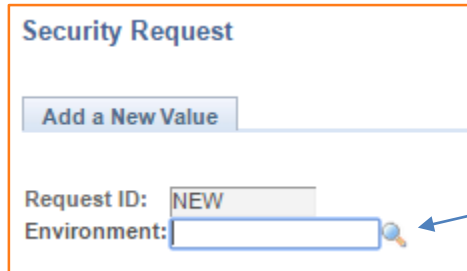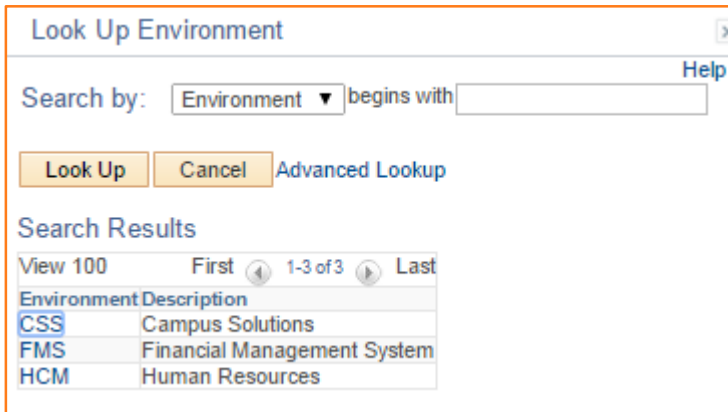## Creating Security Request Form

- Log in to the My BGSU portal and select "**Security Request**" under MISC SERVICES within the **Employees tab**. You will be redirected to the Security Request launch page within the PeopleSoft environment.
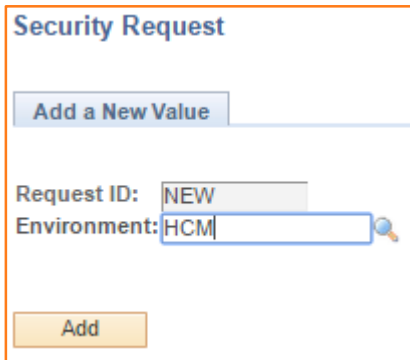- Click the **Add Request** button to start a new request

Add Request

- On the Security Request page type "**HCM**" into the Environment field or click on the magnifying glass to open the Look Up Environment search page and select "**HCM**"

Security Request

Add a New Value

Request ID: NEW
Environment: [ ]

Tip: Use the Magnifying Glass to search for values.

Look Up Environment   ✕

Help

Search by: Environment ▼ begins with [ ]

Look Up   Cancel   Advanced Lookup

Search Results

View 100   First ◄ 1-3 of 3 ► Last

Environment	Description
CSS	Campus Solutions
FMS	Financial Management System
HCM	Human Resources

- Click the **Add** button to start a new request

Security Request

Add a New Value

Request ID: NEW
Environment: HCM

Add

- Your user name and contact information will default into their respective fields. If you are requesting access for yourself, leave your user name in the BGSU User Name field.

Environment HCM

*BGSU User Name JSMITH

Tip: Search for people using the magnifying glass.

*Job Coordinator
*Department College of Education - Admin
*Phone 419/372-1234

- If you are requesting access for someone else, enter their user name into the BGSU User Name field or click on the magnifying glass to search for the person.
- If the system is unable to determine any of the contact information for yourself or the person you are requesting access for, you will be required to enter name, BGSU ID, job title, department and business phone number details. Some examples of when this might happen is for new employees or guests/contractors that need system access.

*BGSU User Name JSMITH   *Name
*BGSU ID
*Job
*Department
*Phone

Tip: Always enter information about the person that access is being requested for.

- Enter the **Effective Date** for the request

*Effective Date 04/28/2015

Tip: The Effective Date is the earliest date the access is needed.

