

PeopleSoft (ERP) Campus Solutions Access Request Form


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: Campus Solutions, Human Resources, and Finance. **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 and the appropriate Business Analyst will assign the necessary training courses. All training requirements must be completed before any access to PeopleSoft is granted.




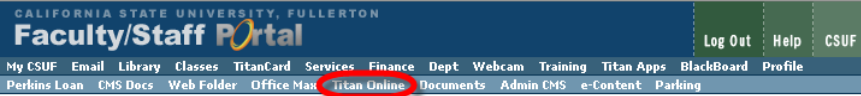
 To avoid delays in access due to significant training requirements it is recommended you submit a form for immediate access needs. Then, submit a separate form for lower priority access requests.

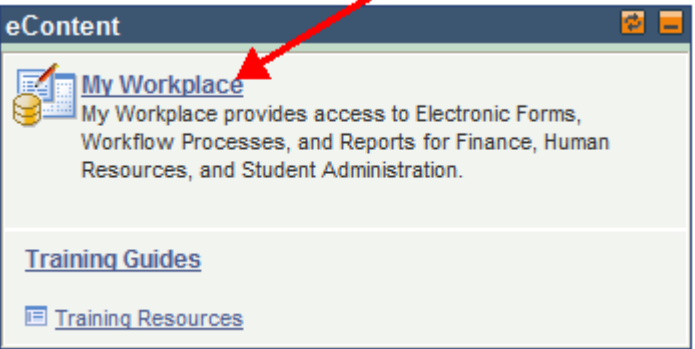

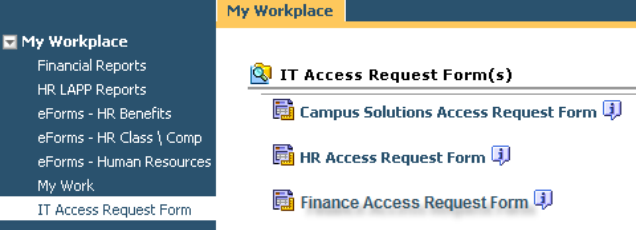
 Please use the appropriate browser to successfully access the web based access request form:

- PC – use Internet Explorer
- MAC – use Safari

This guide covers:

1. [Access Request Form \(ARF\) Data Entry for Campus Solutions](#)
 - a. [Completing the Campus Departments tab](#)
 - b. [Completing an Office Specific tab](#)
2. [Appropriate Administrator Approval Process](#)
3. [Employee Review](#)

<p><i>ARF Data Entry Campus Solutions</i></p> <p><u>Step 1:</u></p> <p>Log into the campus portal. Enter your campus username and password.</p> <p>Then, click .</p>	
<p><u>Step 2:</u></p> <p>Next, select the  tab.</p>	


<p>Step 3:</p> <p>Next, select My Workplace under the eContent section.</p>	
<p>Step 4:</p> <p>Depending upon your access you may see additional forms and reports.</p> <p>To access the Access Request Form, select the "IT Access Request Form" link.</p>	
<p>Step 5:</p> <p>Next, select the appropriate form for the required access:</p> <ul style="list-style-type: none"> - Campus Solutions Access Request Form 	 <p>⚠ Prior to accessing the form all popup blockers must be disabled.</p>


Step 6:


The form opens in a new window.

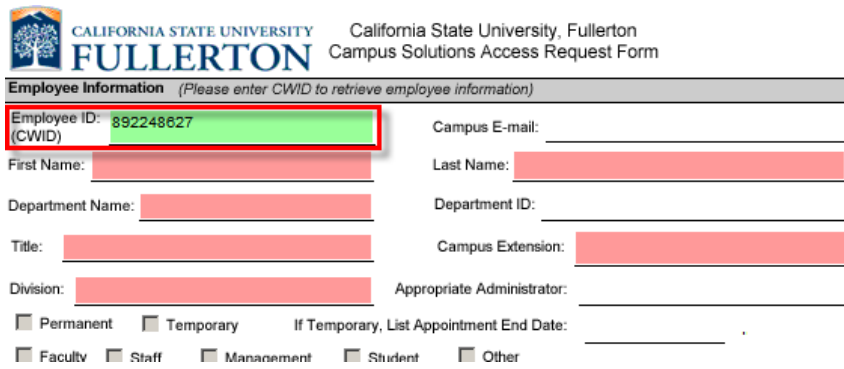
First, enter the Employee ID (CWID).

