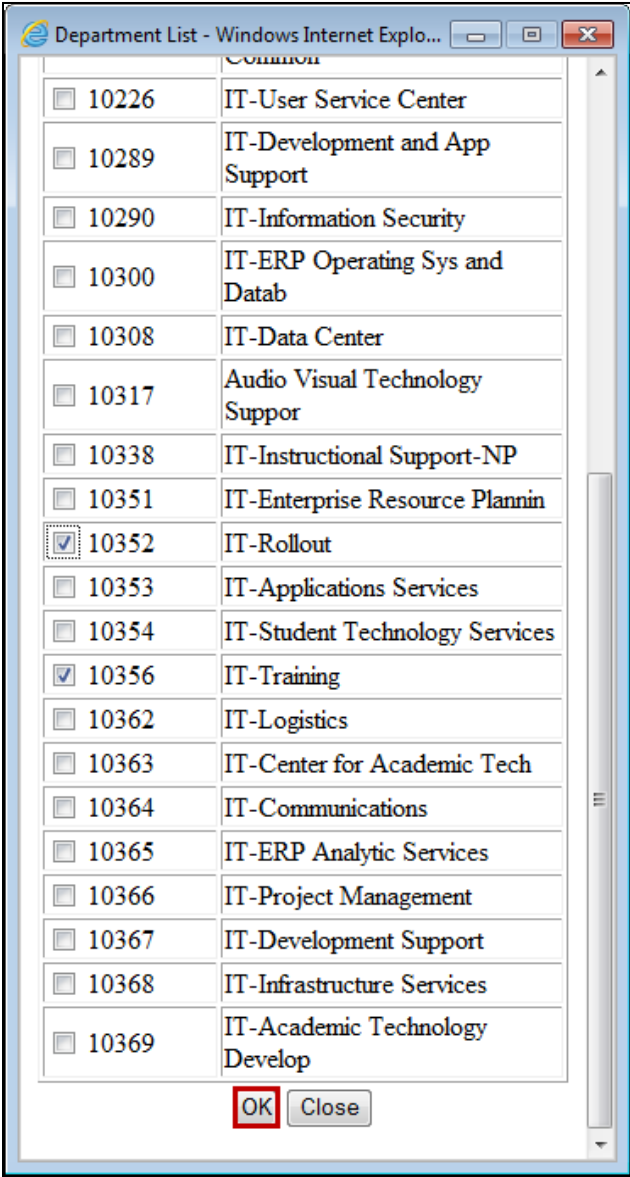
Processing Steps	Screen Shots
<p><b>Step 7:</b> Next, identify the action request:</p> <ul style="list-style-type: none"> <li>• <b>New User:</b> a user who does not currently have Finance access.</li> <li>• <b>Existing User:</b> a user whose Finance access needs to be modified.</li> <li>• <b>Change Department:</b> a user who has moved from one department to another and their Finance access needs to be modified.</li> <li>• <b>Inactivate:</b> a user whose purchase requisition approval authority and access needs to be deactivated.</li> </ul> <p>Then click on the <b>Go to Security Page</b> button.</p>	
<p><b>Step 8:</b> Select the type of access:</p> <ul style="list-style-type: none"> <li>• <b>Distributed User:</b> a user who works in a campus department.</li> <li>• <b>Central User:</b> a user who works in a Finance department such as Budget Operations, Accounts Payable, Contracts &amp; Procurement, Travel Operations, etc.</li> </ul> <p> Central Users may submit ARFs for distributed access (i.e. the ability to submit purchase requisitions on behalf of their department). When doing so, they should select Distributed User.</p>	


