Initiate Security Request Form for Employee/Affiliate

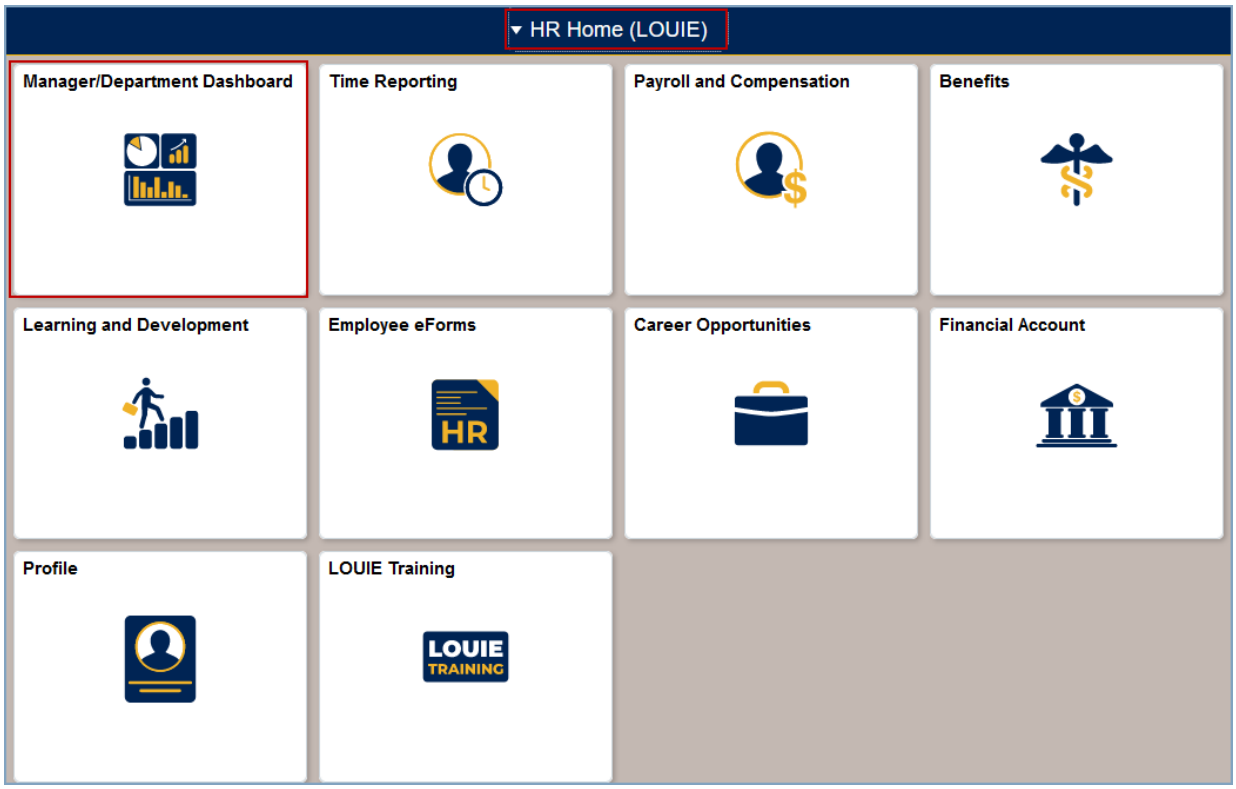
Before initiating an ePASS security request form:

- 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.

