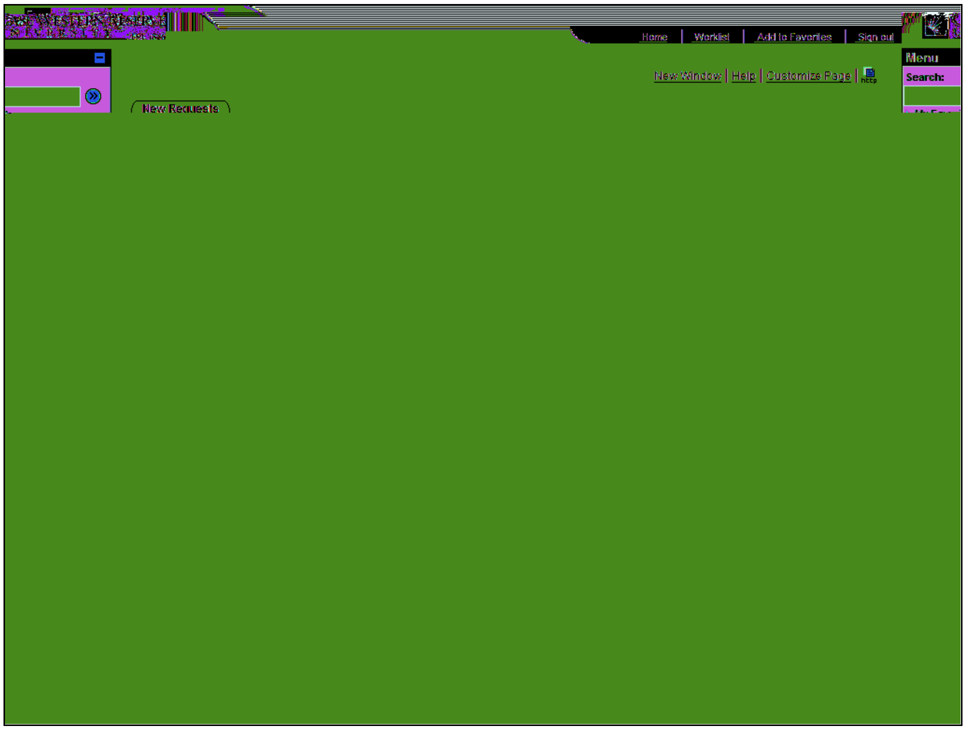
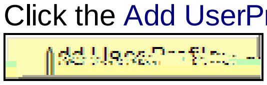
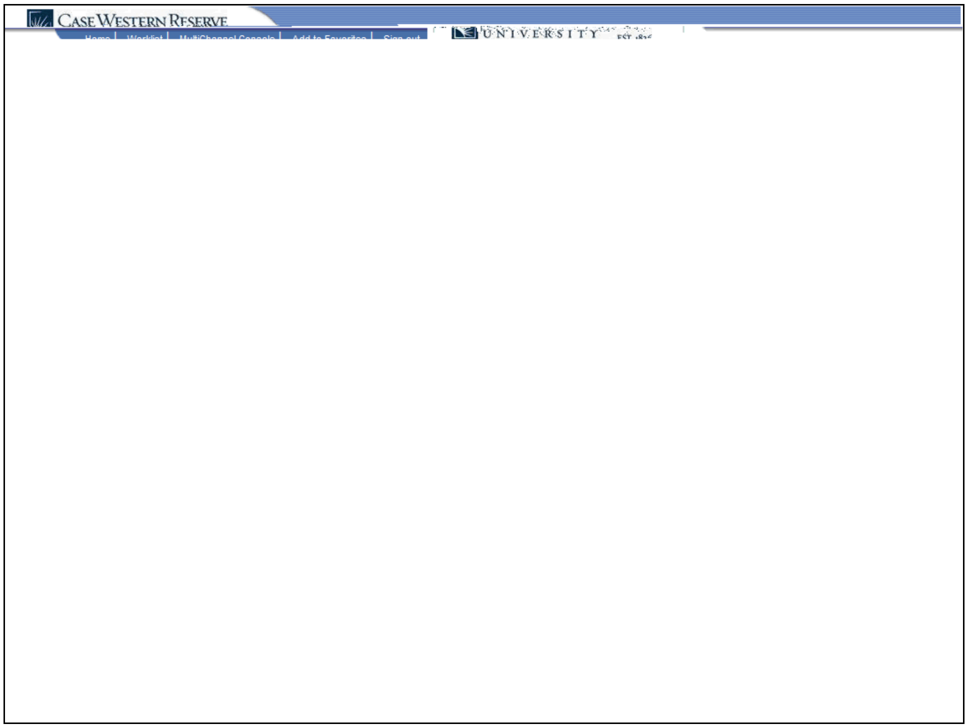
Information Technology Services Reference Sheet
Completing the Security Form