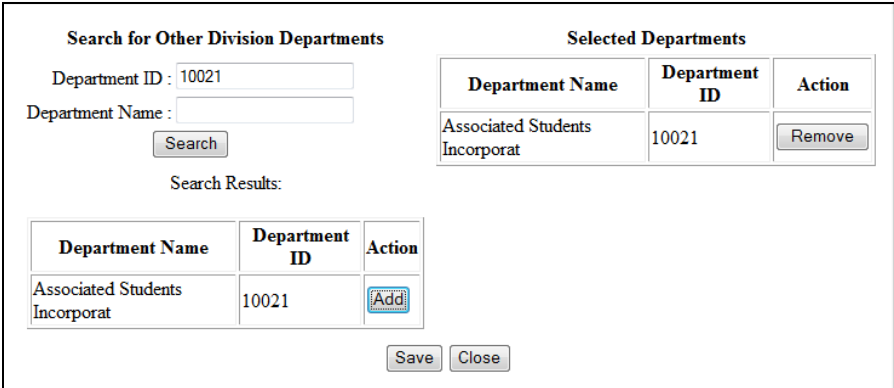
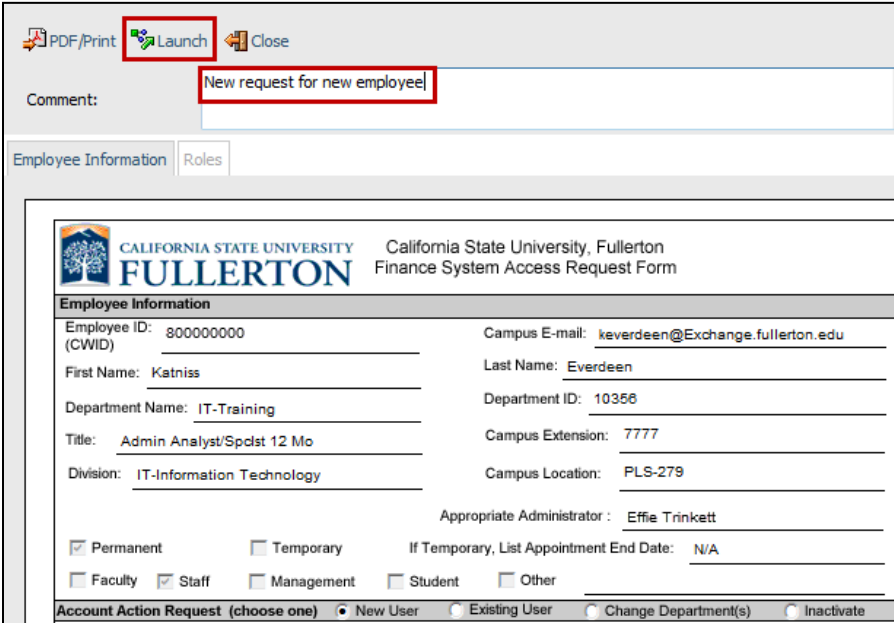
Processing Steps	Screen Shots
<p><b>Step 9:</b>                      Based upon the type of access selected, the appropriate columns become available.</p> <p>Select the <b>Add</b> box next to each role needed.</p> <p>If necessary, you can also remove any roles no longer required by choosing the <b>Remove</b> box next to the role.</p> <p> To review role descriptions, click the Role Description Reference (  ) icon.</p> <p> Please note that when Purchase Requisition Approval is selected, you must fill out the DOA for Requisition section at the bottom of the form (see Step 12)</p>	 <p>The screenshot shows the 'California State University, Fullerton Finance System Access Request Form'. Under 'Type of Access', 'Distributed User' is selected. The 'Finance Distributed Roles' section has 'Add' and 'Remove' buttons for each role. A red arrow points to the 'Role Description Reference' icon (an 'R' in a square) next to the 'Purchase Requisition Approval' role.</p>
<p><b>Step 10:</b>                      If you are requesting access to Reports, click <b>Select</b> to indicate for which department ID(s) you are requesting report access.</p>	 <p>The screenshot shows a text input field labeled 'DeptID(s) to which user is requesting access for Reporting' with a 'Select' button to its right.</p>