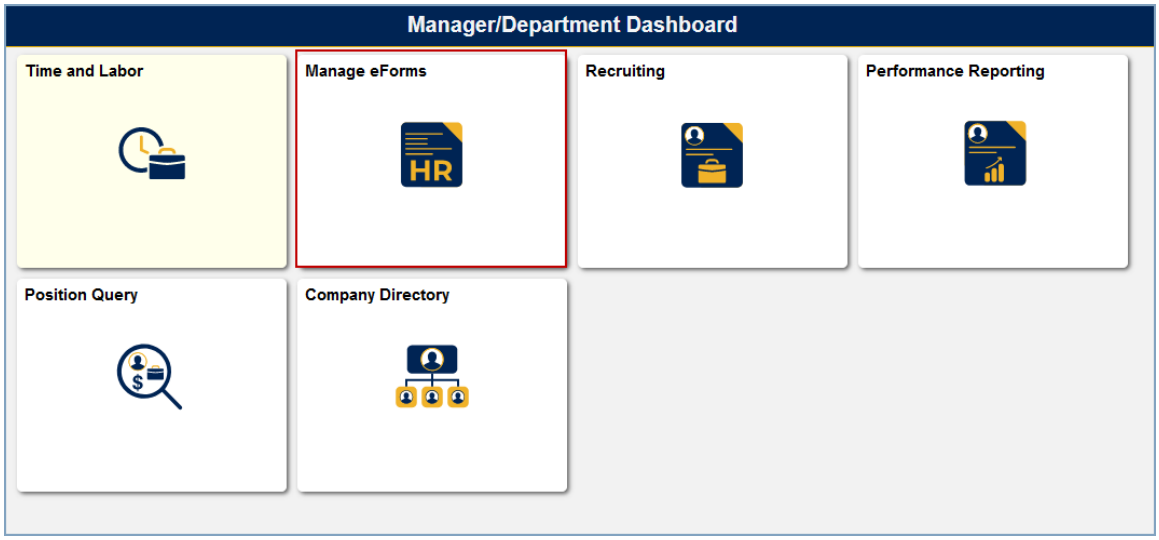
Note: All the roles on a form move through the system together. If you have one role that is held up, all the roles on that request will be delayed.

Initiate a Security Request Form:

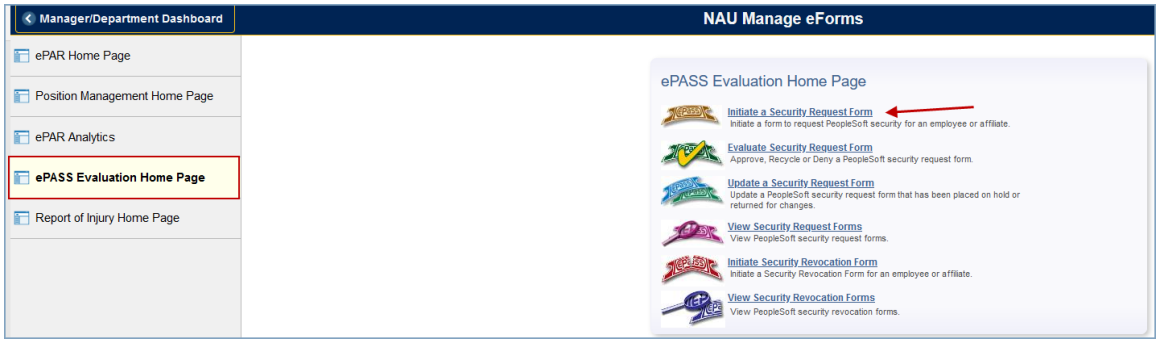
Log into LOUIE and select the HR Home Page, click on the Manager/Department Dashboard.



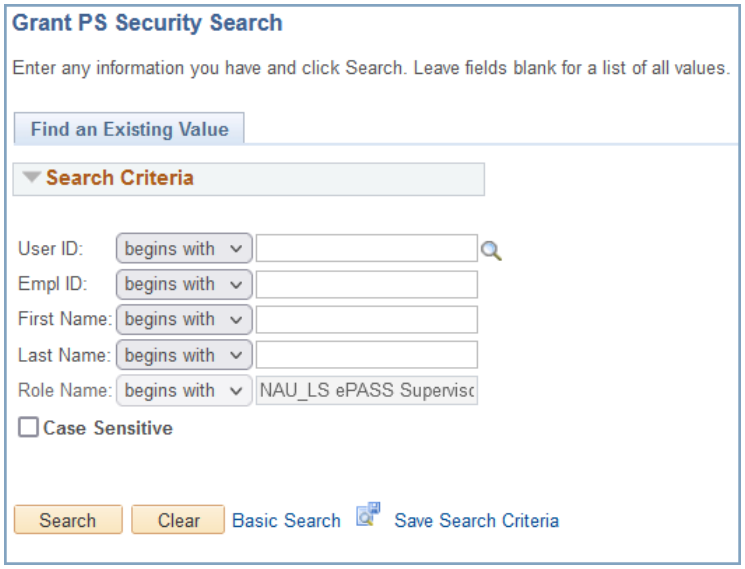
Click on the Manage eForms Tile.



