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

ARF Data Entry Campus Solutions

Step 1:
Log into the campus portal. Enter your campus username and password. Then, click Login.

Step 2:
Next, select the Titan Online tab.
### Step 3:
Next, select **My Workplace** under the eContent section.

![My Workplace](image)

### Step 4:
Depending upon your access you may see additional forms and reports.

To access the Access Request Form, select the "IT Access Request Form" link.

![Distributed Reports](image)

### Step 5:
Next, select the appropriate form for the required access:
- Campus Solutions Access Request Form

**Prior to accessing the form all popup blockers must be disabled.**
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.

STOP
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.

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.
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 Details.

Step 6c:
The job details will be displayed.
Select OK to return to the position selection screen.
When the correct position has been identified, select the position and click OK to continue.

Step 7:
Next, identify the action request:
- 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.

<table>
<thead>
<tr>
<th>Tab Name</th>
<th>Who uses this tab</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admissions Office</td>
<td>Used solely for Admissions Office employees</td>
</tr>
<tr>
<td>Records Office</td>
<td>Used solely for Student Records Office employees</td>
</tr>
<tr>
<td>Scheduling Office</td>
<td>Used solely for Scheduling Office employees</td>
</tr>
<tr>
<td>Financial Aid</td>
<td>Used solely for Financial Aid Office employees</td>
</tr>
<tr>
<td>Student Financials</td>
<td>Used solely for Student Financials employees</td>
</tr>
<tr>
<td>Extended Education</td>
<td>Used solely for Extended Education employees</td>
</tr>
<tr>
<td>International Ed</td>
<td>Used solely for International Education employees</td>
</tr>
</tbody>
</table>
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.

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.
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.

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.
<table>
<thead>
<tr>
<th>Rejected Form:</th>
</tr>
</thead>
<tbody>
<tr>
<td>If the form is rejected and returned to the initiator:</td>
</tr>
<tr>
<td>- The initiator can update and reprocess the form</td>
</tr>
<tr>
<td>- The initiator can delete the form and start over.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Completing an Office Specific Form</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1:</strong></td>
</tr>
<tr>
<td>Based upon the employee information, only the appropriate security page may be completed.</td>
</tr>
<tr>
<td>Select the Go to Security Page button to complete the appropriate tab.</td>
</tr>
<tr>
<td>You can also use the button to scroll through the different tabs. <strong>Admissions Office tab will be used as the example</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 2:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Next, identify the appropriate role from the list provided.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 3:</th>
</tr>
</thead>
<tbody>
<tr>
<td>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.</td>
</tr>
<tr>
<td>Roles with an * require a business justification. Enter the justification into the “Business Justification” area for each role requested with an *</td>
</tr>
<tr>
<td>If necessary, you can also remove any roles no longer required by choosing the ‘remove box’ next to the role.</td>
</tr>
</tbody>
</table>
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.

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 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).

<table>
<thead>
<tr>
<th><strong>Step 1:</strong></th>
<th>The appropriate manager receives an email to review the Access Request form electronically.</th>
</tr>
</thead>
</table>
| ![Email Thumbnail] | From: portal@fullerton.edu  
To: Manager, James  
Cc:  
Subject: FW: ITCS Access Request Form - Manager  

Lyne Titan's IT CS Access request form is ready for your review. This is an automatic e-mail, please do not reply. |

| **Step 2:** | Log into the campus portal. Enter your campus username and password.  
Then, click **Login**. |
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>![Portal Logon]</td>
<td>Next, select the <strong>Titan Online</strong> tab.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Step 3:</strong></th>
<th>Next, select <strong>My Workplace</strong> under the eContent section.</th>
</tr>
</thead>
</table>
| ![eContent] | Then select ‘My Work’.  
The pending Access Request forms will appear.  
Choose the appropriate form. |

<table>
<thead>
<tr>
<th><strong>Step 4:</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>![My Workplace]</td>
<td></td>
</tr>
</tbody>
</table>
**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).

<table>
<thead>
<tr>
<th><strong>Step 1:</strong></th>
<th><strong>Step 2:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee receives an email to review the Access Request form electronically.</td>
<td>Log into the <a href="#">campus portal</a>. Enter your campus username and password. Then, click <strong>Login</strong>.</td>
</tr>
</tbody>
</table>

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<table>
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<tr>
<th><strong>Step 5:</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Then select ‘My Work’. The pending Access Request form will appear. Choose the appropriate form.</td>
<td></td>
</tr>
</tbody>
</table>
**Step 6:**

The Access Request form is displayed.

Select the button to review the requested access.

To approve the form, select the 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.

**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.

**Step 8:**

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

If the request is rejected it will return to the form to your appropriate administrator.
**Step 9:**
To complete the approval process select the 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.