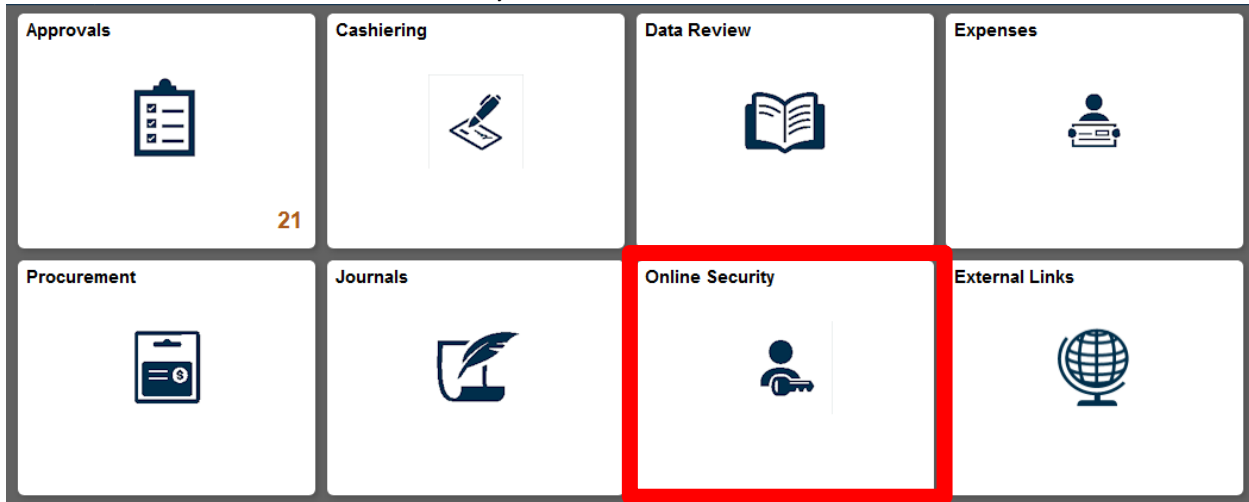
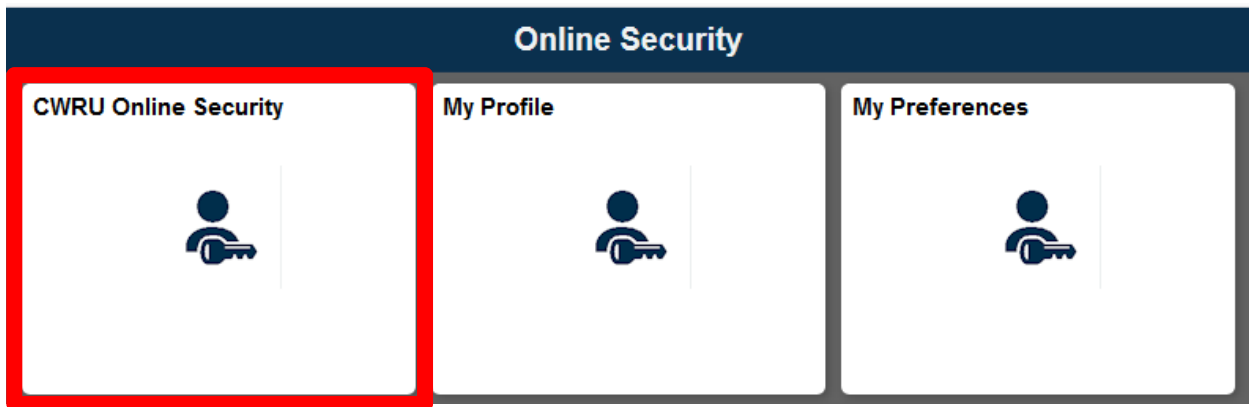


# Procedure

- Log in to PeopleSoft Financials to get started.
- Select the Online Security Form tile



- Select the Online Security Form tile



- Enter the **Case Network ID** of the person requesting access in the Case Network ID field.
- Press the **Enter** key

- New Security Requests
- Review/Approve Requests
- Confidentiality Agreement

New Requests

Please enter a Network ID (in lower case) and then hit the Enter Key:

Case Network ID:

- The name of the of person appears. Verify this is the correct person
- If the person had a prior security request, information about the request(s) will appear below the name along with the buttons to change or inactivate the existing security.
- Click Add User Profile button.
- If a person has access that needs to be changed or updated, click Change User Profile button.