Select ePASS Evaluation Home Page, Select – 'Initiate a Security Request Form'



A search screen will display

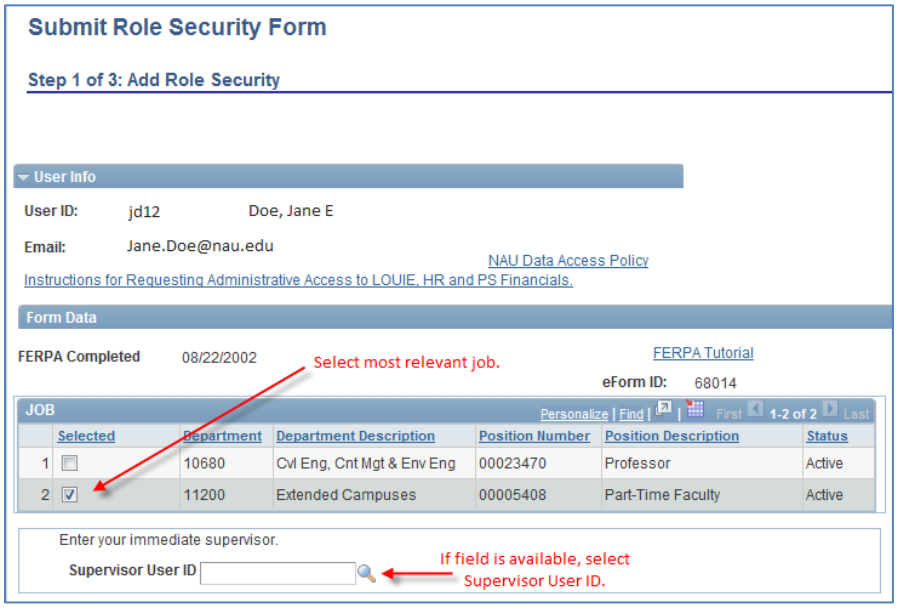


Enter any information about the employee/affiliate that will narrow the search, at least one field is required.

Once you enter information and hit search, a list of all users meeting your search criteria will appear and you can select the one that is appropriate.

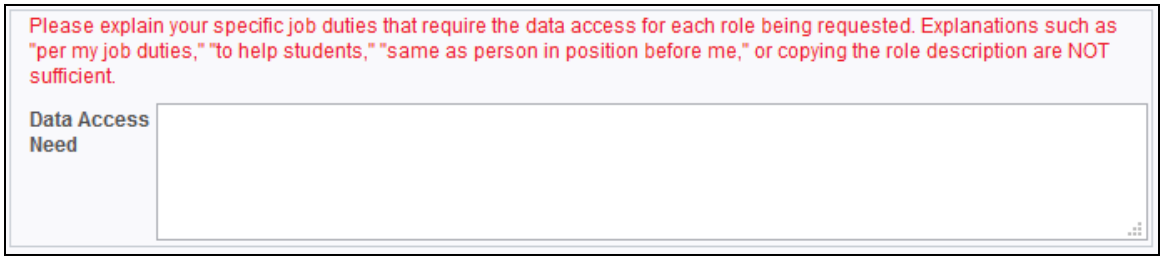
Note: If a user ID does not display it may be because the user has never logged into PeopleSoft or if you are a supervisor, you are not listed as the employee's Reports To.

After selecting the employee or affiliate, you can begin a security request. If FERPA has been completed and there are no other security request forms in progress, the form will display the employee or affiliates basic information (User ID, Name, Email Address, Job information, etc.).



