



**AZUSA PACIFIC**  
UNIVERSITY

Information and Media Technology

## PeopleSoft Security Request Form Instructions

Access to each of the PeopleSoft modules requires an employee's supervisor to submit a PeopleSoft Security Request Form. Instructions for each section of the form are below. For those sections which are found in all of the forms, there is only one set of instructions. For those sections which are unique to only one of the forms, there are separate instructions provided.

*Supervisor Information:* The PeopleSoft Security form should be completed and sent to the support desk by an employee's supervisor. The supervisor information should match the sender information from Hello Sign which indicates who has signed and sent the form to the Support Desk. *Note that the supervisor initials in this section are created by clicking on the initials field and using your mouse to draw the letters. The date field is filled in automatically.*

*Request Information* section: Choose the personnel action which prompted this request, or if this request is not related to one of those actions, choose 'Other'. *Note that only one field may be selected. If you wish to change your selection, uncheck the field previously chosen, then choose a new field.*

*Employee Information* section: Complete all fields with the information specified.

*Primary Affiliation with APU:* Check the box which most closely describes the employee's affiliation. *Note that only one field may be selected. If you wish to change your selection, uncheck the field previously chosen, then choose a new field.*

*Job Attributes:* Typically 2 boxes will be checked; first, either 'Part Time' or 'Full Time', then, either 'Temporary' or 'Regular'.

*Access Information:* This information differs depending on what form is being used.

***Finance Module:*** There are three types of access available to anyone not working in (or closely with) the APU Business Office. Choose the appropriate category.

*Level 1:* Allows individual to enter and manage purchase requisitions.

*Level 2:* Allows individual to view departmental reports in addition to the permissions granted under Level 1. When listing multiple department numbers for this level, it helps to separate your entries with commas.

*Level 3:* Allows individual to manage departmental budgets in addition to the permissions granted under Levels 1 and 2. When listing multiple department numbers for this level, it helps to separate your entries with commas.

*Location Information:* Indicate the default location where individual is working. This will serve as a 'ship to' location for purchases.

There is also a *Short Description* section available which allows you to provide more details about the access requested. Finally, you can provide the *APU NetID* of another employee with the same type(s) of access, or (where applicable) the NetID of an employee who previously held the same job.

***HR Module:*** There are four categories of access available. Choose the appropriate action for each category. These categories require approval from an HR director in each area requested. *Note that only one field may be selected for each category. If you wish to change your selection, uncheck the field previously chosen, then choose a new field.*

*Short Description:* To provide clarification, please provide a brief description of the access requested.

*APU NetID:* Where possible, provide the APU NetID of another employee with the same job responsibilities, or (where applicable) the NetID of employee who previously held the same job.

***Student Module:*** There are several categories of access available. *Note that only one field may be selected for each category. If you wish to change your selection, uncheck the field previously chosen, then choose a new field.*

*Student Information:* Choose the appropriate action for each category.

*Student Life:* Choose the appropriate action for each category. Note that these categories require approval from a director in each area requested.

*Short Description:* To provide clarification, please provide a brief description of the access requested.

*APU NetID:* Where possible, provide the APU NetID of another employee with the same job responsibilities, or (where applicable) the NetID of employee who previously held the same job.