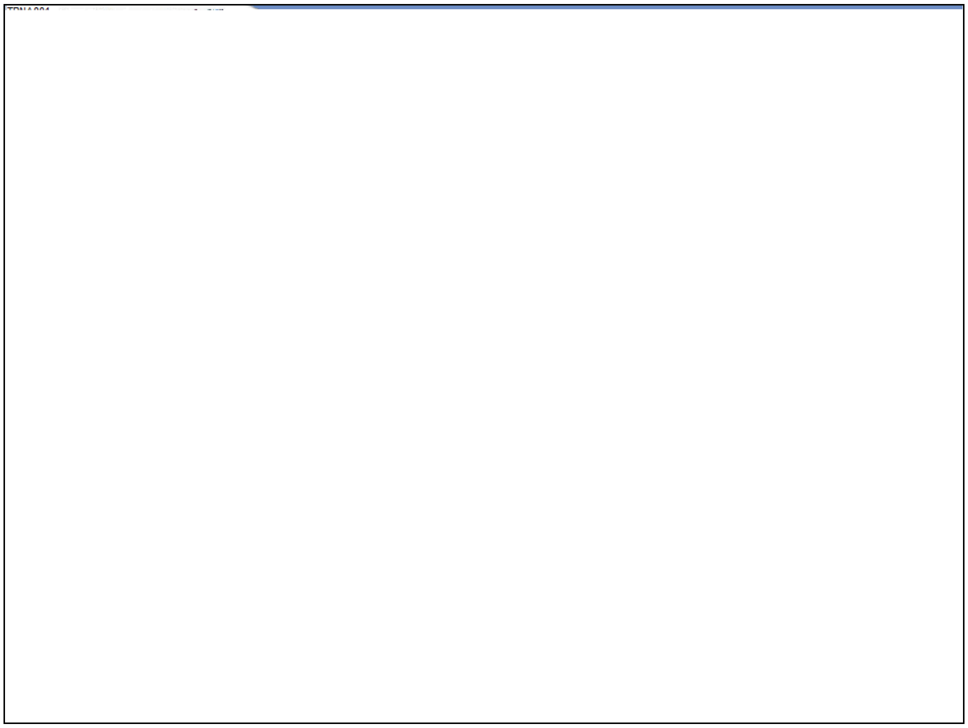
Concept

The Online Security form is used to request and grant access to employees who will be using the



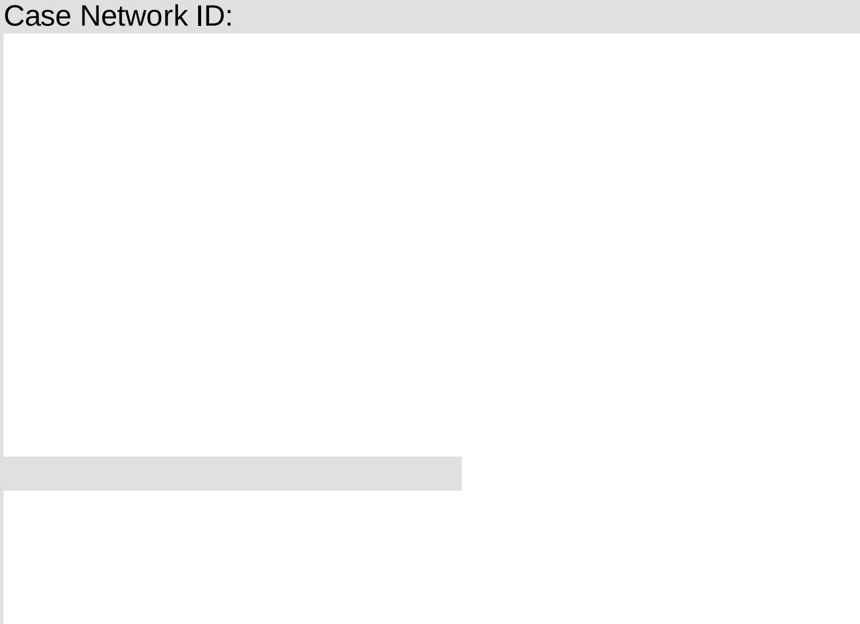
Step	Action
5.	The EMPLID and the Name of the person appears. Verify this is the correct person. If the person had a security request previously, information about those requests will appear below the name along with the buttons to Change or Inactiviate the existing security. Click the Add UserProfile button. 