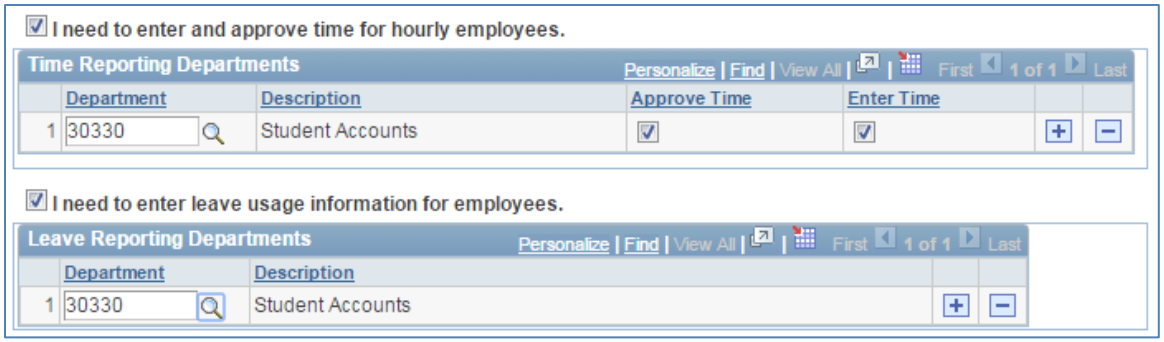
If completing form for an employee:
JOB Selected: Select the most relevant position (job) for this security request.
Supervisor: If the job selected is a pool position, the 'Supervisor' field will become available. Select the User ID of the employee's immediate supervisor. You can also click on the magnifying glass to select the supervisor by first or last name.

If completing form for an affiliate:
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.



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.

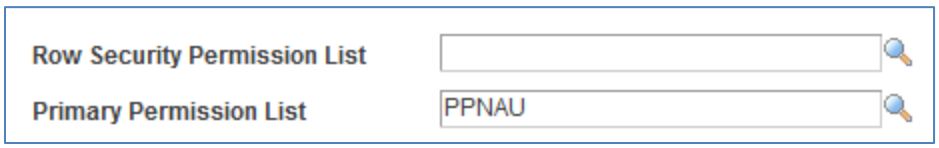
Time Entry/Leave Usage Entry:



If the employee or affiliate needs to enter and approve time or enter leave usage for employees check the appropriate boxes.

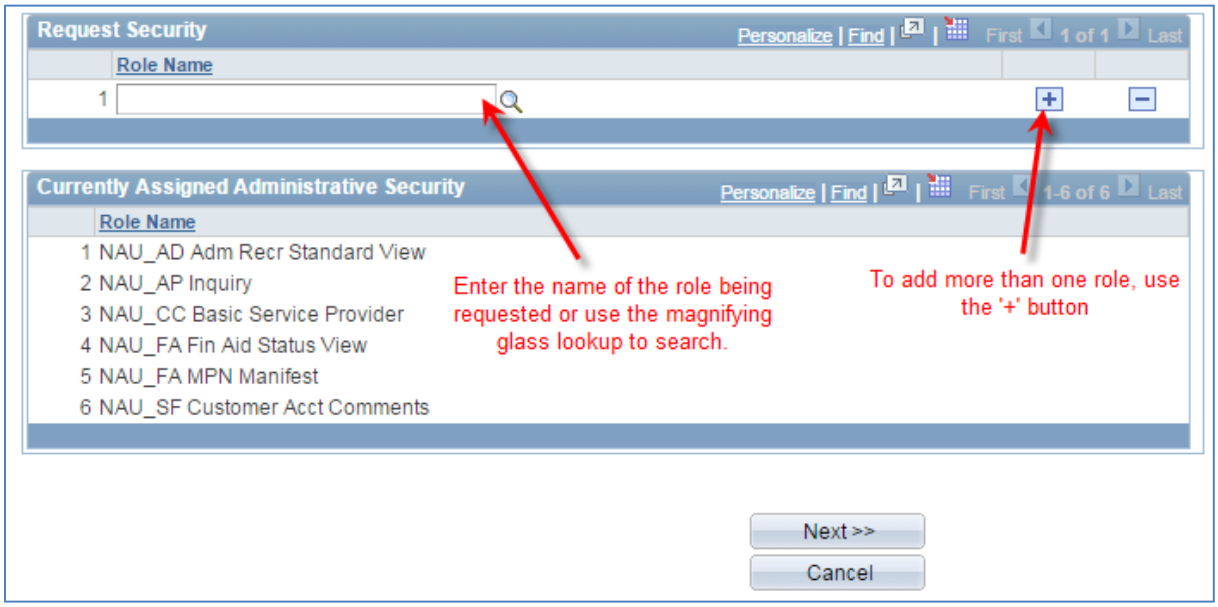
Department: This field will display to enter the departments they will need access for. The magnifying glass next to the department field can be used to look up the department by description.
Note: Multiple departments can be added by using the '+' button.