Tab to the next field. Additional fields on the page will auto populate.

 Note: Fields in green should be completed first. This will auto populate other fields on the form with PeopleSoft data.

 Verify that the employee's Appropriate Administrator is correct since this form will automatically be routed to that person for approval.

 Note: If the form populates with incorrect data, contact Human Resources and close the form without continuing. This form should not be used until that data has been corrected.



CALIFORNIA STATE UNIVERSITY FULLERTON
California State University, Fullerton
Campus Solutions Access Request Form

Employee Information (Please enter CWID to retrieve employee information)

Employee ID: 892248627 (CWID) Campus E-mail: _____

First Name: _____ Last Name: _____

Department Name: _____ Department ID: _____

Title: _____ Campus Extension: _____

Division: _____ Appropriate Administrator: _____


Permanent Temporary If Temporary, List Appointment End Date: _____

Faculty Staff Management Student Other


Step 6a:

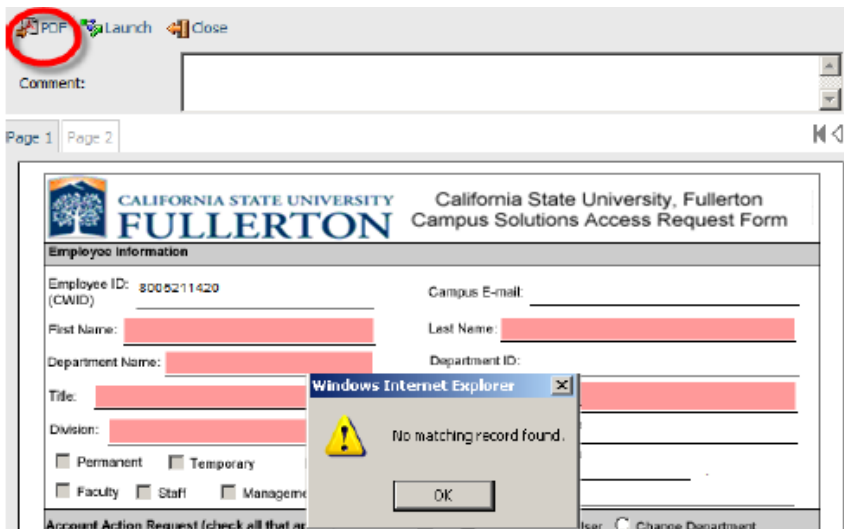
If the CWID is not listed in PeopleSoft the following error will occur:



To continue, complete the entire form manually. Then, select the  button to print.

Send the manually completed form to LH-700 Attn: Security.

 The Access Request Form must only be completed manually if an error occurs.



PDF Launch Close

Comment: _____

Page 1 Page 2

CALIFORNIA STATE UNIVERSITY FULLERTON
California State University, Fullerton
Campus Solutions Access Request Form

Employee Information

Employee ID: 8005211420 (CWID) Campus E-mail: _____

First Name: _____ Last Name: _____

Department Name: _____ Department ID: _____

Title: _____

Division: _____

Permanent Temporary

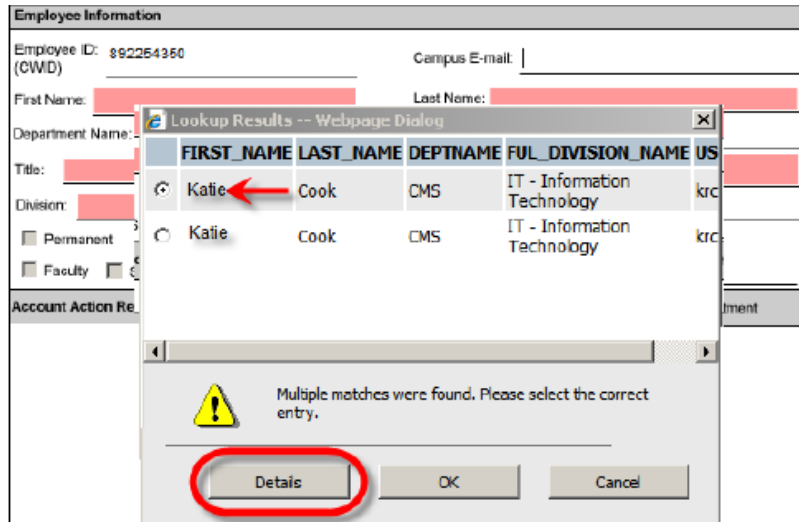
Faculty Staff Management

Account Action Request (check all that apply) User: Change Department

Step 6b:

If the employee has multiple jobs on campus you will be prompted to choose the appropriate position for the form.