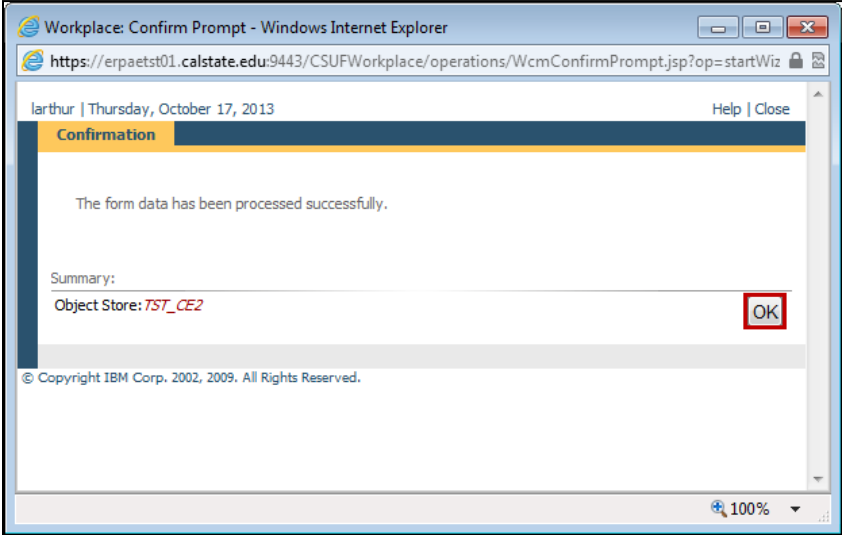
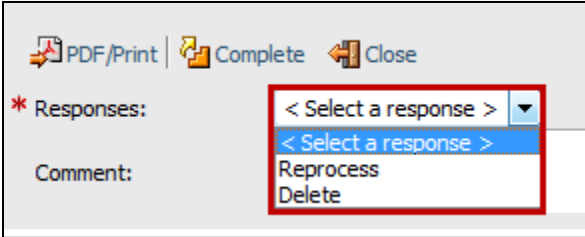
Processing Steps	Screen Shots																																										
<p><b>Step 10a:</b> Only the Department IDs for the identified division are listed.</p> <p>Choose the appropriate department(s) and click <b>OK</b>.</p>	 <p>The screenshot shows a web browser window with a list of departments. Each row contains a checkbox, a department ID, and a department name. The 'OK' button at the bottom is highlighted with a red box.</p> <table border="1"><thead><tr><th>Department ID</th><th>Department Name</th></tr></thead><tbody><tr><td><input type="checkbox"/></td><td>10226 IT-User Service Center</td></tr><tr><td><input type="checkbox"/></td><td>10289 IT-Development and App Support</td></tr><tr><td><input type="checkbox"/></td><td>10290 IT-Information Security</td></tr><tr><td><input type="checkbox"/></td><td>10300 IT-ERP Operating Sys and Datab</td></tr><tr><td><input type="checkbox"/></td><td>10308 IT-Data Center</td></tr><tr><td><input type="checkbox"/></td><td>10317 Audio Visual Technology Suppor</td></tr><tr><td><input type="checkbox"/></td><td>10338 IT-Instructional Support-NP</td></tr><tr><td><input type="checkbox"/></td><td>10351 IT-Enterprise Resource Plannin</td></tr><tr><td><input checked="" type="checkbox"/></td><td>10352 IT-Rollout</td></tr><tr><td><input type="checkbox"/></td><td>10353 IT-Applications Services</td></tr><tr><td><input type="checkbox"/></td><td>10354 IT-Student Technology Services</td></tr><tr><td><input checked="" type="checkbox"/></td><td>10356 IT-Training</td></tr><tr><td><input type="checkbox"/></td><td>10362 IT-Logistics</td></tr><tr><td><input type="checkbox"/></td><td>10363 IT-Center for Academic Tech</td></tr><tr><td><input type="checkbox"/></td><td>10364 IT-Communications</td></tr><tr><td><input type="checkbox"/></td><td>10365 IT-ERP Analytic Services</td></tr><tr><td><input type="checkbox"/></td><td>10366 IT-Project Management</td></tr><tr><td><input type="checkbox"/></td><td>10367 IT-Development Support</td></tr><tr><td><input type="checkbox"/></td><td>10368 IT-Infrastructure Services</td></tr><tr><td><input type="checkbox"/></td><td>10369 IT-Academic Technology Develop</td></tr></tbody></table>	Department ID	Department Name	<input type="checkbox"/>	10226 IT-User Service Center	<input type="checkbox"/>	10289 IT-Development and App Support	<input type="checkbox"/>	10290 IT-Information Security	<input type="checkbox"/>	10300 IT-ERP Operating Sys and Datab	<input type="checkbox"/>	10308 IT-Data Center	<input type="checkbox"/>	10317 Audio Visual Technology Suppor	<input type="checkbox"/>	10338 IT-Instructional Support-NP	<input type="checkbox"/>	10351 IT-Enterprise Resource Plannin	<input checked="" type="checkbox"/>	10352 IT-Rollout	<input type="checkbox"/>	10353 IT-Applications Services	<input type="checkbox"/>	10354 IT-Student Technology Services	<input checked="" type="checkbox"/>	10356 IT-Training	<input type="checkbox"/>	10362 IT-Logistics	<input type="checkbox"/>	10363 IT-Center for Academic Tech	<input type="checkbox"/>	10364 IT-Communications	<input type="checkbox"/>	10365 IT-ERP Analytic Services	<input type="checkbox"/>	10366 IT-Project Management	<input type="checkbox"/>	10367 IT-Development Support	<input type="checkbox"/>	10368 IT-Infrastructure Services	<input type="checkbox"/>	10369 IT-Academic Technology Develop
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Processing Steps	Screen Shots
<p><b>Step 11: Identify Requisition Requesters &amp; Approvers</b></p> <p>If you selected "Purchase Requisition Data Entry" or "Purchase Requisition Approval" in the Finance Distributed Roles section, click the <b>Select</b> button to identify the appropriate Requisition Approver(s) or Requisition Requester(s).</p> <p> If you selected "Requisition Data Entry," you will be identifying the Requisition approver(s) who can approve requisitions for this user. If you selected "Requisition Approval," you will be identifying the Requisition Requester(s) for whom this user will approve requisitions.</p>	 
<p><b>Step 11a:</b></p> <p>If you selected "Purchase Requisition Data Entry," a list of all Requisition Approvers for the user's division will appear in a new window.</p> <p>Place a check mark next to each Requisition Approver who should be able to approve this user's requisitions.</p> <p>Click <b>OK</b>.</p> <p> If the Requisition Approver does not appear on this list, please contact CMS Security. It may be that the appropriate paperwork has not been submitted to set up the Requisition Approver.</p>	

Processing Steps	Screen Shots
<p><b>Step 11b:</b> If you selected "Purchase Requisition Approval," a search page will open in a new window.</p> <p>Enter search criteria to find the user(s) that you wish to add.</p> <p>When a search result appears, click <b>Add</b> to add the user to the Selected Users list on the right.</p> <p>Click <b>Remove</b> next to a user in the Selected Users list to remove them.</p> <p>Click <b>Save</b> when you are finished adding users.</p> <p> You will only be able to select users who have requisition requester access and who are in the same division as specified in the Employee Information section.</p>	
<p><b>Step 12: DOA for Requisition Approver Only</b> If you selected "Purchase Requisition Approval" you will need to fill out the DOA for Requisition Approver section.</p> <p>First, indicate the effective date.</p>	
<p><b>Step 12a:</b> Next, indicate if the authority is permanent or temporary.</p> <p>If the authority is temporary, indicate the end date.</p>	

