



PeopleSoft (ERP) Human Resources 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: 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.

 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.




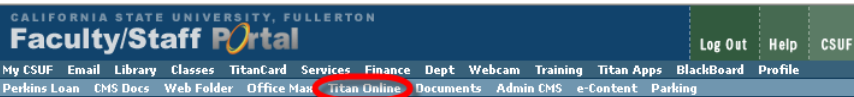


Please use the appropriate browser to successfully access the web based access request form:

- PC – use Internet Explorer
- MAC – use Safari

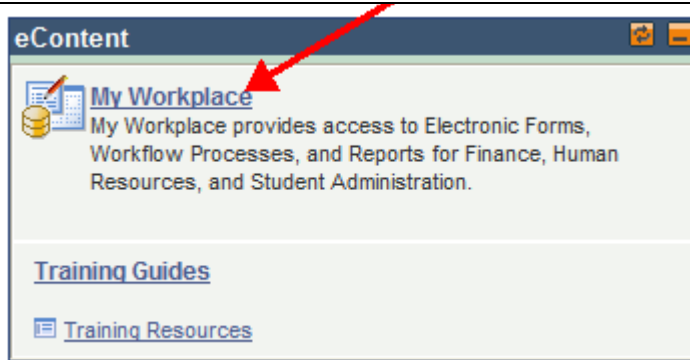
This guide covers:

1. [Access Request Form \(ARF\) Data Entry for Human Resources](#)
2. [Manager Approval Process](#)
3. [Employee Review](#)

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

Step 3:

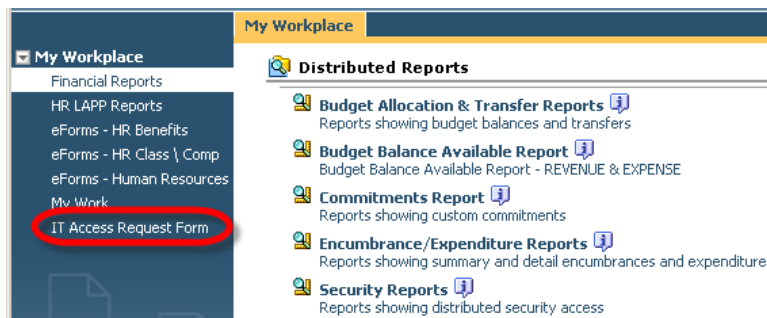
Next, select [My Workplace](#) under the eContent section.



Step 4:

Depending upon your access you may see additional forms and reports.

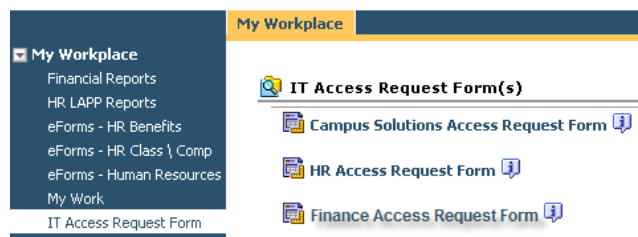
To access the Access Request Form, select the "IT Access Request Form" link.




Step 5:

Next, select the appropriate form for the required access:

- Human Resources (HR)




 **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).

Then, 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.

The  arrow keys are only used in the ERP Campus Solutions Access Request Form.

Step 6a:

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



To continue, select the PDF button and complete the form manually.