New Requests | **Security Access Request** | Reporting Access Request | Authorizations / Training

### Online Security Access Request Form

Version Number: 1

Case Network ID: dgm75      Name: Moore,Deonna

Requestor ID: dgm75      Requestor Name: Moore,Deonna

Employee ID:      Request Status: Form Pend

\*Phone Number:       \*Fax Number:

\*Building:

\*Room#:

\*Department ID:

Management Center:

**Supervisor**

\*Network ID:

Name:

**Purchasing/eProcurement**

Submit Requisitions       No Approval on Requisitions

Inquire on Requisitions/Purchase Orders       Approve Requisitions - \$0 - \$5,000

Requisition Approver's Case Network ID:

Approve Requisitions -\$5,000 - \$20,000

Requisition Approver (Name):

Approve Requisitions - greater than \$20,000

**Accounts Payable**

Submit Payment Requests

Inquire on Vouchers/Payment

**General Ledger**

Enter Journals

Department Deposits

**Miscellaneous**

Petty Cash

Travel & Expense

Reporting Access Request

On the Online Security Access Request Form located in the Security Access Request tab, enter the phone number of the person requesting access in the Phone Number field. Make sure to include 10- digits in this format: xxx/xxx-xxxx. Also complete the Fax Number, Building, Room #, Department ID and Supervisor Network ID fields. You can search for building information by clicking the Look Up button.

The following information is pre-populated:

Case Network ID: CWRU Network ID of the person for whom the form is being completed

Name: Name of the person for whom the form being completed

Requestor ID: The CWRU Network ID of the person completing the request  
 Requestor Name: The name of the person completing the request

Employee ID: Employee ID of the person for whom the form is being completed

Request Status: Status of the request

### Online Security Access Request Form

Version Number: 1	Name: Moore, Deonna
Case Network ID: dgm75	Requestor Name: Moore, Deonna
Requestor ID: dgm75	Request Status: Form Pend
Employee ID:	*Fax Number: 216/368-0000
*Phone Number: 216/368-4500	
*Building: 4B30 <input type="button" value="Look Up"/> Crawford Hall	
*Room#: 409	
*Department ID: 231242 ITS Run	
Management Center: UGN University General	

**Supervisor**

\*Network ID: jx066

Name: Li, Jing

**Purchasing/eProcurement**

Submit Requisitions
  Inquire on Requisitions/Purchase Orders
  No Approval on Requisitions
  Approve Requisitions - \$0 - \$5,000
  Approve Requisitions - \$5,000 - \$20,000
  Approve Requisitions - greater than \$20,000

Requisition Approver's Case Network ID: jxxw301

Requisition Approver (Name):

<p><b>Accounts Payable</b></p> <p> <input checked="" type="checkbox"/> Submit Payment Requests  <input checked="" type="checkbox"/> Inquire on Vouchers/Payment                 </p>	<p><b>General Ledger</b></p> <p> <input checked="" type="checkbox"/> Enter Journals  <input checked="" type="checkbox"/> Department Deposits                 </p>	<p><b>Miscellaneous</b></p> <p> <input checked="" type="checkbox"/> Petty Cash  <input checked="" type="checkbox"/> Travel &amp; Expense                 </p>
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Select the items that requires access to use. Make sure to enter the Requisition Approver's Case Network ID in the field provided. The requisition approver must have a higher level of approval authority.

## **APPROVAL AUTHORITY KEY**

### **Purchasing / eProcurement**

**Submit Requisitions:** Authority to submit Purchase Requisitions

**Inquire on Requisitions/Purchase Orders:** Authority to view Purchase Requisitions that were entered by themselves or by others

**Requisition Approver's Case Network ID:** If applicable, enter the name of the person that will approve requisitions after they have been entered. (Please note that all requisitions exceeding your approval authority will be routed to this person first.)

**Requisition Approver (Name):** This will populate after the Network ID is entered.

**No Approval on Requisitions:** Authority to create requisitions but cannot approve them.

Approve Requisitions - \$0 - \$5,000: Authority to approve Requisitions up to \$5000. Approve Requisitions - \$5,000 - \$20,000: Authority to approve Requisitions up to \$20,000. Accounts Payable Section

**Submit Payment Requests:** Authority to submit Payment Requests.

**Inquire on Vouchers/Payment:** This person can view Payment Request and Vouchers that were entered by them or by other users, please check this box. If not, leave it blank.