Processing Steps	Screen Shots																																																															
<p><b>Step 12b:</b>                      Click on <b>Select Division Departments</b> to indicate to which department(s) this user has purchase requisition approval authority.</p>	 <p>The screenshot shows a web form with a header section containing a button labeled "Select Division Depts" which is highlighted with a red rectangular box. Below the header is a section labeled "Departments" with a large empty white area underneath.</p>																																																															
<p><b>Step 12c:</b>                      Only the Department IDs for the identified division are listed.                       Choose the appropriate department(s) and click <b>OK</b>.</p>	 <p>The screenshot shows a window titled "Department List - Windows Internet Explo...". It contains a list of departments with checkboxes. The following table represents the data shown in the screenshot:</p> <table border="1"> <thead> <tr> <th>Department ID</th> <th>Department Name</th> <th>Selected</th> </tr> </thead> <tbody> <tr><td><input type="checkbox"/></td><td>10226 IT-User Service Center</td><td>No</td></tr> <tr><td><input type="checkbox"/></td><td>10289 IT-Development and App Support</td><td>No</td></tr> <tr><td><input type="checkbox"/></td><td>10290 IT-Information Security</td><td>No</td></tr> <tr><td><input type="checkbox"/></td><td>10300 IT-ERP Operating Sys and Datab</td><td>No</td></tr> <tr><td><input type="checkbox"/></td><td>10308 IT-Data Center</td><td>No</td></tr> <tr><td><input type="checkbox"/></td><td>10317 Audio Visual Technology Suppor</td><td>No</td></tr> <tr><td><input type="checkbox"/></td><td>10338 IT-Instructional Support-NP</td><td>No</td></tr> <tr><td><input type="checkbox"/></td><td>10351 IT-Enterprise Resource Plannin</td><td>No</td></tr> <tr><td><input checked="" type="checkbox"/></td><td>10352 IT-Rollout</td><td>Yes</td></tr> <tr><td><input type="checkbox"/></td><td>10353 IT-Applications Services</td><td>No</td></tr> <tr><td><input type="checkbox"/></td><td>10354 IT-Student Technology Services</td><td>No</td></tr> <tr><td><input checked="" type="checkbox"/></td><td>10356 IT-Training</td><td>Yes</td></tr> <tr><td><input type="checkbox"/></td><td>10362 IT-Logistics</td><td>No</td></tr> <tr><td><input type="checkbox"/></td><td>10363 IT-Center for Academic Tech</td><td>No</td></tr> <tr><td><input type="checkbox"/></td><td>10364 IT-Communications</td><td>No</td></tr> <tr><td><input type="checkbox"/></td><td>10365 IT-ERP Analytic Services</td><td>No</td></tr> <tr><td><input type="checkbox"/></td><td>10366 IT-Project Management</td><td>No</td></tr> <tr><td><input type="checkbox"/></td><td>10367 IT-Development Support</td><td>No</td></tr> <tr><td><input type="checkbox"/></td><td>10368 IT-Infrastructure Services</td><td>No</td></tr> <tr><td><input type="checkbox"/></td><td>10369 IT-Academic Technology Develop</td><td>No</td></tr> </tbody> </table> <p>At the bottom of the window, there are two buttons: "OK" (highlighted with a red box) and "Close".</p>	Department ID	Department Name	Selected	<input type="checkbox"/>	10226 IT-User Service Center	No	<input type="checkbox"/>	10289 IT-Development and App Support	No	<input type="checkbox"/>	10290 IT-Information Security	No	<input type="checkbox"/>	10300 IT-ERP Operating Sys and Datab	No	<input type="checkbox"/>	10308 IT-Data Center	No	<input type="checkbox"/>	10317 Audio Visual Technology Suppor	No	<input type="checkbox"/>	10338 IT-Instructional Support-NP	No	<input type="checkbox"/>	10351 IT-Enterprise Resource Plannin	No	<input checked="" type="checkbox"/>	10352 IT-Rollout	Yes	<input type="checkbox"/>	10353 IT-Applications Services	No	<input type="checkbox"/>	10354 IT-Student Technology Services	No	<input checked="" type="checkbox"/>	10356 IT-Training	Yes	<input type="checkbox"/>	10362 IT-Logistics	No	<input type="checkbox"/>	10363 IT-Center for Academic Tech	No	<input type="checkbox"/>	10364 IT-Communications	No	<input type="checkbox"/>	10365 IT-ERP Analytic Services	No	<input type="checkbox"/>	10366 IT-Project Management	No	<input type="checkbox"/>	10367 IT-Development Support	No	<input type="checkbox"/>	10368 IT-Infrastructure Services	No	<input type="checkbox"/>	10369 IT-Academic Technology Develop	No
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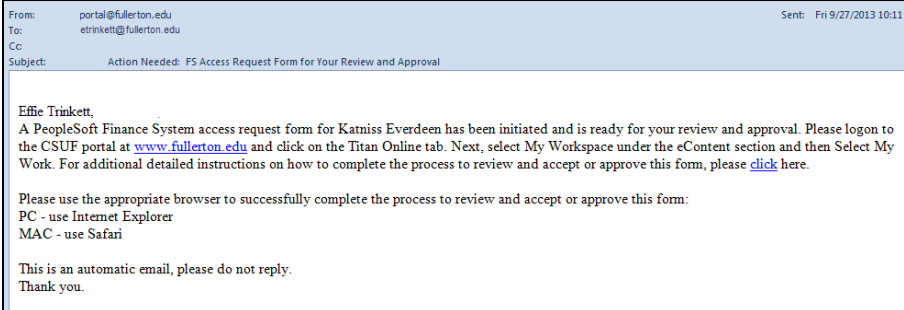