To review the position information, select a position and click

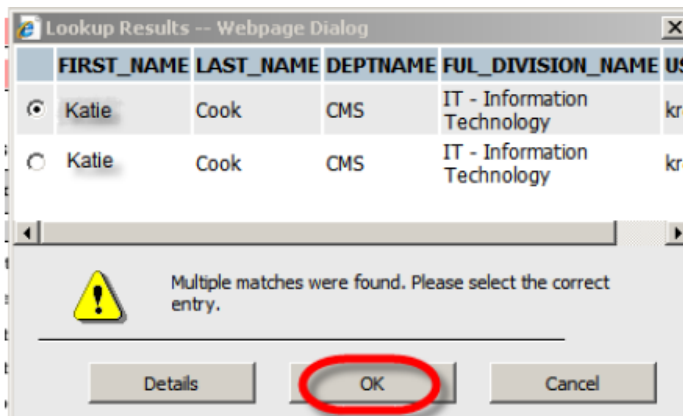
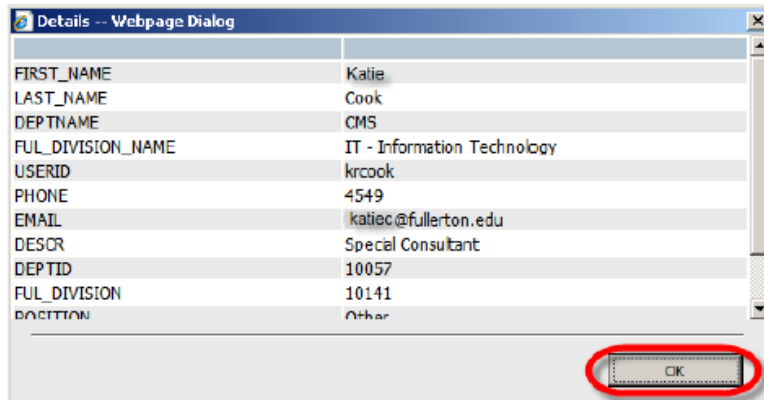


Step 6c:

The job details will be displayed.

Select to return to the position selection screen.

When the correct position has been identified, select the position and click to continue.



Step 7:

Next, identify the action request:

- New User
- Existing User
- Change Department

Account Action Request (choose one) New User Existing User Change Department

Note: Change Department will remove all your previous PeopleSoft access/roles.

Step 8:

The Comments (Read only) section will populate with any comments typed into the "comment" section upon saving the form.

Step 9:

Based upon the employee information, only the appropriate security page may be completed.

Select the **Go to Security Page** button to complete the appropriate tab.

For instructions on how to complete the Departments Tab click [here](#).

For instructions on how to complete an Office specific Tab, click [here](#).



Only complete the appropriate security page; otherwise, you will receive an error message.

- Department Tab – used by those working in Campus Departments

All other tabs are only used by campus employees working in that particular office.

Tab Name	Who uses this tab?
Admissions Office	Used solely for Admissions Office employees
Records Office	Used solely for Student Records Office employees
Scheduling Office	Used solely for Scheduling Office employees
Financial Aid	Used solely for Financial Aid Office employees
Student Financials	Used solely for Student Financials employees
Extended Education	Used solely for Extended Education employees
International Ed	Used solely for International Education employees

Completing the Departments Tab

Step 1:

First, identify your campus department.

If your department is not listed, use the "Other" option.

The department specified determines most security needs for this employee.

If additional specific security is to be added or removed, use the Security Request portion of the form.