- Enter the **campus affiliation** for the person
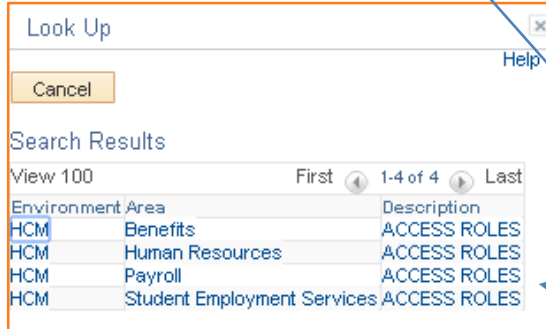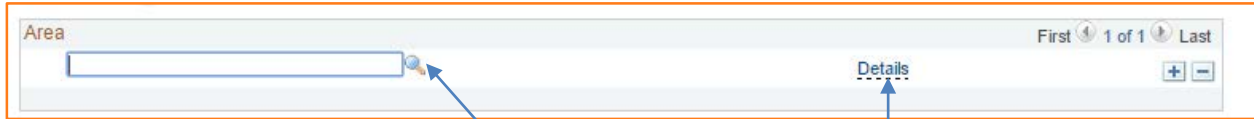
*Affiliation

Faculty
Other
Staff
Student

- If you are making a request to remove all access to the environment, check the **Remove All Access checkbox**. Examples of when a request to remove all access might be submitted include an employee leaving BGSU through retirement or termination or a change in the employee's department or job responsibilities. No further action can be taken on the request page if you select this option.

☑ Remove All Access

Adding HCM Access Roles

- HCM access roles are grouped by functional area. The magnifying glass can be used to search for and select applicable functional areas. Functional access areas will be defined as "**ACCESS ROLES**" in the look up.

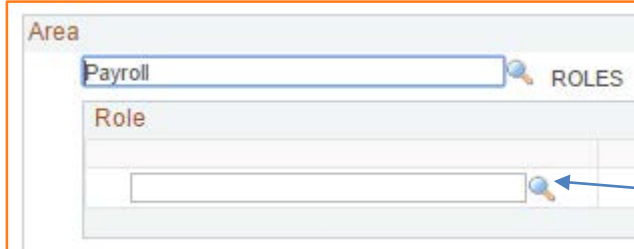- Use the ⊞ icon to add additional access role functional areas as needed

Tip: Click on the **Details** icon to see more information about the functional area

Tip: Use the **magnifying glass** to search for functional areas defined as "ACCESS ROLES"

- Within each functional area you will need to add the specific role(s) you are requesting access to. Use the **magnifying glass** to search for available roles within the functional area.

Tip: Use the **magnifying glass** at the Role level to search for specific roles you are requesting access

- For each role, you must indicate whether you are requesting that the role be added to or removed from your access by selecting the appropriate value from the Add/Remove drop down
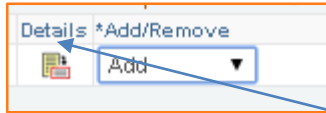

Tip: Click on the **Details** icon to see more information about the Role.