Row Level Security/Primary Permission List (Data Stewards Only):



Row Security Permission List: If a role being granted requires specific row level, a Data Steward must update this before submitting.
Primary Permission List: If a role being granted requires a specific primary permission list, a Data Steward must update this before submitting.

Security Roles:



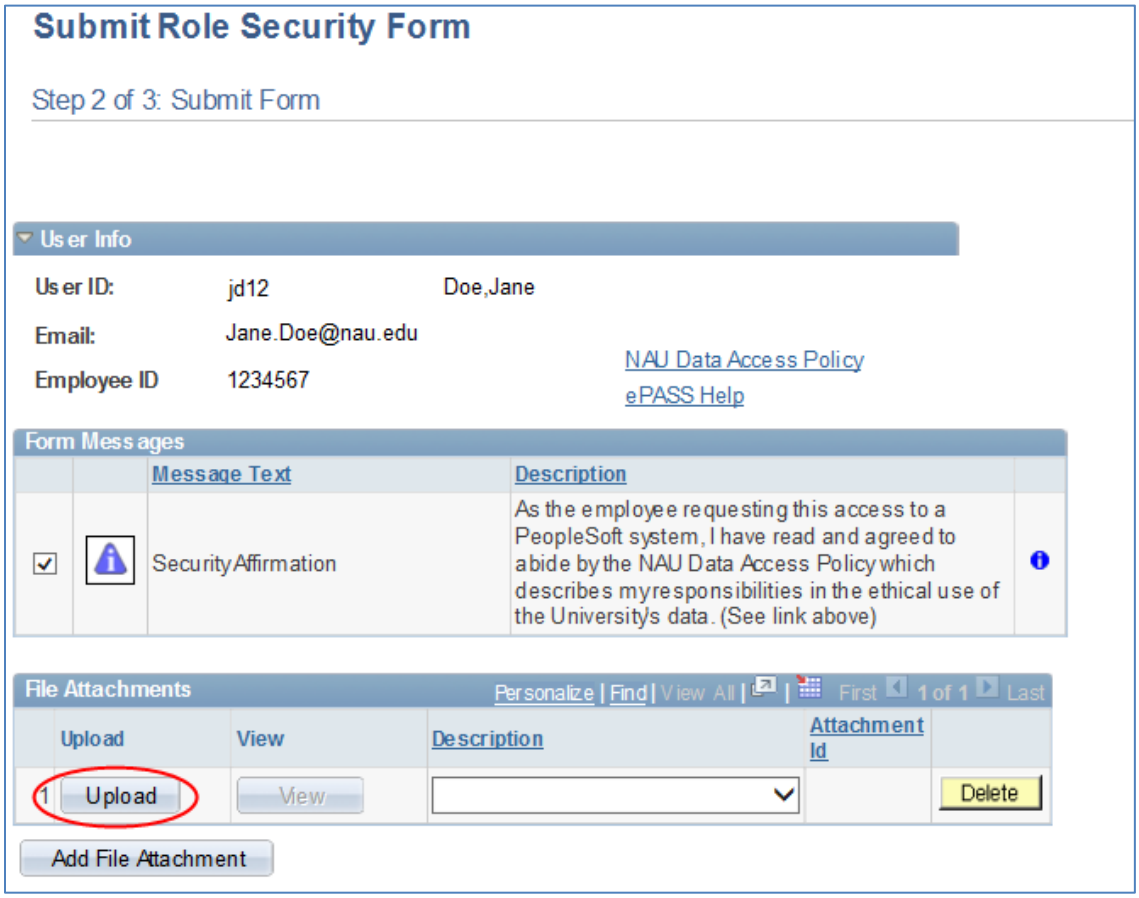
Request Roles: Enter the name of the role to be requested in the blank row. To search for a role, use the magnifying glass. To add more than one role to the request, use the '+' to add a row.

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.