[Employee Info](#) | **Departments** | [Admissions Office](#) | [Records Office](#) | [Scheduling Office](#) | [Financial Aid](#) | [Student Financial Services](#)


CALIFORNIA STATE UNIVERSITY FULLERTON
California State University, Fullerton
Campus Solutions Access Request Form

DEPARTMENTS

Office (check one)

<input type="radio"/> Academic Advising	<input type="radio"/> Graduate Admissions Advisor	<input type="radio"/> Judicial Affairs
<input type="radio"/> Academic Department	<input type="radio"/> Graduate Studies Office	<input type="radio"/> Library
<input type="radio"/> Athletic Office	<input type="radio"/> Graduation Check Reviewer	<input type="radio"/> New Student Orientation
<input type="radio"/> College of Education/Credentials	<input type="radio"/> Health Center	<input type="radio"/> Outreach Office
<input type="radio"/> Credentials Office	<input type="radio"/> Human Resources	<input type="radio"/> Payroll
<input type="radio"/> Dean of Students	<input type="radio"/> Irvine Campus Academic Advising	<input type="radio"/> Public Safety
<input type="radio"/> Disabled Student's Office	<input type="radio"/> Irvine Campus Reg / Cashiering	<input type="radio"/> Testing Center
<input type="radio"/> EOP Office	<input checked="" type="radio"/> Other <u>Analytical Studies</u>	
<input type="radio"/> Freshman Programs		

Step 2:

If applicable, in the Security Request section select the "add" box next to each additional role needed.



Roles with an * require a business justification.

Enter the justification into the "Business Justification" area for each role requested with an *




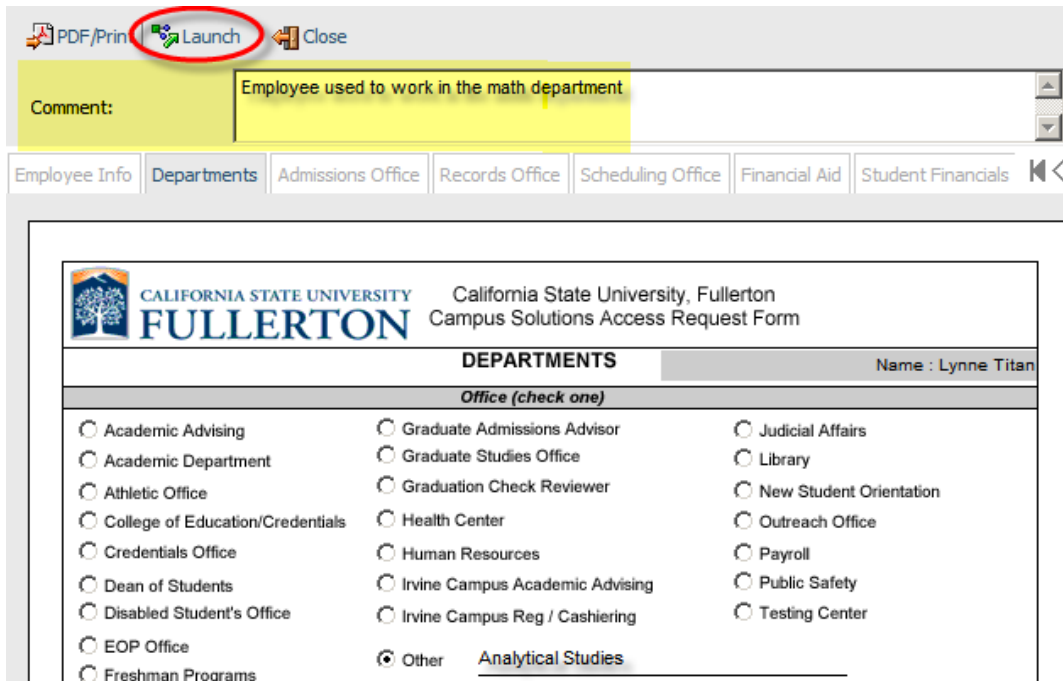
If necessary, you can also remove any roles no longer required by choosing the 'remove box' next to the role.

