

## 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 the FERPA Exam.
- Read the [NAU Data Access Policy](#)
- Find the correct role(s) to be requested or revoked
  - To view LOUIE Campus and LOUIE HR role descriptions go to the [LOUIE Reference Sheet](#)
  - To view LOUIE 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 HR and select the HR Home Page, click on the Employee eForms Tile.

LOUIE HR link: <https://hr.peoplesoft.nau.edu/>

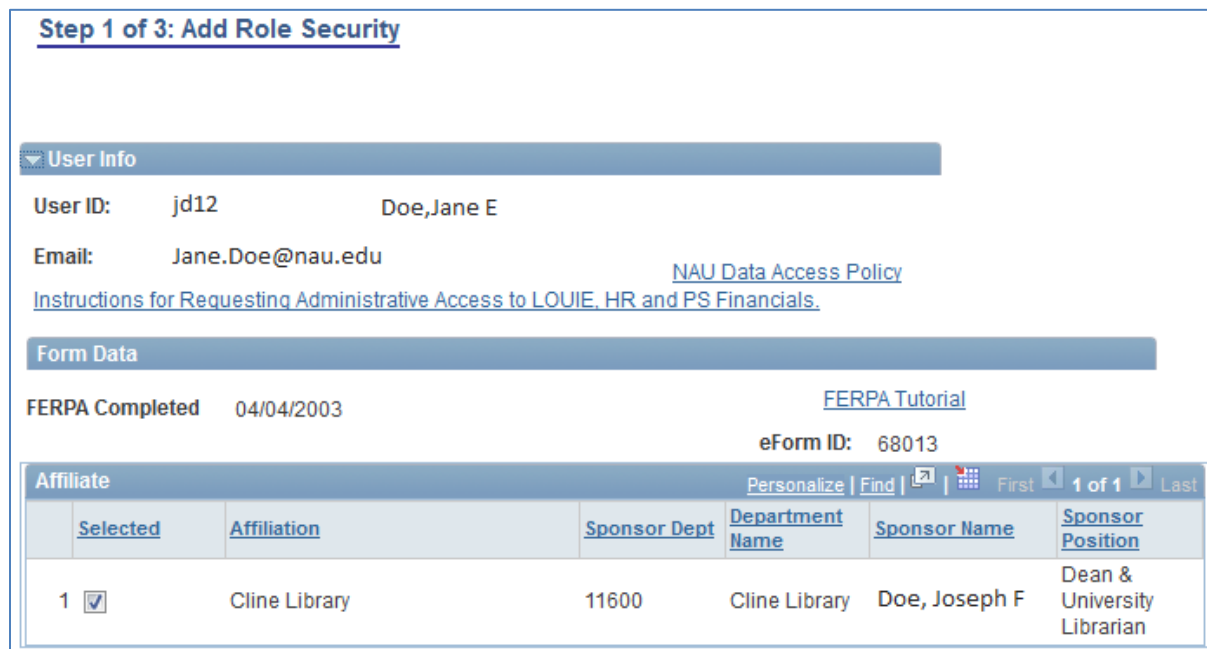


On the ePASS Home Page, Select – ‘Initiate a Security Request Form’



The screenshot shows the 'NAU Employee eForms' home page. On the left is a sidebar with 'ePASS Home Page' and 'View Your Report of Injury'. The main content area is titled 'Electronic Peoplesoft Administrative Security System (ePASS)' and contains four links with icons: 'Initiate a Security Request Form' (highlighted with a red arrow), 'Update a Security Request Form', 'Confirm Security Request Form', and 'View Security Request Forms'.

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.).



The screenshot shows 'Step 1 of 3: Add Role Security'. It includes a 'User Info' section with fields for User ID (jd12), Name (Doe, Jane E), and Email (Jane.Doe@nau.edu). Below this is a 'Form Data' section showing 'FERPA Completed' on 04/04/2003 and 'eForm ID: 68013'. At the bottom is a table with columns: Selected, Affiliation, Sponsor Dept, Department Name, Sponsor Name, and Sponsor Position. The table contains one row for 'Cline Library' with a sponsor named 'Doe, Joseph F' in the position of 'Dean & University Librarian'.

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	Student Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						

☒ 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	Student Accounts								

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 form titled 'Request Security' and 'Currently Assigned Administrative Security'. The 'Request Security' section has a table with a 'Role Name' column and a search icon. The 'Currently Assigned Administrative Security' section has a table with a 'Role Name' column and a list of roles. Red arrows point to the search icon and the '+' button. Text annotations explain the search and adding roles functionality.

**Request Security**

Personalize | Find | First 1 of 1 Last

Role Name
1

**Currently Assigned Administrative Security**

Personalize | Find | First 1-6 of 6 Last

Role Name
1 NAU_AD Adm Recr Standard View
2 NAU_AP Inquiry
3 NAU_CC Basic Service Provider
4 NAU_FA Fin Aid Status View
5 NAU_FA MPN Manifest
6 NAU_SF Customer Acct Comments

Enter the name of the role being requested or use the magnifying glass lookup to search.

To add more than one role, use the '+' button

Next >>

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:

The screenshot shows the 'Submit Role Security Form' with 'Step 2 of 3: Submit Form'. It includes a 'User Info' section with fields for User ID, Email, and Employee ID. A 'Form Messages' section shows a 'SecurityAffirmation' message. A 'File Attachments' section shows an 'Upload' button and a table for 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"/> SecurityAffirmation	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 Upload	View		

Add File Attachment

**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**

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

Upload Cancel

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

**Submit the Form:**

**Submit Role Security Form**

Step 2 of 3: Submit Form

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**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	Delete
1 <span>Upload</span>	<span>View</span>	<div></div>	<div></div>	<span>Delete</span>

Add File Attachment

**Comments**

Your Comment:

Comment History:

<< Previous Submit Hold Cancel

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

[NAU Data Access Policy](#)

Employee ID

5111913

[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

6 | Page

***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.**