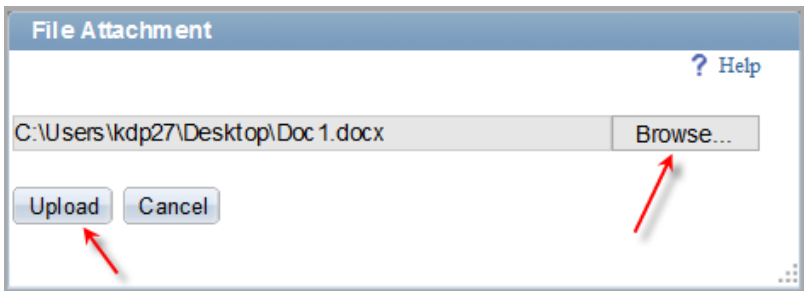
File Attachments:



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

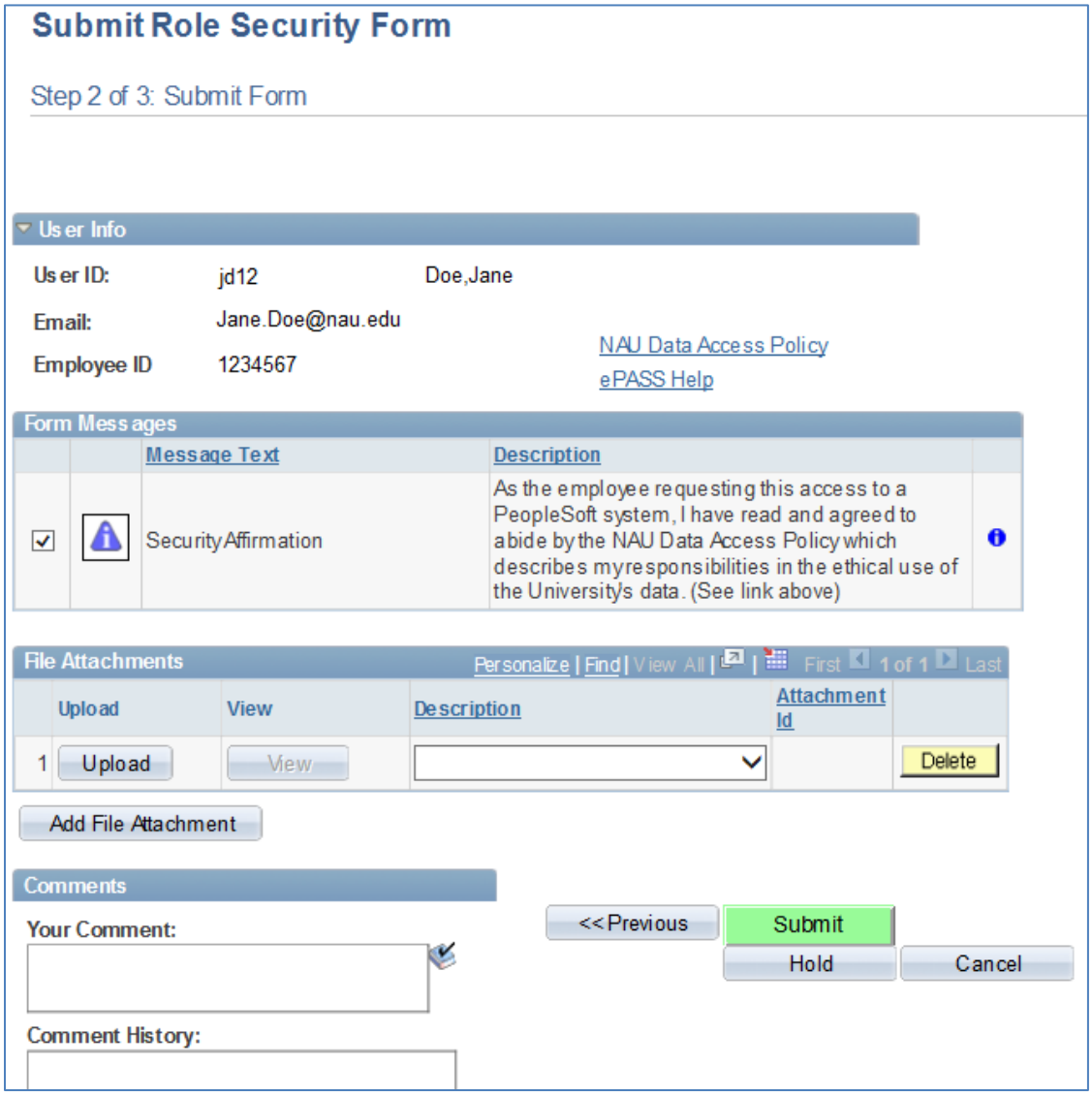
A blank field will appear with a 'browse' button. Click on the browse button to access your files and select the correct document. The document name will then appear in the field. Click 'upload' to attach the document. Use the Description drop down box to indicate the type of document you are attaching.