Tip: Use the ⊞ and ⊞ icons to add additional functional areas and additional roles within a functional area. The ⊟ icon will delete areas and roles from the request.
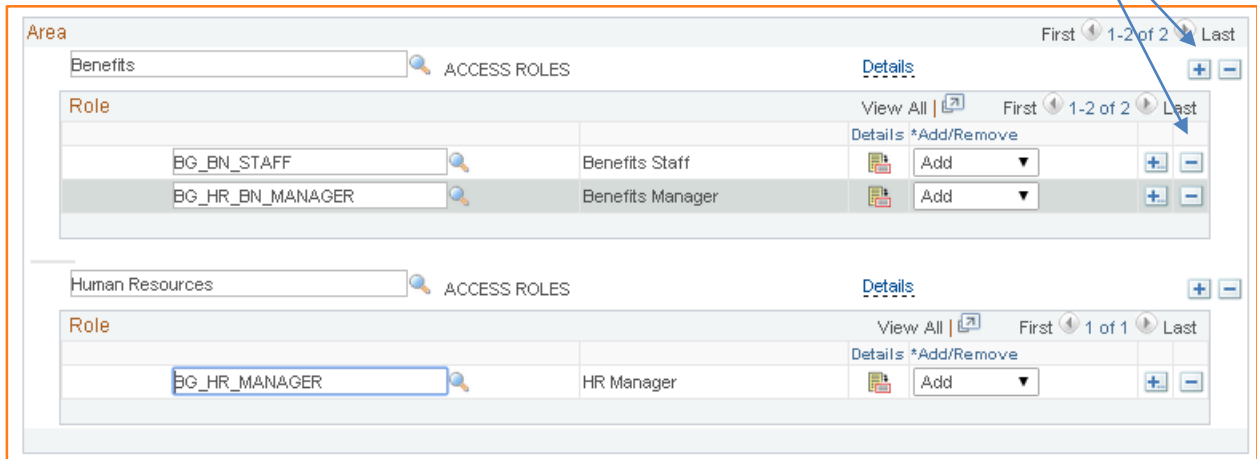
- When using the ⊞ icon, you will be prompted for the **number of rows you wish to add**.
- *The look of this prompt will vary by internet browser and you may be required to disable pop-up blockers:*
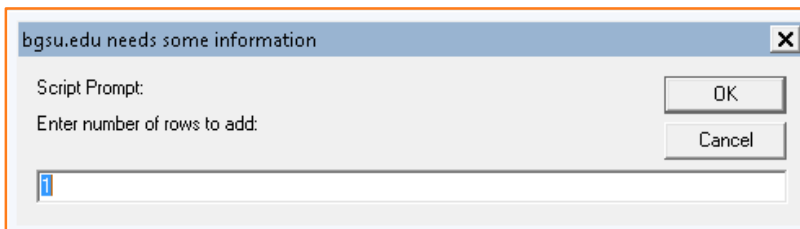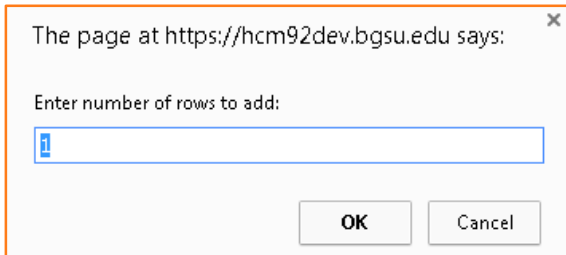
- A request can include any combination of Roles. Separate requests are not necessary.

- Enter **comments** if additional information about the request is warranted.

- If you are requesting access for yourself you will be required to acknowledge your agreement to the BGSU IT Policy and University Code of Ethics by checking the box next to the following statement.

By completing and submitting this Security Request Form, I am reconfirming that I agree and abide by the BGSU Information Technology Policy and Bowling Green State University Code of Ethics and conduct as originally agreed to upon receiving my BGSU account.

- Click on the **Submit** button to save the request and start the workflow approval process.
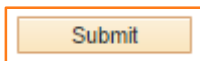
- You will receive a message indicating the Submit was successful

Security Request

Submit Confirmation

The Submit was successful.

OK
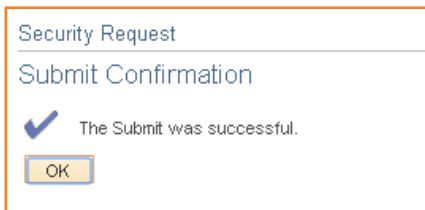
- Clicking **OK** will return you to the Security Request launch page, where you will see all of your previous requests

Understanding HCM Approval Workflow

- Clicking the **Details** button for any of your requests will enable you to see the current status of that request and where the request is in the approval workflow. The approval workflow will have three stages.
- The first workflow stage is Employee and Manager Approvals
    - o If you are requesting access for yourself, your manager/supervisor will need to approve the request. By agreeing to the IT Policy and Code of Ethics, your approval will be recorded as self-approved at the time you submitted the request.