Processing Steps	Screen Shots
<p><b>Step 12d (optional):</b> If this user has purchase requisition approval authority for departments in another division on campus, click <b>Select Other Division Depts.</b></p>	
<p><b>Step 12e:</b> Enter search criteria to find the department(s) that you wish to add.</p> <p>When a search result appears, click <b>Add</b> to add the department to the Selected Departments list on the right.</p> <p>Click <b>Remove</b> next to a department in the Selected Departments list to remove them.</p> <p>Click <b>Save</b> when you are finished adding departments.</p>	
<p><b>Step 13:</b> If necessary, add any comments in the 'Comment' field.</p> <p>Then, click the <b>Launch</b> button to complete processing of the form.</p>	

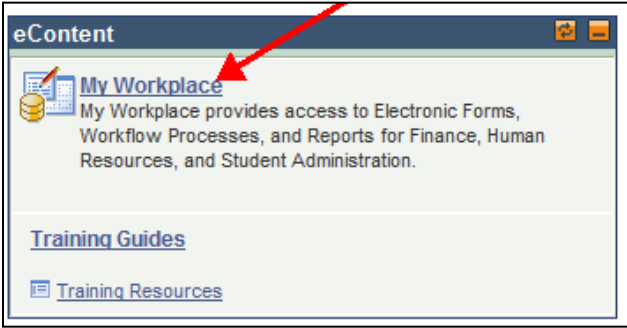
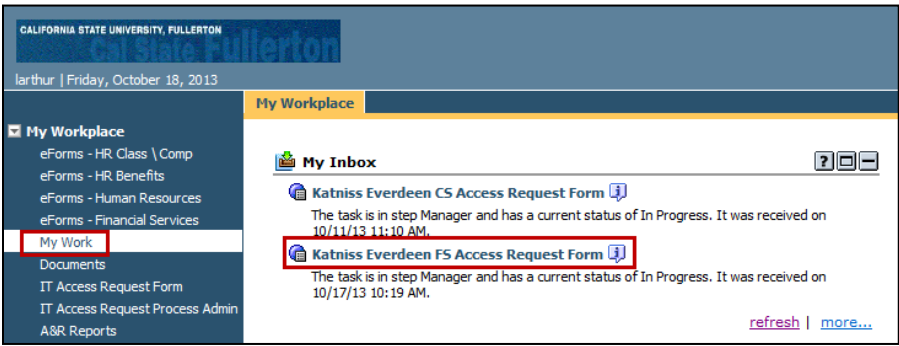
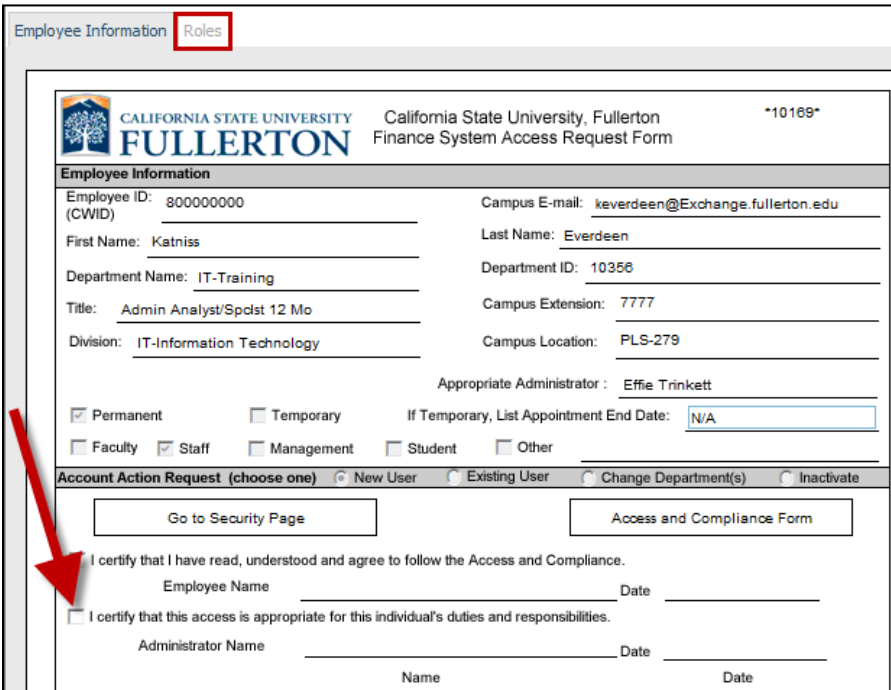
Processing Steps	Screen Shots
<p><b>Step 14:</b>                      The form is now complete.</p> <p>The appropriate manager is notified via email to electronically approve the access request form.</p> <p> Once routed to the manager, changes cannot be made to the form; however, the manager can reject the form and it will be routed back to the initiator.</p>	
<p><b>Rejected Form:</b>                      If the form is rejected and returned to the initiator:</p> <ul style="list-style-type: none"> <li>• The initiator can update and reprocess the form</li> <li>• The initiator can delete the form and start over.</li> </ul>	