SECURITY REQUEST Note: "*" = Business Justification needed			
<i>Curriculum Security (select any)</i>			
<input checked="" type="checkbox"/> Add	<input type="checkbox"/> Remove	<input type="checkbox"/> Add	<input type="checkbox"/> Remove
<input type="checkbox"/>	<input type="checkbox"/> Class Schedule Update	<input type="checkbox"/>	<input type="checkbox"/> View Class Schedule / Course Catalog (in addition to Online Search)
<input type="checkbox"/>	<input type="checkbox"/> Update Enrollment Limit	<input type="checkbox"/>	<input type="checkbox"/> Other
<i>Records Security (select any)</i>			
<input checked="" type="checkbox"/> Add	<input type="checkbox"/> Remove	<input type="checkbox"/> Add	<input type="checkbox"/> Remove
<input type="checkbox"/>	<input type="checkbox"/> Place Registration Permits	<input type="checkbox"/>	<input type="checkbox"/> View CSUF Unofficial Transcript
<input type="checkbox"/>	<input type="checkbox"/> Update Service Indicators	<input type="checkbox"/>	<input type="checkbox"/> View Service Indicators
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/> Other
<i>Admissions Security (select any)</i>			
<input checked="" type="checkbox"/> Add	<input type="checkbox"/> Remove	<input type="checkbox"/> Add	<input type="checkbox"/> Remove
<input type="checkbox"/>	<input type="checkbox"/> *View Ethnicity	<input type="checkbox"/>	<input type="checkbox"/> View Student Center
<input type="checkbox"/>	<input type="checkbox"/> View Imaged Documents	<input type="checkbox"/>	<input type="checkbox"/> View Undergrad Applications
<input type="checkbox"/>	<input type="checkbox"/> * View Name History	<input type="checkbox"/>	<input type="checkbox"/> * View Visa Status
<input type="checkbox"/>	<input type="checkbox"/> * View Residency	<input type="checkbox"/>	<input type="checkbox"/> Other
<i>My Queries (select any)</i>			
<input checked="" type="checkbox"/> Add	<input type="checkbox"/> Remove	<input type="checkbox"/> Add	<input type="checkbox"/> Remove
<input type="checkbox"/>	<input type="checkbox"/> Classes	<input type="checkbox"/>	<input type="checkbox"/> End of Term
<input type="checkbox"/>	<input type="checkbox"/> Commencement	<input type="checkbox"/>	<input type="checkbox"/> Enrollment
<input type="checkbox"/>	<input type="checkbox"/> Degree Checkout	<input type="checkbox"/>	<input type="checkbox"/> Other
<i>Financial Aid Security (select any)</i>			
<input checked="" type="checkbox"/> Add	<input type="checkbox"/> Remove	<input checked="" type="checkbox"/> Add	<input type="checkbox"/> Remove
<input type="checkbox"/>	<input type="checkbox"/> * FA Status Page	<input type="checkbox"/>	<input type="checkbox"/> Scholarship
<input type="checkbox"/>	<input type="checkbox"/> Need Summary Page	<input type="checkbox"/>	<input type="checkbox"/> Award Letter
<input type="checkbox"/>	<input type="checkbox"/> * Budget / Need	<input type="checkbox"/>	<input type="checkbox"/> Other
Business Justification			
I need to view ethnicity for the Chancellor's Office student population report.			
Business Analyst Comment (Security Office use only)			

Type business justification for any roles requested that contain an *

Step 3:

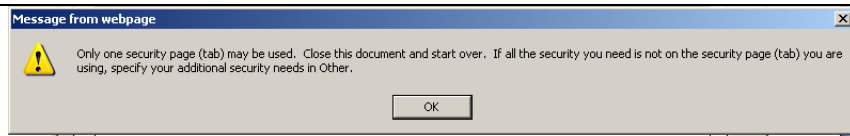
If necessary, add any comments in the 'Comment' field. Comments will appear on the Employee Info tab upon launching the form. Then, select the  Launch link to complete processing of the form.




Step 3a:

If more than one page is completed you will receive an error message.

Close the current form and continue by completing a new access request form.




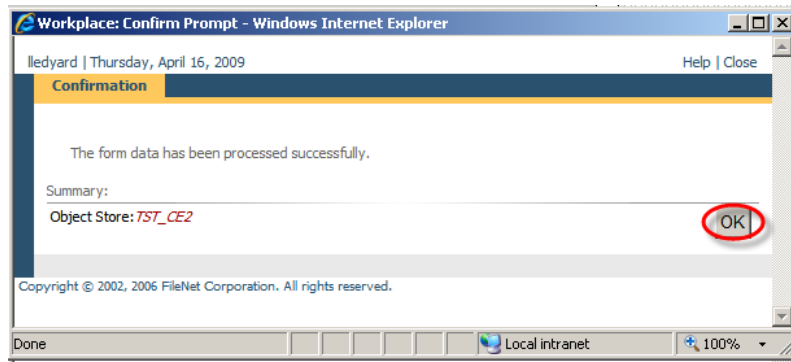
 Remember - select the **Go to Security Page** button to complete only the appropriate tab to avoid the error message.