Employee and Manager Approvals

:Pending

EE - Security and manager

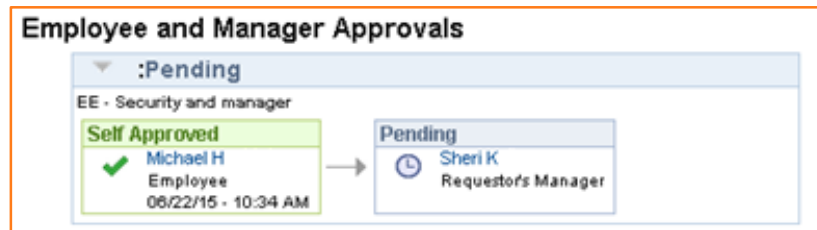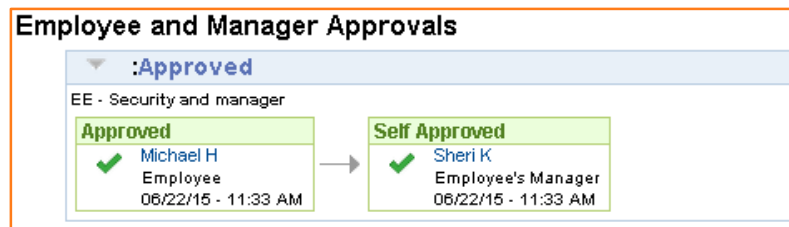| Self Approved	Pending
✔ Michael H Employee 06/22/15 - 10:34 AM	🕐 Sheri K Requestor's Manager

   - o If you are requesting access for one of your direct reports, the employee will be required to access the request, sign off on the policy statement and approve the request. As the requester, your approval will be recorded as self-approved once the employee completes their step.

Employee and Manager Approvals

:Approved

EE - Security and manager

Approved	Self Approved
✔ Michael H Employee 06/22/15 - 11:33 AM	✔ Sheri K Employee's Manager 06/22/15 - 11:33 AM

   - o If you are requesting access for an employee who does not report to you, the employee will be required to access the request, agree to the IT Policy and Code of Ethics statement and approve the request. The employee's manager/supervisor will then need to approve the request.

Employee and Manager Approvals

:Pending

EE - Security and manager

Pending	Not Routed
🕐 Erik E Employee	🖨 Chris W Employee's Manager

   - o If you are requesting access for an individual who is not an employee of BGSU, your manager/supervisor will need to approve the request

Employee and Manager Approvals

:Pending

EE - No security or no manager

Pending
🕐 Sheri K Requestor's Manager
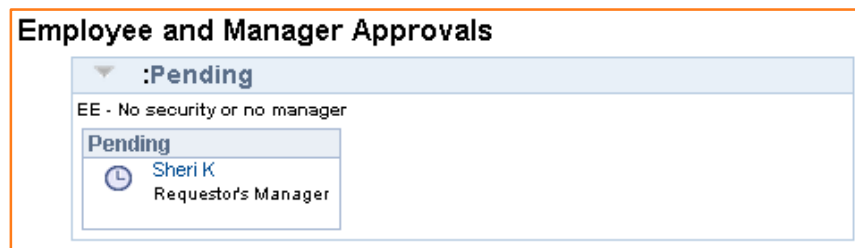
- The second workflow stage is Functional Approval
  - The type and number of approvals will depend on what specific functional access is being requested.
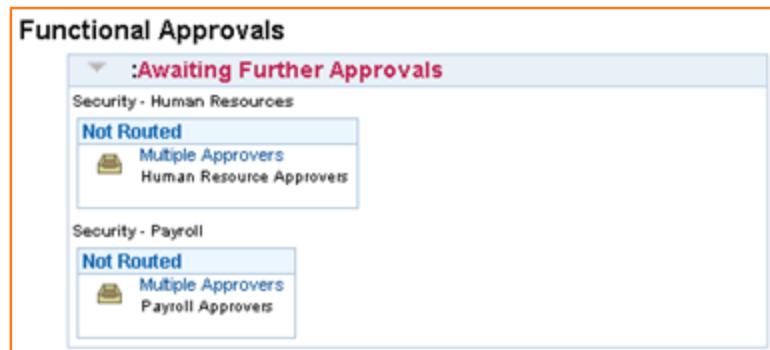
- The third and final stage is Information Technology Services Approval
  - This approval serves as the final approval once the access has been applied to the PeopleSoft environment

