

Affiliate Initiated Security Request Form

Before initiating an ePASS security request form:

- Ensure the [FERPA training](#) has been completed. A security request form cannot be initiated for an individual who has not completed of the FERPA Exam.
- Read the [NAU Data Access Policy](#)
- Find the correct role(s) to be requested or revoked
 - To view LOUIE and HCM role descriptions go to the [LOUIE Reference Sheet](#)
 - To view PS Financials role descriptions go to the [PS Financials Reference Sheet](#)
- Only one security form can be processed at a time. However multiple roles can be specified on the form.

Note: All the roles on a form move through the system together. If you have one role that is held up, all the roles on that request will be delayed.

Initiate a Security Request Form:

Log into LOUIE and select the HR Home Page, click on the Employee eForms Tile.



On the ePASS Home Page, Select – ‘Initiate a Security Request Form’

If FERPA has been completed and there are no other security request forms in progress, the security request form will display with your information (User ID, Name, Email Address, Affiliate department, etc.).

Step 1 of 3: Add Role Security

User Info

User ID: jd12 Doe, Jane E
 Email: Jane.Doe@nau.edu [NAU Data Access Policy](#)
[Instructions for Requesting Administrative Access to LOUIE, HR and PS Financials.](#)

Form Data

FERPA Completed 04/04/2003 [FERPA Tutorial](#)
 eForm ID: 68013

Affiliate						
Selected	Affiliation	Sponsor Dept	Department Name	Sponsor Name	Sponsor Position	
1 <input checked="" type="checkbox"/>	Cline Library	11600	Cline Library	Doe, Joseph F	Dean & University Librarian	

Affiliate Selected: This should display the affiliation type, department and sponsor information of the NAU department that you are associated with. The Sponsor is the next approval on the security request form. *If this information is incorrect, do not proceed and contact the Affiliate Management Office 928-523-0921.*

Please explain your specific job duties that require the data access for each role being requested. Explanations such as "per my job duties," "to help students," "same as person in position before me," or copying the role description are NOT sufficient.

Data Access Need

Data Access Need: This section is filled in by the initiator of the form to explain the need for the security being requested. Please describe specific job responsibilities that require the type of access. If an approver feels there is not enough justification for the roles being requested, the form may be recycled to the initiator asking for an update. This will delay the processing of the form.

Time Entry/Leave Usage Entry:

I need to enter and approve time for hourly employees.

Time Reporting Departments		Personalize	Find	View All	First	1 of 1	Last
Department	Description	Approve Time	Enter Time				
1 30330 <input type="text"/>	Student Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				<input type="button" value="+"/> <input type="button" value="-"/>

I need to enter leave usage information for employees.

Leave Reporting Departments		Personalize	Find	View All	First	1 of 1	Last
Department	Description						
1 30330 <input type="text"/>	Student Accounts						<input type="button" value="+"/> <input type="button" value="-"/>

If you need to enter and approve time or enter leave for employees check the appropriate boxes.

Department: This field will display to enter the departments you will need access for. The magnifying glass next to the department field can be used to look up the department by description.

Note: Multiple departments can be added by using the '+' button.

Security Roles:

The screenshot shows a web interface for requesting security roles. It is divided into two main sections: "Request Security" and "Currently Assigned Administrative Security".

Request Security: This section has a header with "Personalize | Find | [grid icon] | First 1 of 1 Last". Below the header is a table with one row. The first column contains the number "1". The second column is a text input field with a magnifying glass icon to its right. To the right of the input field are two buttons: a plus sign "+" and a minus sign "-". A red arrow points from the magnifying glass icon to the text input field.

Currently Assigned Administrative Security: This section has a header with "Personalize | Find | [grid icon] | First 1-6 of 6 Last". Below the header is a table with six rows. The first column contains numbers 1 through 6. The second column contains role names: "NAU_AD Adm Recr Standard View", "NAU_AP Inquiry", "NAU_CC Basic Service Provider", "NAU_FA Fin Aid Status View", "NAU_FA MPN Manifest", and "NAU_SF Customer Acct Comments". A red arrow points from the magnifying glass icon in the "Request Security" section to the first row of this table.

Annotations in red text:

- "Enter the name of the role being requested or use the magnifying glass lookup to search." (points to the magnifying glass icon)
- "To add more than one role, use the '+' button" (points to the '+' button)

At the bottom of the form are two buttons: "Next >>" and "Cancel".

Request Roles: Enter the name of the role to be requested in the blank row. To search for a role, use the magnifying glass. To add more than one role to the request, use the '+' to add a row.