CASE WESTERN RESERVE



Step	Action
7.	The Security Access Request tab appears. Enter the phone number of the person who needs access in the Phone Number field. Make sure to include 10 digits in the format of xxx/xxx-xxxx.

The following field are pre-populated:
Case Network ID:



Step	Action
13.	Enter the Room Number in the Room # field.
14.	Enter the 6 digit Department ID in the Department ID field. *Department ID
15.	Enter the CWRU Network ID of the Supervisor of the person needing security in the Network ID field. Supervisor
16.	Select the items that the person will need access to use. Be sure to enter the Requisition Approver's CWRU Network ID in the field provided. The Requisition approver must have a higher level of approval authority then this person. Requisition Approver's Case Network ID:

<u>Purchasing / eProcurement Section</u>
Submit Requisitions: This person will submit Purchase Requisitions, please check this box. If not, leave it blank.
Inquire on Requisitions/Purchase Orders This person can view Purchase Requisitions
that were entered by themselves or by others, please check this box. If not, leave it blank.
Requisition Approver's Case Network ID: If applicable, enter the name of the person that will approve
this person's requisitions after they have been entered. (Please note that all requisitions
exceeding your approval authority will be routed to this person first.)
Requisition Approver (Name): This will populate after the Network ID is entered.

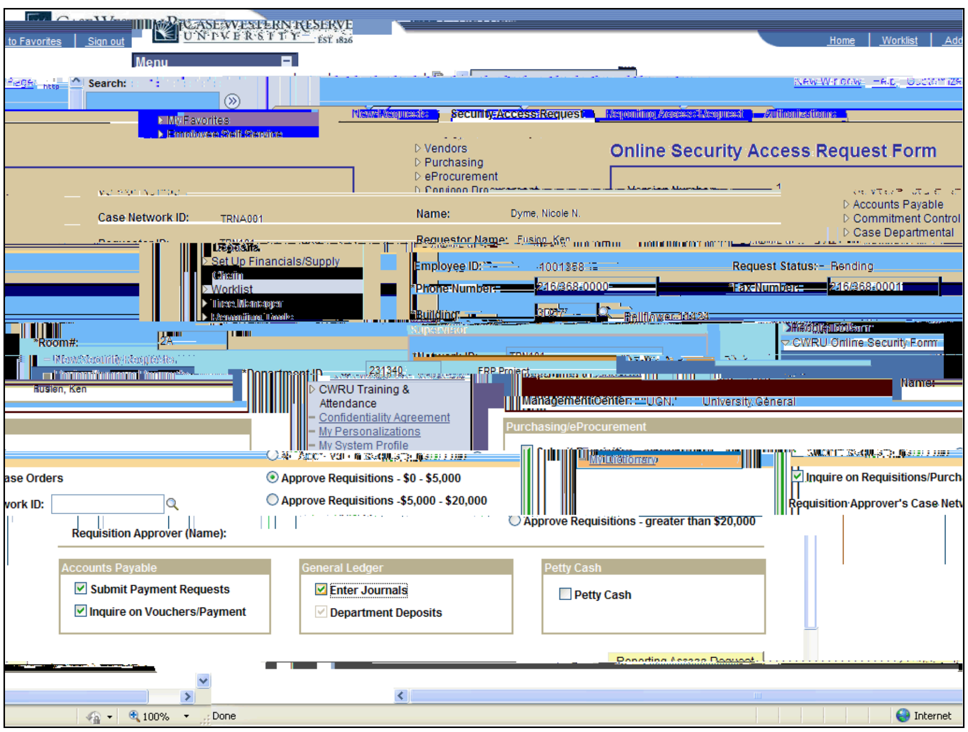
No Approval on Requisitions- This person can create requisitions but can not approve them.
Approve Requisitions- $0 - $5,000: If this person is authorized to approve Requisitions up to $5000,
please check this box. If not, leave it blank.
Approve Requisitions -$5,000- $20,000: If this person is authorized to approve Requisitions up to
$20,000, please check this box. If not, leave it blank.
Approve Requisitions – greater than $20,000: If this person is authorized to approve Requisitions
over $20,000, please check this box. If not, leave it blank.