Step 4:

The form is now complete.

The appropriate administrator is notified via email to electronically approve the access request form.

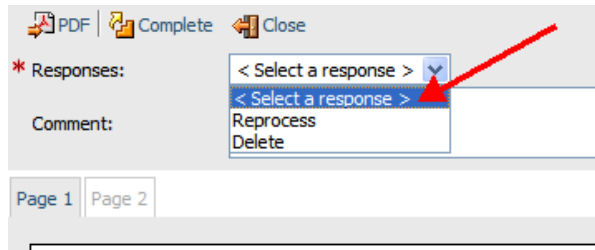
 Once routed to the appropriate administrator, changes cannot be made to the form; however, the manager can reject the form and it will be routed back to the initiator.



Rejected Form:

If the form is rejected and returned to the initiator:

- The initiator can update and reprocess the form
- The initiator can delete the form and start over.



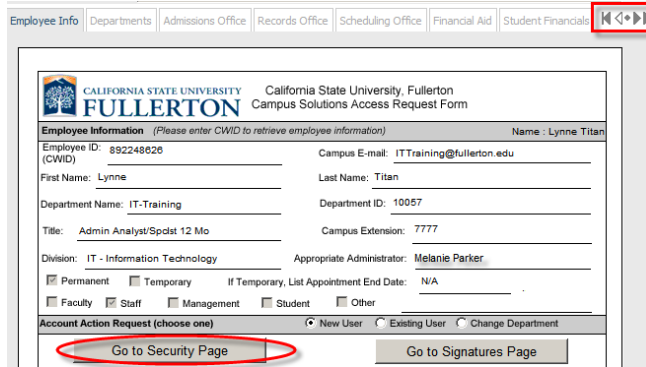
Completing an Office Specific Form

Step 1:

Based upon the employee information, only the appropriate security page may be completed.

Select the **Go to Security Page** button to complete the appropriate tab.

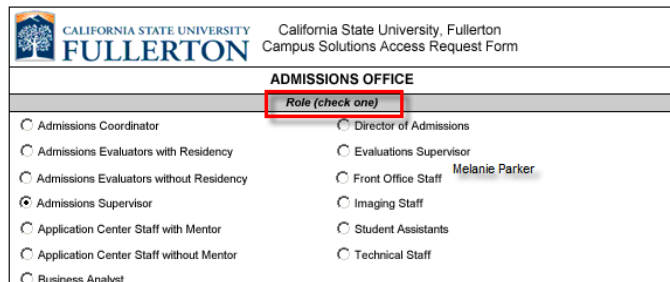
You can also use the button to scroll through the different tabs.



****Admissions Office tab will be used as the example****

Step 2:

Next, identify the appropriate role from the list provided.

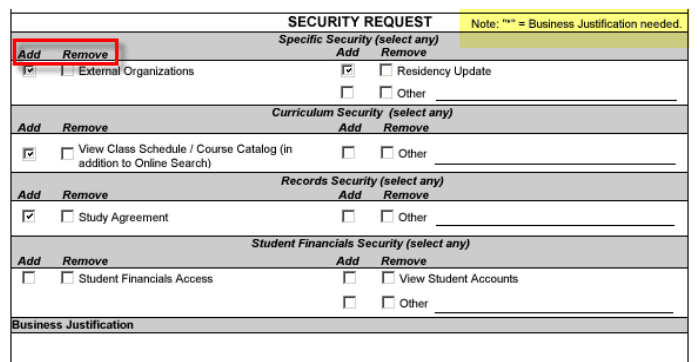


Step 3:

The role specified in Step 2 already determines most security needs for this employee. If additional specific security is needed to be added or removed, use the Security Request portion of the form.

Roles with an * require a business justification.

Enter the justification into the "Business Justification" area for each role requested with an *



If necessary, you can also remove any roles no longer required by choosing the 'remove box' next to the role.

Step 4:

If necessary, add any comments in the "Comment" field at the top of the page. The comment will be saved when the form is Launched and will be viewable on the Employee Info page by everyone who processes this ARF form.