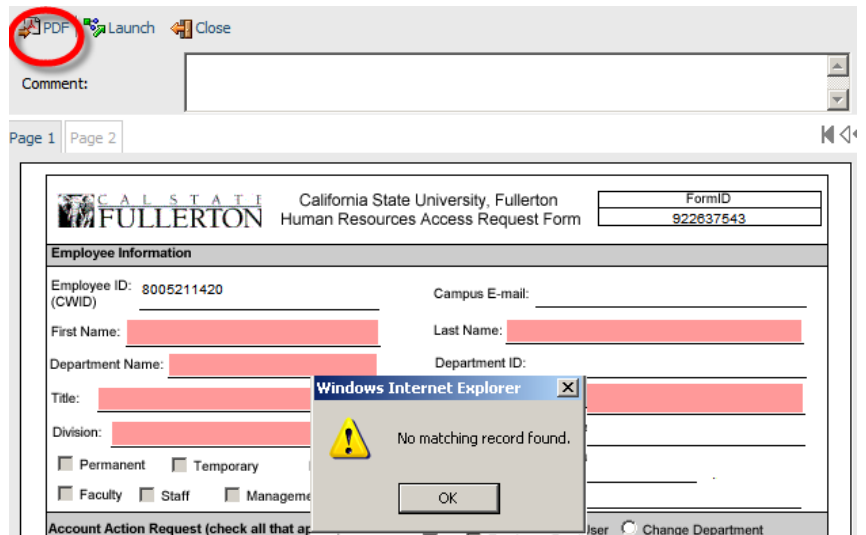
Send the manually completed form to LH-700 Attn: Security.



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



Note: If the form populates with incorrect data, contact Human Resources.



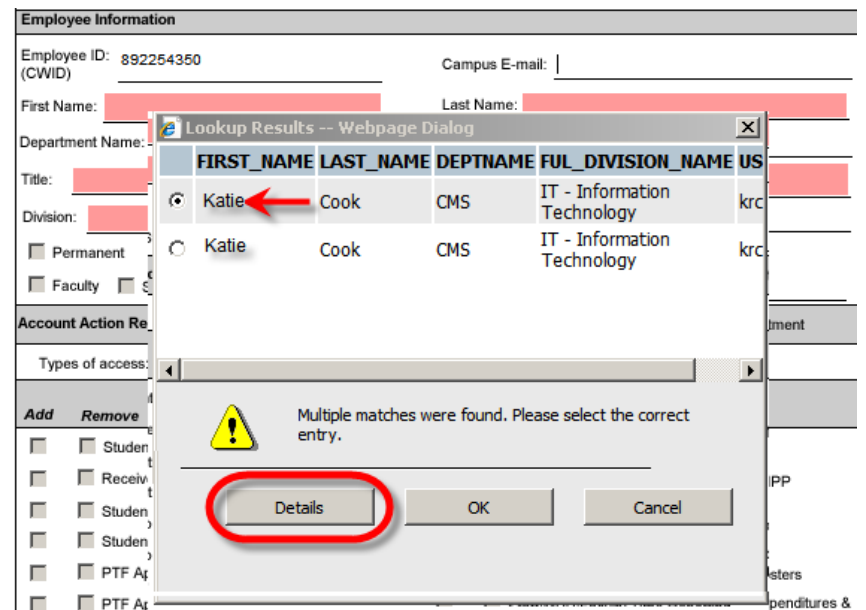
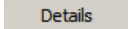
Note - The manual process is required for the following:

- Student employees
- Contractors
- Temporary employees
- Auxiliary
- Etc.

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.

FIRST_NAME	Katie
LAST_NAME	Cook
DEPTNAME	CMS
FUL_DIVISION_NAME	IT - Information Technology
USERID	krcook
PHONE	4549
EMAIL	katiec@fullerton.edu
DESCR	Special Consultant
DEPTID	10057
FUL_DIVISION	10141
POSITION	Other

	FIRST_NAME	LAST_NAME	DEPTNAME	FUL_DIVISION_NAME	US
<input checked="" type="radio"/>	Katie	Cook	CMS	IT - Information Technology	kr
<input type="radio"/>	Katie	Cook	CMS	IT - Information Technology	kr

Multiple matches were found. Please select the correct entry.

Step 7:

Next, identify the action request:

- New User
- Existing User
- Change Department

Then, select the type of access:

- Distributed User
- Central User

California State University, Fullerton
Human Resources Access Request Form

FormID: 922637543

Employee Information

Employee ID: 892248828 (CWID) Campus E-mail: ttitan@fullerton.edu

First Name: Tuffy Last Name: Titan

Department Name: CMS Department ID: 10057

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

Division: IT - Information Technology Appropriate Administrator: Mark Smith

Permanent Temporary If Temporary, List Appointment End Date: 12/31/2008

Faculty Staff Management Student Other

Account Action Request (check all that apply)

New User Existing User Change Department

Types of access: Distributed User Central User

Central Users are employees that work in departments such as: Payroll, HR, Budget Operations, Accounts Payable, Admissions & Records, etc.