Approving HCM Security Requests

- As an employee, manager/supervisor or functional approver, you may be required to approve security requests.
- If a security request has entered your workflow queue, you will receive an email indicating that the request in waiting on you to take action.
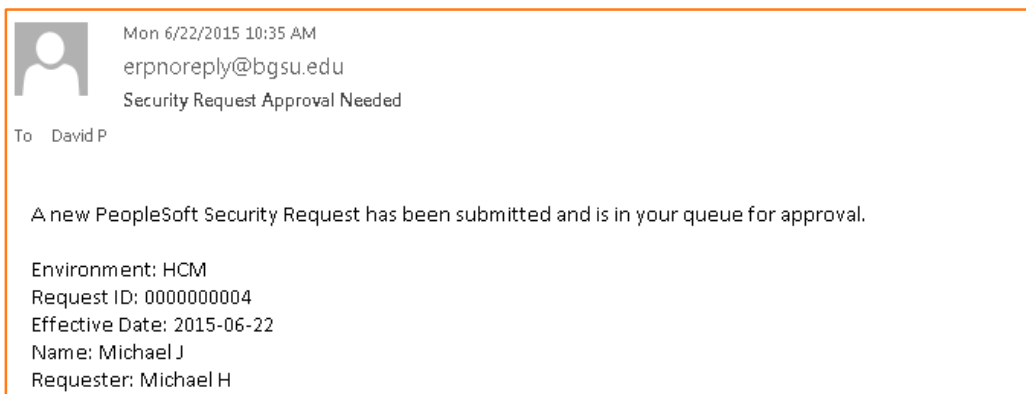
- To access the request, **click on the link within the approval request email**. You will be redirected to the Security Request Approval page where you will see a list of requests currently in your workflow queue.

Approve Security Request

The list below contains security requests requiring your approval.

| Security Requests					Personalize | Find | View All | 🖻 | 🖾		First ◀ 1 of 1 ▶ Last
Request ID	Environment	BGSU ID	Name	Requester's BGSU ID	Requester's Name	Submitted	Workflow Status
0000000005	HCM	0020251200	David P	0000154547	Michael H	06/22/2015	In Approval Process

- From the list, click on the **Request ID** to select the request you wish to take action on.
- If someone created the request for you, as the employee, you will be required to agree to the IT Policy and Code of Ethics by clicking on the box next to the statement.

☐ By completing and submitting this Security Request Form, I am reconfirming that I agree and abide by the BGSU Information Technology Policy and Bowling Green State University Code of Ethics and conduct as originally agreed to upon receiving my BGSU account.

EE and Manager Approval

▼ :Pending

EE - Security and manager

Pending		Not Routed
⏰ Michael H Employee	→	🖨 Sheri K Employee's Manager
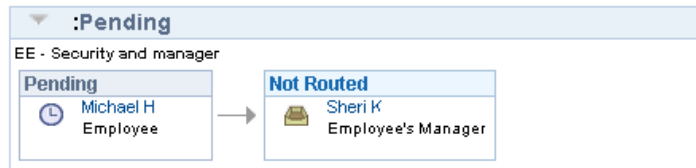
- To **approve or deny the request**, simply click on the appropriate button. As an approver, you can also enter comments related to your approval or denial of the request.

Comment

Approver Name

Comment [   ]

[Approve]   [Deny]

- Once the security request has made its way through all the approvals, the requester will receive an email indicating that the request was applied to the appropriate PeopleSoft environment. In the event that the request was denied at any point in the workflow, the requester will receive an email indicating that the request was denied.

Fri 6/19/2015 1:21 PM

erpnoreply@bgsu.edu

Security request approved

To

Your recent PeopleSoft Security Request has been approved:

Environment: HCM
Request ID: 0000000002
Effective Date: 2015-06-19
Name: Michael
Requester: Michael H