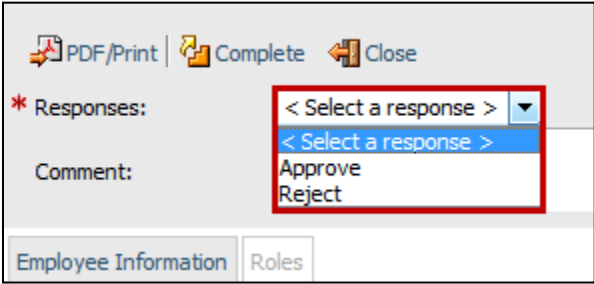

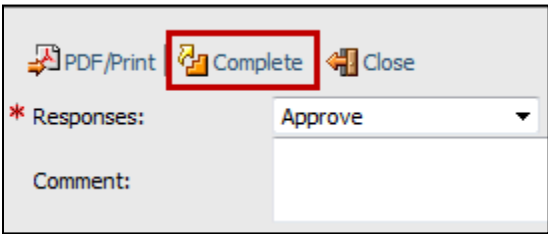
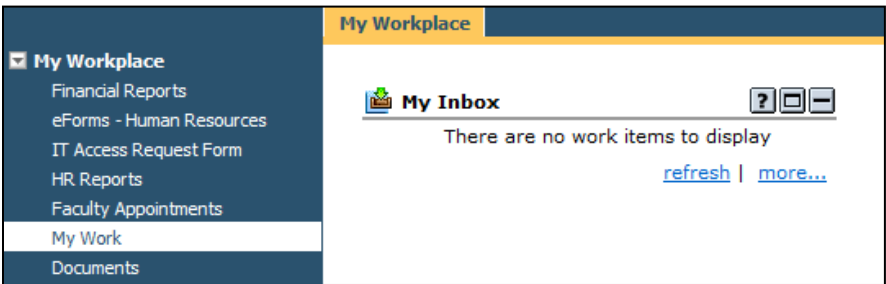


### 3.0 Manager Approval Process

Once a form is complete the appropriate manager is notified via email to review the Access Request Form (ARF).

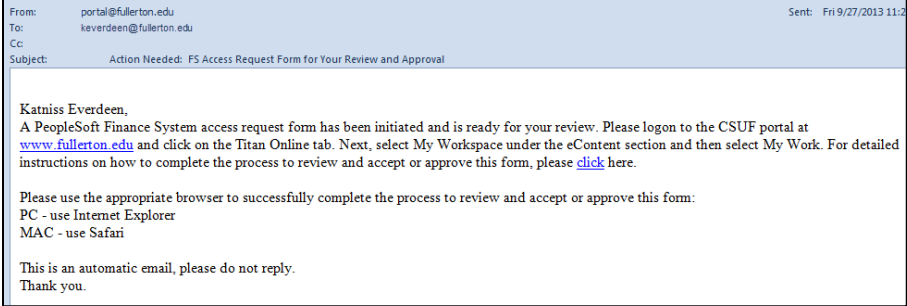
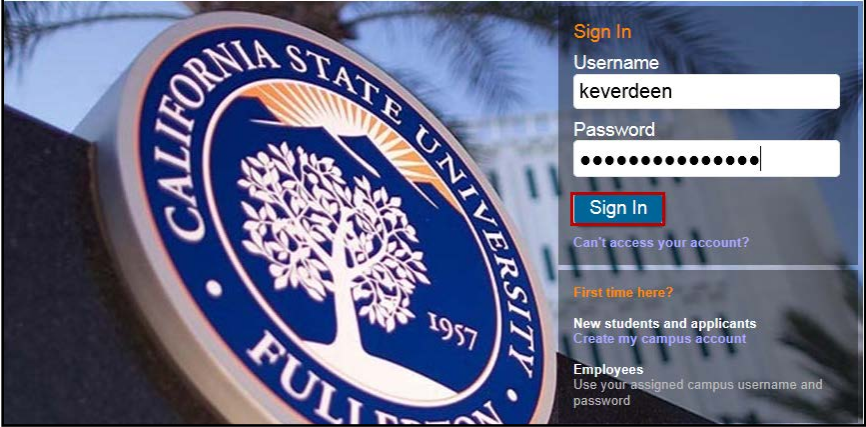

Processing Steps	Screen Shots
<p><b>Step 1:</b> The appropriate manager receives an email to review the Access Request form electronically.</p>	 <p>From: portal@fullerton.edu To: etrinkett@fullerton.edu Cc: Subject: Action Needed: FS Access Request Form for Your Review and Approval</p> <p>Sent: Fri 9/27/2013 10:11</p> <p>Effie Trinkett, A PeopleSoft Finance System access request form for Katniss Everdeen has been initiated and is ready for your review and approval. Please login to the CSUF portal at <a href="http://www.fullerton.edu">www.fullerton.edu</a> and click on the Titan Online tab. Next, select My Workspace under the eContent section and then Select My Work. For additional detailed instructions on how to complete the process to review and accept or approve this form, please <a href="#">click</a> here.</p> <p>Please use the appropriate browser to successfully complete the process to review and accept or approve this form: PC - use Internet Explorer MAC - use Safari</p> <p>This is an automatic email, please do not reply. Thank you.</p>
<p><b>Step 2:</b> Log into the <a href="#">campus portal</a>. Enter your campus username and password.  Then, click <b>Login</b>.</p>	 <p>Sign In</p> <p>Username etrinkett</p> <p>Password ●●●●●●●●</p> <p>Sign In</p> <p>Can't access your account?</p> <p>First time here?</p> <p>New students and applicants Create my campus account</p> <p>Employees Use your assigned campus username and password</p>
<p><b>Step 3:</b> Next, select the <b>Titan Online</b> tab.</p>	 <p>CALIFORNIA STATE UNIVERSITY, FULLERTON</p> <p><b>Faculty/Staff Portal</b></p> <p>My CSUF Email Library Classes TitanCard Services Webcam Training</p> <p>Titan Online Documents PCard lynda.com Web Meetings Online IT Help</p>