Step 8:

Based upon the type of access selected, the appropriate columns become available.

Select the 'add' box next to each role needed.

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

California State University, Fullerton
Human Resources Access Request Form

FormID: 922837543

Employee Information

Employee ID: 892248626 (CWID) Campus E-mail: ttitan@fullerton.edu
First Name: Tuffy Last Name: Titan
Department Name: CMS Department ID: 10057
Title: Admin Analyst/Spclst 12 Mo Campus Extension: 7777
Division: IT - Information Technology Appropriate Administrator: Mark Smith

Permanent Temporary If Temporary, List Appointment End Date: 12/31/2008
 Faculty Staff Management Student Other

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

Types of access: Distributed User Central User

Human Resources Distributed Roles

Add	Remove	Add	Remove
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Step 9:

Next, identify the Department IDs being requested.

DeptID(s) or nodes to which user is requesting access

Select

Step 10:

Only the Department IDs for the identified division are listed.

Choose the appropriate departments and select **OK**.


Employee ID: 892248626 (CWID)
First Name: Tuffy
Department Name: CMS
Title: Admin Analyst/Spclst 12 Mo
Division: IT - Information Technology
 Permanent Temporary
 Faculty Staff Management

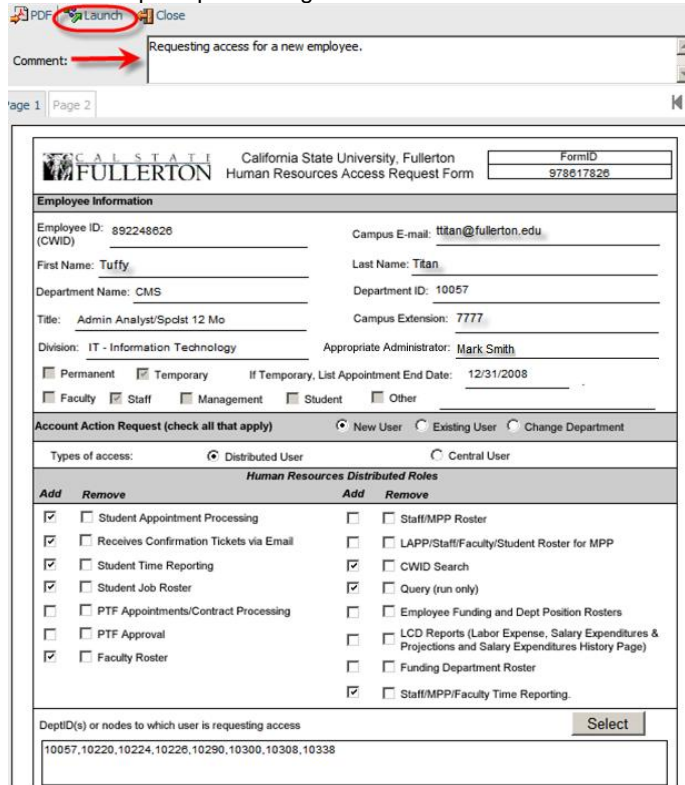
Department List - Windows Internet Explorer


Department ID	Department Name
<input type="checkbox"/> 10008	IT - Administration
<input type="checkbox"/> 10009	IT - Administrative Computing
<input type="checkbox"/> 10056	IT-Academic Technology
<input type="checkbox"/> 10057	CMS
<input type="checkbox"/> 10084	IT - Desktop Computing
<input type="checkbox"/> 10338	IT - Instructional Support-NP
<input type="checkbox"/> 10351	IT-Enterprise Resource Plannin
<input type="checkbox"/> 10352	IT-Rollout
<input type="checkbox"/> 10353	IT-Applications Services
<input type="checkbox"/> 10354	IT-User Services
<input type="checkbox"/> 10356	IT-Training

OK Close

Step 11:

If necessary, add any comments in the 'Comment' field.
Then, select the  Launch link to complete processing of the form.



PDF  Close

Comment: Requesting access for a new employee.