<u>Accounts Payable Section</u>
Submit Payment Requests: This person can submit Payment Reques

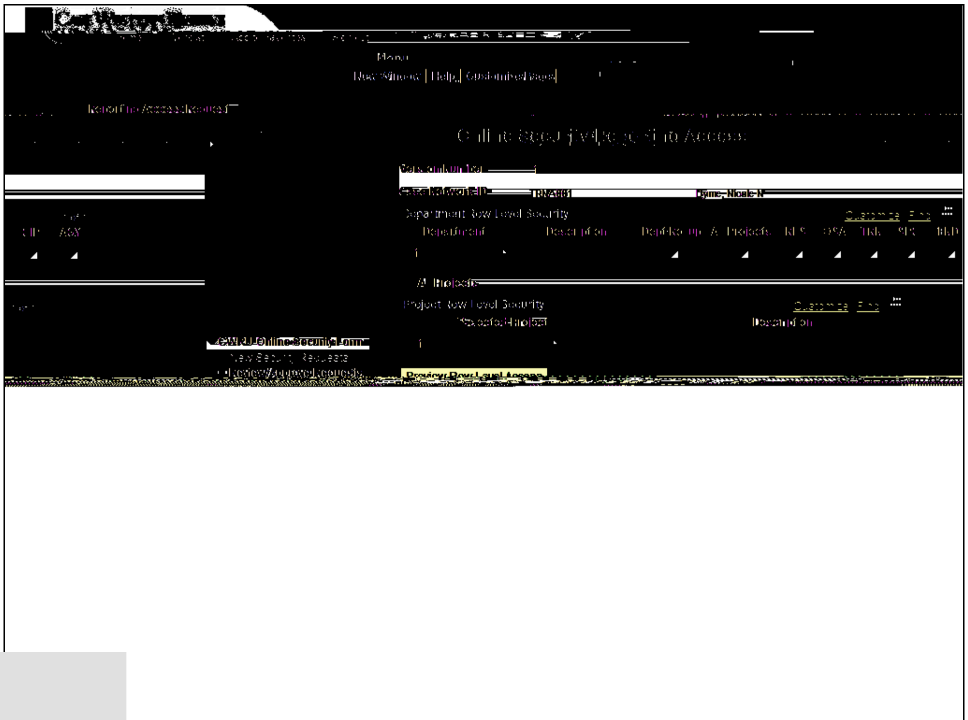
please check this box. If not, leave it blank.
Inquire on Vouchers/Payment: This person can view Payment Request and Vouchers that were entered by them or by other users, please check this box. If not, leave it blank.

<u>General Ledger Section</u>:
Enter Journals: This person can enter Financial Journals either online or through the Spreadsheet Upload interface, please check this box. If not, leave it blank.
Department Deposits: This access is given by default to all PeopleSoft Financials users. It is automatically checked.

<u>Petty Cash Section</u>:
Petty Cash: This person will enter Petty Cash Vouchers.



Step	Action
17.	When finished, click the **Reporting Access Request** button. Reporting Access Request



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Reporting Access Request tab information appears.
EIf no access to Financials Reporting is requested, this section can be left
. It is not required to fill out the Reporting Access Request to complete the
rity form.

omplete the Reporting Access section, enter the 6 digit Department number
ccess to be given in the Departmentfield. In addition, selet the check boxes
 additional items to narrow or expand access rights.

rtment Row Level Security
rtment: The 6 digit department ID
Rollup - Department rollup allows access to all Departments that
 to the Department entered.
ojects -All projects associated with the primary department and
 departments if applicable.
 Research Speedtypes, must be associated with the Department
ed.
 Other Sponsored Activity Speedtypes
 Training Speedtypes
SPC-3scn Td (I)]TJ 0 Tc 0 Tw 1.261 0 Td ( )Tj -0.009 Tc 2 T63161 0192 1.d

Step	Action