INSTRUCTIONS FOR COMPLETION

PeopleSoft Security Authorization Form

Users must complete this form to gain access to the PeopleSoft Financial System. The PeopleSoft Security Authorization Form is used by the PeopleSoft Security Administrator to determine what access a user is to have. Incoming forms will be reviewed individually. Any discrepancies will be noted and, if there is a problem, the form will be returned to the user. The PeopleSoft Security Administrator reserves the right to question the user’s request for access to certain DeptIDs, Fund Codes, and Project IDs. Therefore, be as accurate as possible in filling out this form. Upon completion, send the form to:

Jack J. George  
PeopleSoft Security Administrator  
University West, Room 329  
Location Code: 7006  
Phone: 368-0402  
Fax: 368-4867  
Email: jjg7@po.cwru.edu

The following fields must be filled out on this form:

- Name
- Date
- Phone Extension
- CWRUnet ID (Email ID)
- Department
- Title
- Action – Add / Change / Delete

Filling out Part I: Authorization for DEPTID

To gain access to management center or department operating funds, complete Part I. Checking the “All Dept ID’s” box will give the user access to ALL departments within the University. To access individual management centers or departments, check the “Individual Management Center or Departments” box and enter the appropriate 4-digit department ID in the spaces provided. Also indicate the type(s) of transactions (salary and/or non-salary). The “Roll-Down” box will grant the user access to ALL funds and projects that are intercoded to that management center or department.

To gain access to ALL departments within a particular management center, use the following management center codes in Part I:
Filling out Part II: Authorization for Fund Code

To gain access to individual funds or fund ranges independent of the department or management center indicated in Part I, users must complete Part II of the security form. Remember that if you checked the “Roll-Down” box in Part I, you will already have access to all funds within that department. To access additional funds check the appropriate box(es) in Part II. You can request access to ALL funds within a fund type or select “Individual Funds” and enter the funds in the spaces provided on page 2.

The “Individual / Additional Fund Codes” section on page 2 allows you to enter funds individually or in ranges. To enter a range of funds, enter the beginning fund in the first column, check the “To:” box and enter the ending fund in the second column.

Filling out Part III: Authorization for Project ID

To gain access to individual projects independent of the department or management center indicated in Part I, users must complete Part III of the security form. Remember that if you checked the “Roll-Down” box in Part I, you will already have access to all projects within that department. To access additional projects, enter the 6-digit project ID(‘s) in the spaces provided. To access all segments and sub-segments that roll up to a parent project, enter the 5-digit parent number and access will automatically be granted to all dependent projects.

Obtaining Signatures

**User Signature** – User has read and agrees to comply with the CWRU Ethics Policy. The University reserves the right to monitor access and use of computing resources.

**Supervisor Signature** – Supervisor has read and agrees to comply with the CWRU Ethics Policy. Furthermore, the supervisor accepts responsibility to notify the PeopleSoft Security Administrator via this form in the event of user transfer, termination, or if the user is no longer affiliated with the University.

**Management Center Signature** – If applicable. Management center has verified that the request is consistent with established University/school/department policies and procedures. Owner of the data from which the user has requested access grants permission.
PeopleSoft Security Administrator Signature – The request has been authorized by appropriate application owners. Security request is consistent with University policies and procedures. Acknowledges review of security procedures with user, supervisor, and management center as necessary.

Additional Notes:

1. A *PeopleSoft Security Authorization Form* must be submitted prior to attending the on-line training session.

2. Please refer any questions concerning Row Level security or this form to Jack J. George in the Controller’s Office.