Page 1 Page 2

CALIFORNIA STATE UNIVERSITY FULLERTON California State University, Fullerton
Human Resources Access Request Form FormID: 978617826

Employee Information

Employee ID: 892248626 (CWID) Campus E-mail: ttitan@fullerton.edu
First Name: Tuffy Last Name: Titan
Department Name: CMS Department ID: 10057
Title: Admin Analyst/Spclst 12 Mo Campus Extension: 7777
Division: IT - Information Technology Appropriate Administrator: Mark Smith
 Permanent Temporary If Temporary, List Appointment End Date: 12/31/2008
 Faculty Staff Management Student Other

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

Types of access: Distributed User Central User

Human Resources Distributed Roles


Add	Remove	Add	Remove
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input checked="" type="checkbox"/>	<input type="checkbox"/>

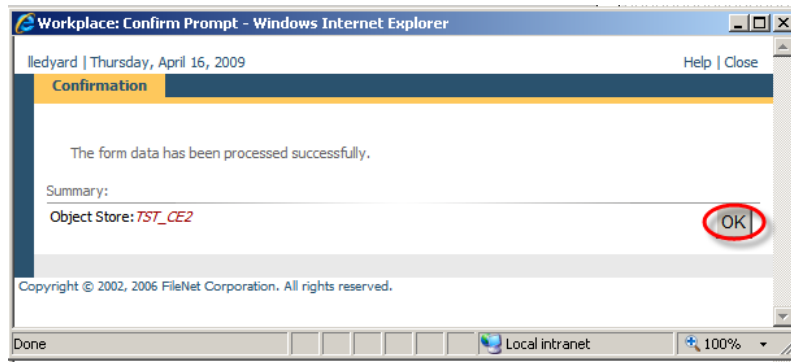
DeptID(s) or nodes to which user is requesting access
10057,10220,10224,10226,10290,10300,10308,10338

Step 12:

The form is now complete.

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

 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.




Workplace: Confirm Prompt - Windows Internet Explorer

lledyard | Thursday, April 16, 2009 Help | Close

Confirmation

The form data has been processed successfully.

Summary:
Object Store: TST_CE2 

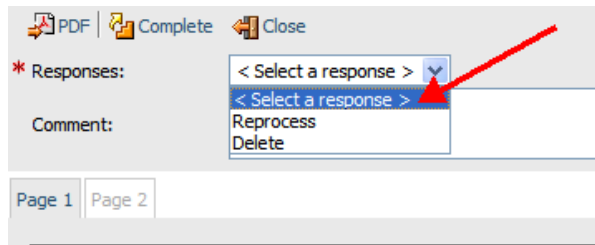
Copyright © 2002, 2006 FileNet Corporation. All rights reserved.

Done Local intranet 100%

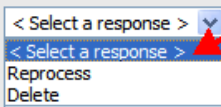
Rejected Form:

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.



PDF Complete Close

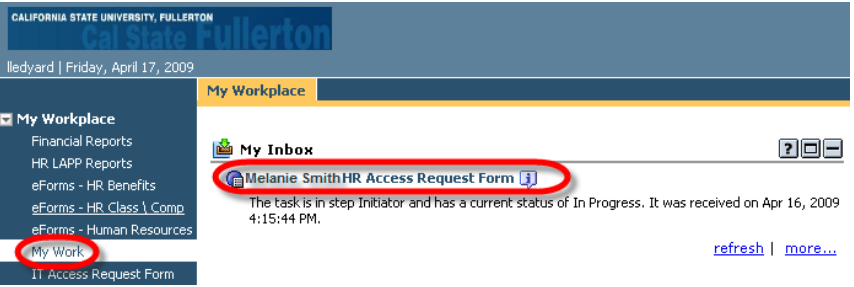
* Responses: 