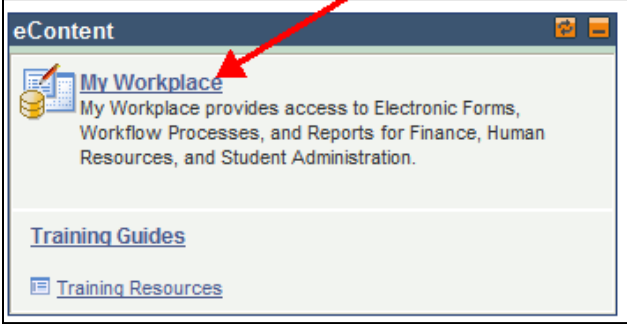
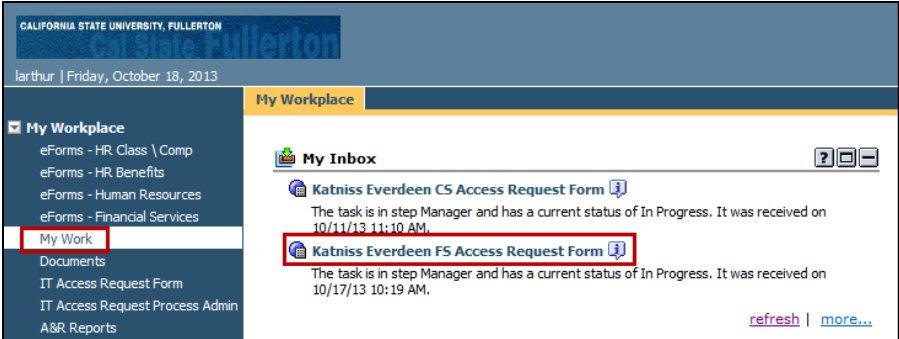
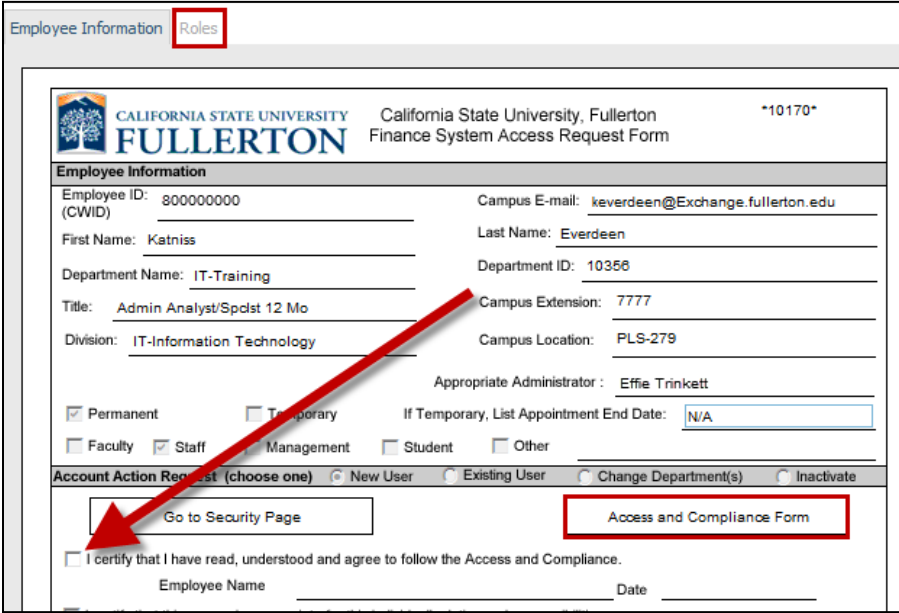
Processing Steps	Screen Shots
<p><b>Step 4:</b> Next, select <b>My Workplace</b> under the eContent section.</p>	 <p>The screenshot shows the 'eContent' header with a 'My Workplace' link highlighted by a red arrow. Below the link is a description: 'My Workplace provides access to Electronic Forms, Workflow Processes, and Reports for Finance, Human Resources, and Student Administration.' There are also links for 'Training Guides' and 'Training Resources'.</p>
<p><b>Step 5:</b> Then select <b>My Work</b>.</p> <p>The pending Access Request form will appear.</p> <p>Click on the form you want to review.</p>	 <p>The screenshot shows the 'My Workplace' dashboard for California State University, Fullerton. The 'My Inbox' section contains two items: 'Katniss Everdeen CS Access Request Form' and 'Katniss Everdeen FS Access Request Form'. Both items are marked as 'In Progress' and have their respective dates and times. A red box highlights the 'My Work' link in the left sidebar and the two items in the inbox.</p>
<p><b>Step 6:</b> Review the access request form; be sure to click on the <b>Roles</b> tab to view the requested access.</p> <p>On the Employee Information page, certify that the access is appropriate.</p>	 <p>The screenshot shows the 'Employee Information' page for Katniss Everdeen. The 'Roles' tab is selected and highlighted with a red box. The page contains various fields for employee information, including ID, name, department, and title. At the bottom, there is a section for 'Account Action Request' with radio buttons for 'New User', 'Existing User', 'Change Department(s)', and 'Inactivate'. Below this is a certification section with a red arrow pointing to the text: 'I certify that I have read, understood and agree to follow the Access and Compliance.' There are also fields for 'Employee Name', 'Date', 'Administrator Name', and 'Date'.</p>