### **General Ledger Section**

**Enter Journals:** Authority to enter Financial Journals either online or through the Spreadsheet Upload interface.

**Department Deposits:** This access is given by default to all PeopleSoft Financials users. It is automatically checked.

### **Petty Cash Section**

**Petty Cash:** Authority to enter Petty Cash Vouchers.

### **Travel and Expense Section**

**T & E Option:** Authority to enter Travel and Expense related requests. Click Reporting Access Request Button.

Click **Reporting Access Request** Button.

New Requests | Security Access Request | **Reporting Access Request** | Authorizations / Training

### Online Security Reporting Access

Version Number 1

Case Network ID dgm75 Moore, Deonna

**Department Row Level Security** Personalize | Find | First 1 of 1 Last

Department	Description	Dept Rollup	All Projects	RES	OSA	TRN	SPC	END	CIP	AGY
1		<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"/>

**Project Row Level Security** Personalize | Find | First 1 of 1 Last

*Selected Project	Description	Department
1		

Preview Row Level Access

Submit

Security Access Request

Once the Security Reporting Access has completed all stages the approval process, Peoplesoft will need to process the request. Those requests are processed nightly Monday to Friday. Access will be available in the PeopleSoft Financials reporting system the next business day.

Authorizations

On the Reporting Access Request tab, enter the 6 digit Department number for access to be given in the Department field. In addition, select the check boxes of the additional items to narrow or expand access rights.

\*\*\* Please Note \*\*\*If no access to Financials Reporting is requested, this section can be left blank. It is not required to fill out the Reporting Access Request to complete the security form.

### DEPARTMENT ROW LEVEL SECURITY

Department: The 6 digit department ID

Dept Rollup: Department rollup allows access to all Departments that roll up to the Department entered.

All Projects: All projects associated with the primary department and rollup departments if applicable.

RES: Research Speedtypes (must be associated with the Department selected).

OSA: Other Sponsored Activity Speedtypes

TRN: Training Speedtypes

SPC: Special Projects Speedtypes

END: Endowment Speedtypes

CIP: Construction in Progress Speedtypes

AGY: Agency Speedtypes (must be associated with the department selected)

For narrower Row Level Security, enter the Selected Project Speedtypes in the Project Row Level Security section.

### Project Row Level Security

Specify a list of projects. The list will be limited to the projects which reside in the department(s) you have specified in the department Row Level Security.

To preview the access that will be granted, click the Preview Row Level Access button.

### Preview Row Level Access

Case Network ID dgm75

Version Number 1

SpeedType Key  Search  Rows: 1 to 300 

Row No.	Department	SpeedType/Project	Description
1	200000	ADV129900	Advances - Prudential
2	200000	ADV129950	Advances - Triangle Res LLC
3	200000	AEXP11216	CASE: CrossOver Sync
4	200000	AEXP11217	Visiting Scholars Program
5	200000	AEXP11820	ACCR TAX-OHIO SALES
6	200000	AEXP11825	DISCOUNT OHIO SALES TAX
7	200000	AEXP18130	PPD EXP-LEGAL
8	200000	AEXP18131	Accr Exp - Employ & Severance
9	200000	AGY000000	Agency Control
10	200000	AGY810010	Y/E Debit Balances
11	200000	AGY810400	Deferred Comp #7
12	200000	AGY810490	African Amer Faculty/Staff Org
13	200000	AGY811460	Deferred Comp #3
14	200000	AGY820000	Soc. of Res Admin Conference
15	200000	AGY820001	BioEnterprise
16	200000	AGY820310	UCRC
17	200000	AGY823000	UCRC Corp
18	200000	AGY823200	R Brown/UT1
19	200000	AGY824030	Women's Faculty Assoc
20	200000	AGY827270	Am Assoc Of Univ Prof
21	200000	AGY829300	Medical Center Co
22	200000	AGY830010	Deferred Comp #3
23	200000	AGY830030	Def Comp #3-Payments
24	200000	AGY830040	Deferred Comp #5

Review for accuracy the results and then click the Back button to return. To finish the form, click the Submit button.

\*\*\* Please Note \*\*\* The user for which access is being requested, the supervisor and management center will all receive email notification that a request has been submitted. Email communications will follow as the form follows workflow. The end user will receive e-mail notification when the form has been approved and training completed.

After receiving message that request has been submitted, click the OK button.