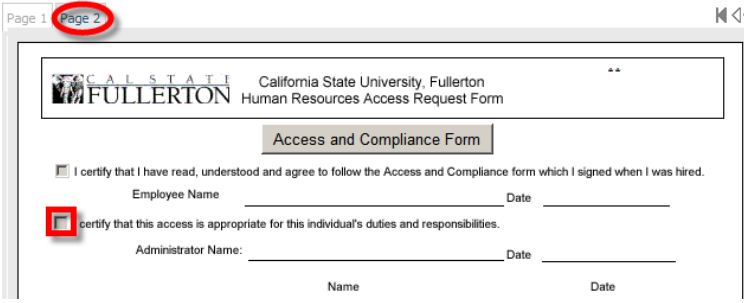



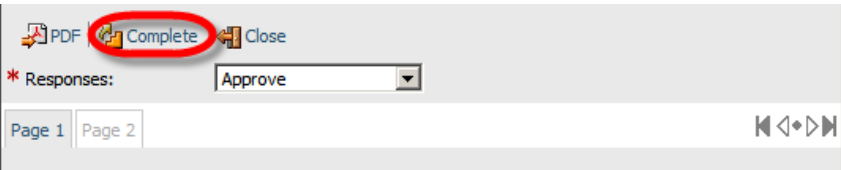
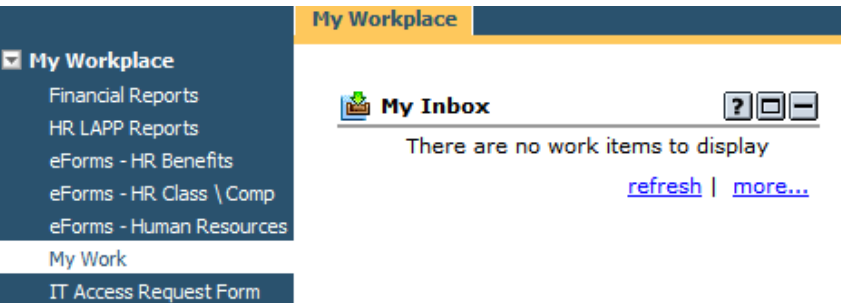
Comment:

Page 1 Page 2

Manager Approval Process

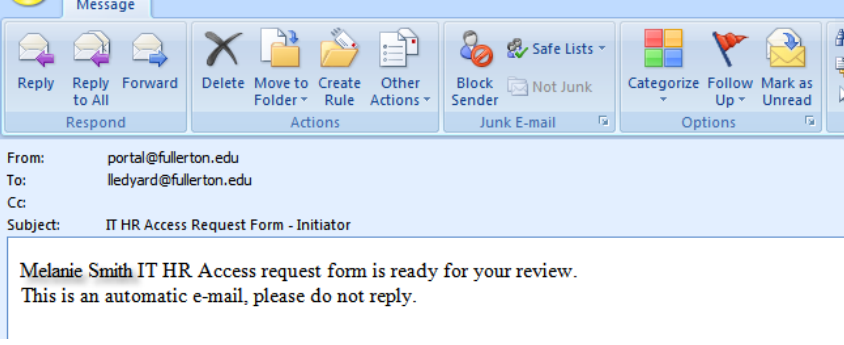

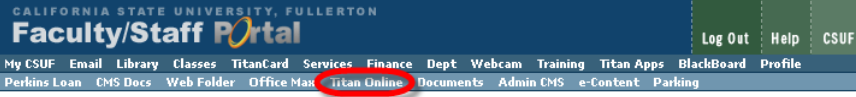
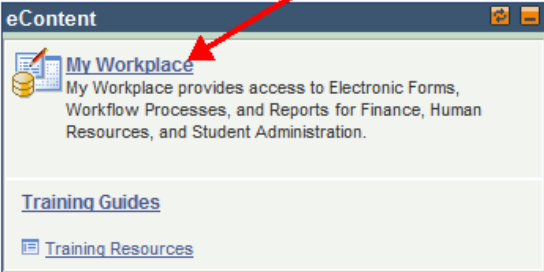
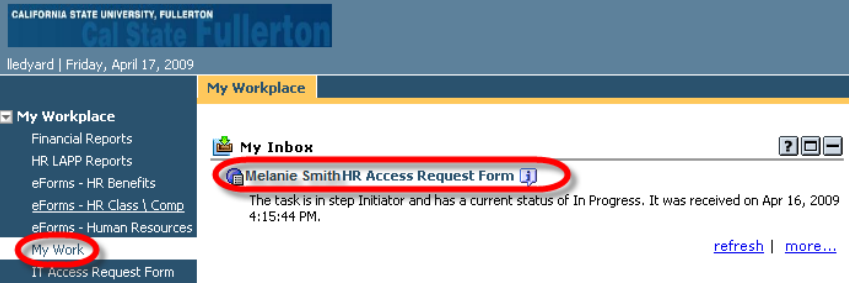
Once a form is complete the appropriate manager is notified via email to review the Access Request Form (ARF).