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.

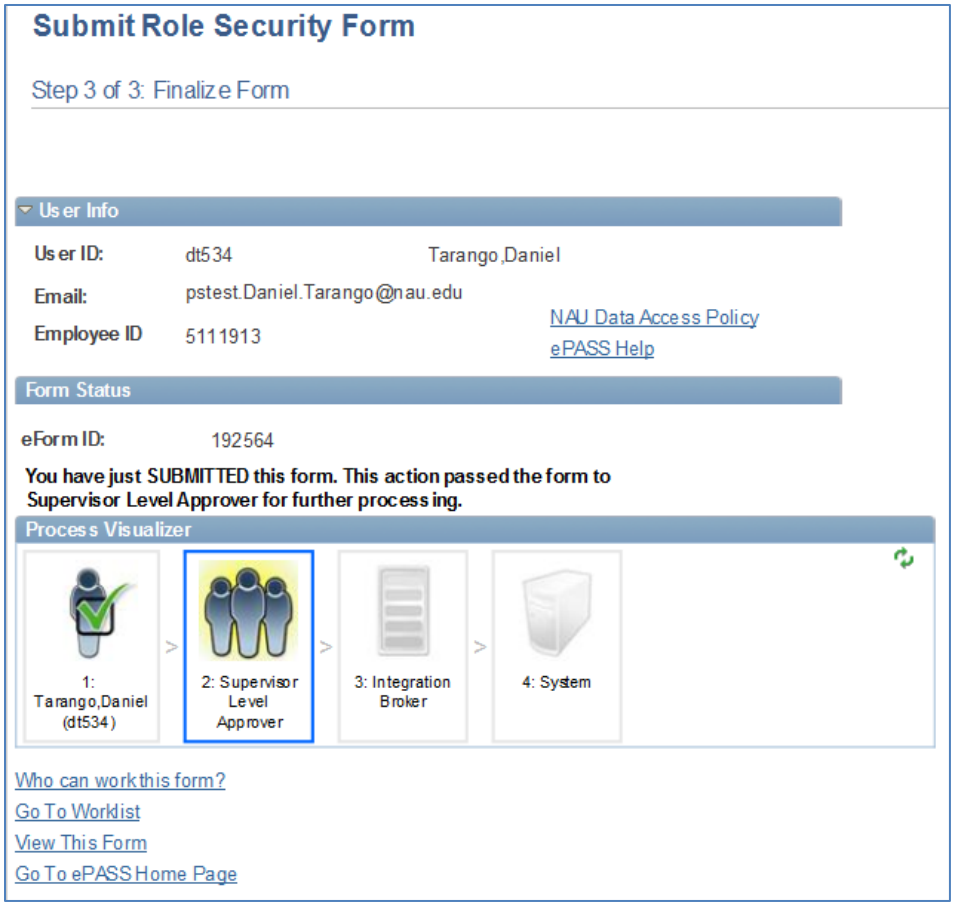


If necessary, use the 'Add File Attachment' to upload additional files.

Submit the Form:



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.



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 'Approver View' training document.

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

1. **The employee/affiliate will get an email with a link to confirm the request.**
2. **Data steward(s) and/or other reviewers will approve the request.**
3. **After all approvals are complete the system will automatically assign the security.**
4. **You and the employee/affiliate will get an email stating that the security has been approved and assigned**
5. **If the request is denied or recycled you will receive an email with a link to update, withdra or view your request.**