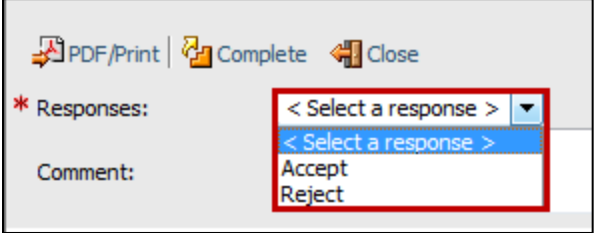
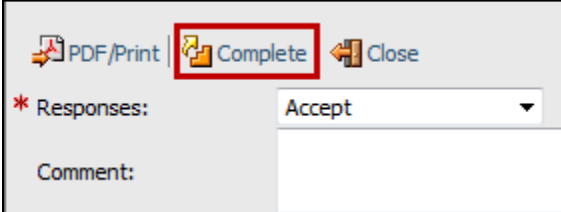

Processing Steps	Screen Shots
<p><b>Step 7:</b> Next, select either <b>Approve</b> or <b>Reject</b> from the Responses drop-down menu.</p> <p> If the request is rejected it will return to the form initiator.</p>	 <p>The screenshot shows the top of the form with buttons for PDF/Print, Complete, and Close. Below these is a 'Responses' dropdown menu with a red box around it. The dropdown is open, showing '&lt; Select a response &gt;', 'Approve', and 'Reject'. Below the dropdown is a 'Comment:' field. At the bottom, there are tabs for 'Employee Information' and 'Roles'.</p>
<p><b>Step 8:</b> Once the response is selected, click the <b>Complete</b> button.</p> <p>Note:</p> <ul style="list-style-type: none"> <li>• If the request is rejected it will return to the form initiator.</li> <li>• If the request is approved the form will move to the next appropriate party for processing.</li> </ul> <p> If the request is approved by the ISO admin office, the manager will be notified via email.</p>	 <p>The screenshot shows the top of the form with buttons for PDF/Print, Complete, and Close. The 'Complete' button is highlighted with a red box. Below these is a 'Responses' dropdown menu with 'Approve' selected. Below the dropdown is a 'Comment:' field.</p>
<p><b>Step 9:</b> The Access Request form is approved and removed from the list of pending ARF's.</p>	 <p>The screenshot shows a 'My Workplace' dashboard. On the left is a navigation menu with items like 'Financial Reports', 'eForms - Human Resources', 'IT Access Request Form', 'HR Reports', 'Faculty Appointments', 'My Work', and 'Documents'. The main area shows a 'My Inbox' section with a message: 'There are no work items to display' and links for 'refresh' and 'more...'.</p>

## 4.0 Employee Review Process

The employee must review and accept the form electronically, even if the employee initiated the Access Request Form.

Processing Steps	Screen Shots
<p><b>Step 1:</b> Employee receives an email to review the Access Request form electronically.</p>	
<p><b>Step 2:</b> Log into the campus portal. Enter your campus username and password.  Then, click <b>Login</b>.</p>	
<p><b>Step 3:</b> Next, select the <b>Titan Online</b> tab.</p>	

Processing Steps	Screen Shots
<p><b>Step 4:</b> Next, select <b>My Workplace</b> under the eContent section.</p>	
<p><b>Step 5:</b> Then select <b>My Work</b>.</p> <p>The pending Access Request form will appear.</p> <p>Click on the form you wish to electronically sign.</p>	
<p><b>Step 6:</b> The Access Request form is displayed.</p> <p>Click on the <b>Roles</b> tab to review the access being requested.</p> <p>To approve the form, first click on the <b>Access and Compliance Form</b> button on the Employee Information tab.</p> <p>Then electronically sign the form by checking the statement "I certify that I have read, understood and agree to follow the Access and Compliance form."</p>	

Processing Steps	Screen Shots
<p><b>Step 7:</b> Next, select either <b>Approve</b> or <b>Reject</b> from the Responses drop-down menu.</p> <p>You may also optionally enter a comment in the Comment field. If you reject the form, enter a comment to explain the rejection.</p> <p> If the employee rejects the access request form it is routed back to the appropriate administrator. If the appropriate administrator agrees, he/she can also reject the form. The rejected form is returned to the initiator.</p>	
<p><b>Step 8:</b> To complete the approval process, select the <b>Complete</b> link.</p>	
<p><b>Step 9:</b> The Access Request form is approved and removed from the list of pending ARF's.</p> <p>The form is routed to the Division of Information Technology.</p> <p> The Access Request form cannot be changed once approved by the employee. Please contact the ISO security admin Pat Nelson for assistance.</p> <p>Once access has been granted, the employee will be notified by the ISO administrative office.</p>	