Currently Assigned Administrative Security: This will display the security currently assigned. This cannot be changed on a request form.

Next: Click to move forward to the next page.

Cancel: This will wipe out all work done on the form and return to the ePASS Home Page.

File Attachments:



Submit Role Security Form





Step 2 of 3: Submit Form

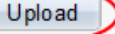
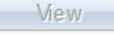


User Info

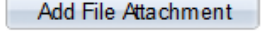
User ID: jd12 Doe, Jane
Email: Jane.Doe@nau.edu
Employee ID: 1234567 [NAU Data Access Policy](#)
 [ePASS Help](#)

Form Messages

	Message Text	Description	
<input checked="" type="checkbox"/>	 Security Affirmation	As the employee requesting this access to a PeopleSoft system, I have read and agreed to abide by the NAU Data Access Policy which describes my responsibilities in the ethical use of the University's data. (See link above)	

File Attachments Personalize | Find | View All |  |  First  1 of 1  Last

Upload	View	Description	Attachment Id	
1 		<input type="text"/>		

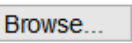




Upload: To upload a document, click the upload button.


A blank field will appear with a 'browse' button. Click on the browse button to access your files and select the correct document. The document name will then appear in the field. Click 'upload' to attach the document. Use the Description drop down box to indicate the type of document you are attaching.

Note: Only the following file types are permitted: DOC, DOCX, GIF, JPEG, JPG, PDF, TIF, TIFF, XLS, XLSX. The file name cannot be any longer than 60 characters.

File Attachment ? Help

C:\Users\kdp27\Desktop\Doc 1.docx 



If necessary, use the 'Add File Attachment' to upload additional files.

Submit the Form:

Submit Role Security Form



Step 2 of 3: Submit Form



User Info

User ID: jd12 Doe, Jane
Email: Jane.Doe@nau.edu
Employee ID: 1234567

[NAU Data Access Policy](#)
[ePASS Help](#)


Form Messages

	Message Text	Description	
<input checked="" type="checkbox"/>	 Security Affirmation	As the employee requesting this access to a PeopleSoft system, I have read and agreed to abide by the NAU Data Access Policy which describes my responsibilities in the ethical use of the University's data. (See link above)	

File Attachments Personalize | Find | View All |   First 1 of 1 Last

Upload	View	Description	Attachment Id	
1 <input type="button" value="Upload"/>	<input type="button" value="View"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Delete"/>

Comments

Your Comment: 

Comment History:

Everyone requesting access to an NAU system must read and abide by the NAU Data Access Policy. To read the policy click on the NAU Data Access Policy link.

Form Messages: All form messages must be acknowledged (check the box) before the form can be submitted.

Comments: Make any comments that may be helpful for any approvers. Be aware that comments become part of the permanent record and cannot be removed.

Submit: Click if the security request is complete and are ready to submit for approval. Once a form has been submitted, it cannot be withdrawn or updated unless recycled by an approver.

Previous: Click to return to the previous page.

Hold: Click if you are not done with the form and would like to come back to it before submitting.

Cancel: This will wipe out all work done on the form and return to the ePASS Home Page.

Submit Role Security Form

Step 3 of 3: Finalize Form

▼ User Info


User ID:	dt534	Tarango, Daniel
Email:	pstest.Daniel.Tarango@nau.edu	
Employee ID	5111913	NAU Data Access Policy ePASS Help

Form Status

eForm ID: 192564


You have just SUBMITTED this form. This action passed the form to Supervisor Level Approver for further processing.

Process Visualizer




1:
Tarango, Daniel
(dt534)

>




2: Supervisor
Level
Approver

>




3: Integration
Broker

>



4: System

>



[Who can work this form?](#)

[Go To Worklist](#)

[View This Form](#)

[Go To ePASS Home Page](#)

Who can work this form: This link will display a pop-up window with the information of the current approver(s).

View This Form: Use this link to view the details of the form in 'read only' mode and to see the approval status of the form

For more information on viewing a security form please see the 'Employee/Affiliate View' training document.

After submitting the request, the following steps will take place:

1. Your Sponsor will receive an email with a link to approve your request.
2. Data steward(s) and/or other reviewers will approve your request.
3. After all approvals are complete the system will automatically assign the security.
4. You and your sponsor will get an email stating that your security has been approved and assigned. You can then use the new security in PeopleSoft.
5. If the request is denied or recycled you will receive an email with a link to update or view your request.