The screenshot shows a web browser window with a toolbar containing 'PDF/Print', 'Launch', and 'Close' buttons. Below the toolbar is a 'Comment:' field with the text 'Employee's role changed from Front Office Staff to Admissions Supervisor'. Below the comment field is a navigation menu with tabs for 'Employee Info', 'Departments', 'Admissions Office', 'Records Office', 'Scheduling Office', 'Financial Aid', and 'Student Financials'. The main content area displays the 'CALIFORNIA STATE UNIVERSITY FULLERTON' logo and the title 'California State University, Fullerton Campus Solutions Access Request Form'. Below the title is a section for 'ADMISSIONS OFFICE' with the name 'Lynne Titan'. Underneath is a 'Role (check one)' section with a list of radio button options: Admissions Coordinator, Admissions Evaluators with Residency, Admissions Evaluators without Residency, Admissions Supervisor (selected), Application Center Staff with Mentor, Application Center Staff without Mentor, Business Analyst, Director of Admissions, Evaluations Supervisor, Front Office Staff, Imaging Staff, Student Assistants, and Technical Staff.

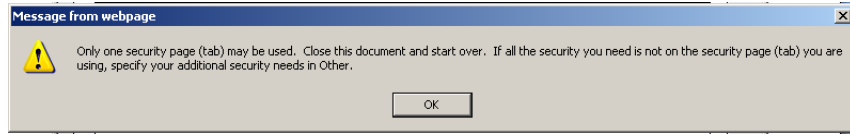
Step 4a:

If more than one page is completed you will receive an error message.

Close the current form and continue by completing a new access request form.



Remember - select the **Go to Security Page** button to complete only the appropriate tab to avoid the error message.



Appropriate Administrator Approval Process

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

<p>Step 1:</p> <p>The appropriate manager receives an email to review the Access Request form electronically.</p>	
<p>Step 2:</p> <p>Log into the campus portal. Enter your campus username and password.</p> <p>Then, click .</p> <p>Next, select the Titan Online tab.</p>	
<p>Step 3:</p> <p>Next, select My Workplace under the eContent section.</p>	
<p>Step 4:</p> <p>Then select 'My Work'.</p> <p>The pending Access Request forms will appear.</p> <p>Choose the appropriate form.</p>	

Step 5:

The access request form appears.

Select the **Go to Security Page** button to review the requested access.

After verifying the requested roles, select the **Go to Signatures Page** button on the Employee Info tab.

Step 6:

Next, either “Approve” or “Reject” the form.


If the request is rejected it will return to the initiator of the form.

Step 7:

Once the response is selected, click the **Complete** button.

Note:

- If the request is rejected it will return to the form initiator.
- If the request is approved the form will move to the next appropriate party for processing.