<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  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 Requests form will appear.</p> <p>Choose the appropriate form.</p>	

<p>Step 5:</p> <p>Review the access request form.</p> <p>Select Page 2 and certify the access is appropriate.</p>	
<p>Step 6:</p> <p>Next, either “Approve” or “Reject” the form.</p> <p>If the request is rejected it will return to the form initiator.</p>	
<p>Step 7:</p> <p>Once the response is selected, click the  Complete button.</p> <p>Note:</p> <ul style="list-style-type: none"> - 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. <p> If the request is approved by the ISO admin office, the manager will be notified via email.</p>	
<p>Step 8:</p> <p>The Access Request form is approved and removed from the list of pending ARF's.</p>	

Employee Review

If the Access Request form is initiated by someone other than the employee, the employee must review and accept the form electronically.

<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 Login.</p>	
<p>Step 3:</p> <p>Next, select the Titan Online 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 Requests form will appear.</p> <p>Choose the appropriate form.</p>	

Step 6:

The Access Request form is displayed.

Review the fields on the page for accuracy.

To approve the form, select page 2.



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.

California State University, Fullerton
Human Resources Access Request Form
FormID: 978617826

Employee Information

Employee ID: 892248626 Campus E-mail: msmith@fullerton.edu
First Name: Melanie Last Name: Smith
Department Name: CMS Department ID: 10057
Title: Admin Analyst/Spdst 12 Mo Campus Extension: 7650
Division: IT - Information Technology Appropriate Administrator: Mark Smith

Permanent Temporary If Temporary, List Appointment End Date: 12/31/2008
 Faculty Staff Management Student Other

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

Types of access: Distributed User Central User

Human Resources Distributed Roles

Add	Remove	Add	Remove
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

DeptID(s) or nodes to which user is requesting access
10057,10220,10224,10226,10290,10300,10308,10338

Human Resources Core/Central Roles

Add	Remove
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

Step 7:

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

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

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

* Responses: < Select a response >

Comment:



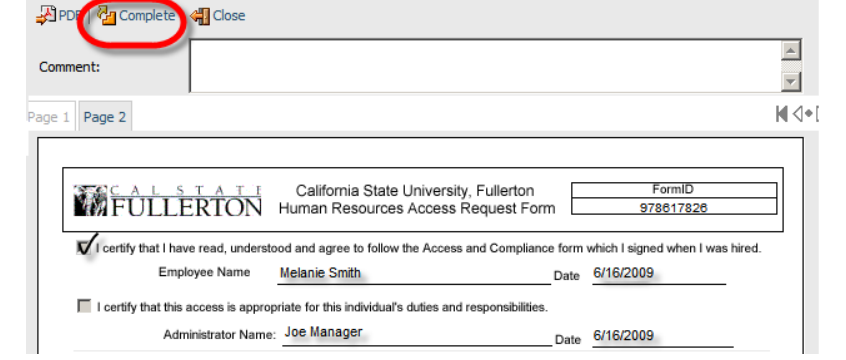

Page 1 Page 2

California State University, Fullerton
Human Resources Access Request Form
10013

Access and Compliance Form

I certify that I have read, understood and agree to follow the Access and Compliance form which I signed when I was hired.
Employee Name: Melanie Smith Date: 06/16/2009

I certify that this access is appropriate for this individual's duties and responsibilities.
Administrator Name: Joe Manager Date: 06/16/2009

<p>Step 8:</p> <p>Next, either “Accept” or “Reject” the form.</p> <p>If the request is rejected it will return to the form to your appropriate administrator.</p>	
<p>Step 9:</p> <p>To complete the approval process select the  Complete link.</p>	
<p>Step 10:</p> <p>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>	