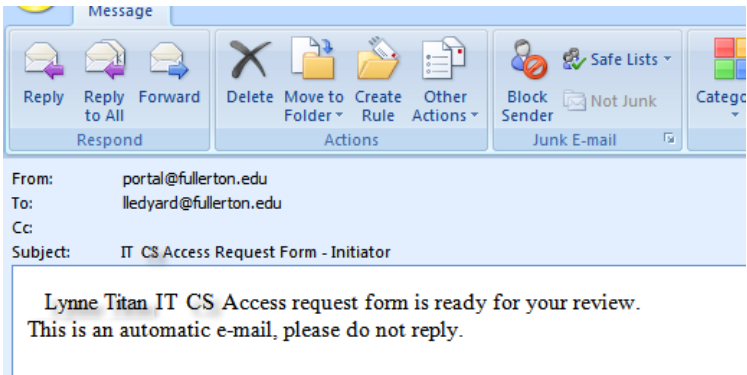



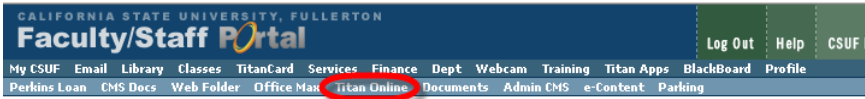
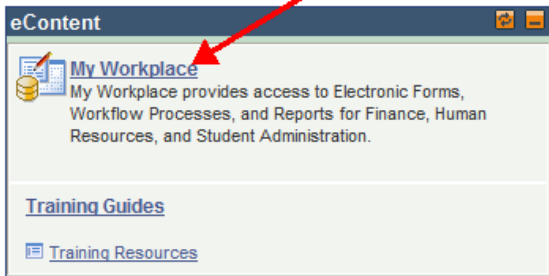
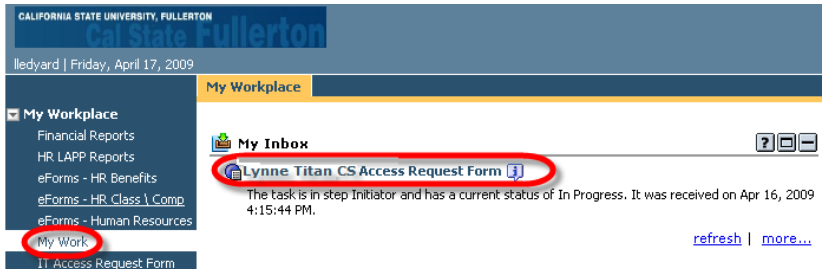
 If the request is approved by the ISO admin office, the manager will be notified via email.

Step 8:

The Access Request form is approved and removed from the list of pending ARF's.

Employee Review

The employee must review and accept the form electronically, regardless of who initiated the Access Request Form (even if it was the employee).

<p>Step 1:</p> <p>Employee receives an email to review the Access Request form electronically.</p>	
<p>Step 2:</p> <p>Log into the campus portal. Enter your campus username and password.</p> <p>Then, click .</p>	
<p>Step 3:</p> <p>Next, select the  tab.</p>	
<p>Step 4:</p> <p>Next, select My Workplace under the eContent section.</p>	
<p>Step 5:</p> <p>Then select 'My Work'.</p> <p>The pending Access Request form will appear.</p> <p>Choose the appropriate form.</p>	

Step 6:

The Access Request form is displayed.

Select the **Go to Security Page** button to review the requested access.

To approve the form, select the **Go to Signatures Page** on the Employee Info tab.



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.

Employee Info | Departments | Admissions Office | Records Office | Scheduling Office | Financial Aid | Student Financials

CALIFORNIA STATE UNIVERSITY FULLERTON
California State University, Fullerton
Campus Solutions Access Request Form

Employee Information (Please enter CWID to retrieve employee information) Name : Lynne Titan

Employee ID: 892248626 Campus E-mail: ITTraining@fullerton.edu
(CWID)

First Name: Lynne Last Name: Titan

Department Name: IT-Training Department ID: 10057

Title: Admin Analyst/Spclst 12 Mo Campus Extension: 7777

Division: IT - Information Technology Appropriate Administrator: Melanie Parker

Permanent Temporary If Temporary, List Appointment End Date: N/A
 Faculty Staff Management Student Other

Account Action Request (choose one) New User Existing User Change Department

Go to Security Page **Go to Signatures Page**

Step 7:

Click the "Access & Compliance Form" button to review the document you probably read and signed when you were hired.

Electronically sign the form by checking the statement "I certify that I have read, understood and agree to follow the Access and Compliance form."

By checking this statement your name and date will auto populate.

If necessary, add any comments into the 'Comment' field.

Records Office | Scheduling Office | Financial Aid | Student Financials | Extended Ed. | International Ed. | Signatures

CALIFORNIA STATE UNIVERSITY FULLERTON
California State University, Fullerton
Campus Solutions Access Request Form

Access & Compliance Form

I certify that I have read, understood and agree to follow the Access and Compliance form.
Employee Name: Lynne Titan Date: 11/6/09

I have reviewed this with my appropriate administrator
Administrator Name: Melissa Paine Date: 11/4/09

Step 8:

Next, either "Accept" or "Reject" the form.

If the request is rejected it will return to the form to your appropriate administrator.

PDF | Complete | Close

* Responses: **< Select a response >**
< Select a response >
Accept
Reject

Comment:


Step 9:

To complete the approval process select the  **Complete** link.

Step 10:

The Access Request form is approved and removed from the list of pending ARF's.

The form is routed to the Business Analysts in the appropriate functional areas where security was requested.

 The Access Request form cannot be changed once approved by the employee. Please contact the ISO security admin Pat Nelson for assistance.

Once access has been granted, the employee will be notified by the ISO administrative office.