

Wesleyan University PeopleSoft Systems

SFIS, HRMS, WFS

Using the PeopleSoft Security Request/Change Form for All PeopleSoft Systems

PeopleSoft Systems (SFIS Student/Faculty Information System, HRMS Human Resources System and WFS Wesleyan Financial System)

If you are a new employee or have recently acquired new job responsibilities which require access into SFIS, HRMS or WFS, please ask your supervisor to submit the combined [PeopleSoft Security Request/Change Form](#). The form is available on both the [SFIS Blog](#) and in your Portfolio under Forms.

The form is a PDF document that is to be filled in on line for one, two or all three systems as required. The blue areas are the fields where information is to be entered.

PeopleSoft Security Request/Change Form for All PeopleSoft Systems
(SFIS Student /Faculty Information System, HRMS, Human Resources System and WFS Wesleyan Financial System)

Effective date for this request: _____

Create Access Modify Access Delete Access

Name Change: Is this a name change without any other change in access: Yes No
If yes, please enter the original (old) User Name/email address: _____

This request is for:

SFIS (Admission, Registrar, general student information) HRMS (Student/Temp Time entry) WFS (Vouchers, P-Card reconciliation, Purchase Orders, general financial information)

If security access is the same as another user or former users, Indicate Username: _____

User Information: Name _____ Wes ID: _____
Dept. Name _____ Dept. Number (xxxx) _____ Phone: _____
Title: _____ Campus Mail Address: _____
Wesleyan Email Address: _____@wesleyan.edu Lab (Grad Student Only) _____

SFIS Access (check all that apply)	HRMS Access (check all that apply)	WFS Access (check all that apply)
<input type="checkbox"/> Ability to run queries	<input type="checkbox"/> Student Time Entry	<input type="checkbox"/> General SmartDoc access (Includes Vouchers, PO's, Journals, Deposit Transmittal and Grant Proposal)
<input type="checkbox"/> Ability to run reports	<input type="checkbox"/> Temp Time Entry	<input type="checkbox"/> Purchase Orders only (for graduate students)
<input type="checkbox"/> Other access. Describe: _____	<input type="checkbox"/> Other - Describe below: _____	<input type="checkbox"/> P-Card Reconciliation pages
		<input type="checkbox"/> Give access to all SmartKeys in User's department
		<input type="checkbox"/> Give access to these specific SmartKeys: _____

Additional Information/Access. If user is a WFS approver, please provide details

Requestor/Approver (Someone other than the User listed above):

Printed Name of Requestor: _____ Date: _____
Department: _____ Phone: _____
Requestor's email address _____@wesleyan.edu

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NOTE: If you are using Windows, you should be able to fill out the form and submit it as indicated below. However, if you are a Mac user, you may not be able to do so. In that case, you can save the form as a PDF, fill it out, and email it to pssecurity@wesleyan.edu

A few notes about filling in the information

- Please provide information as completely as possible.
- Indicate the date this request/change **will be effective**.
- Click on the button to indicate the type of access – Create, Modify or Delete. Only one may be selected.
- If this is simply a change in the name of the user, answer Yes in the **Name Change** section and supply the original name.
- Check the appropriate system or systems next to **This request is for**.
- **The speediest and most efficient way to grant access is to copy the security information of an existing user.** If that is the case, please enter that person's name in the next blue box where shown.
- As much as possible, try to use the text fields and check boxes provided. But, if there is further information to be added, feel free to use the "Additional Information/Access" field.

Submitting or Emailing the Form to pssecurity@wesleyan.edu

- Once the form is completed, you can save a copy as a PDF file for your records by clicking on File > Save As.
- You may either submit the form, as shown below using the Submit Form button, or you may email it to pssecurity@wesleyan.edu as an attachment.
- To submit using the button, click the purple **Submit Form** button the upper right-hand corner.

Please fill out the following form. When finished, click Submit Form to return the completed form. You can save data typed into this form.

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Human Resources System and WFS Wesleyan Financial System)

Effective date for this request: _____

Create Access Modify Access Delete Access

Name Change: Is this a name change without any other change in access: Yes No
If yes, please enter the original (old) User Name/email address: _____

This request is for:
 SFIS /Admission Registrar HRMS /Student/Temp Time WFS /Numbers P Card

- The following page will pop up.
 - Under **From: Email Address** enter your Wesleyan email address
 - Under **Full Name** enter your name. (Notice the tip at the bottom of the page regarding saving your address and name in Acrobat's Identity preferences.)
 - Click the **Send** button.

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Send Form

To: pssecurity@wesleyan.edu

Subject: Submitting Completed Form

Attachment: PeopleSoftSecurityForm_distributed.pdf

From: wwesley@wesleyan.edu

Full Name: Weston Wesley

Remember me

To save your email address and name in Acrobat's Identity preferences, check Remember me. Do not check this box if you are using a public computer.

Send Cancel

- The first time you submit a form, the following page may open asking you to choose which email client you are using.
 - Select the first item **Desktop Email Application**.
 - Also, click the **Don't show again** checkbox. By doing so, when you complete and submit a form the next time, this box will not appear.
 - Click the **OK** button.

Select Email Client

Please indicate the option which best describes how you send mail.

Desktop Email Application

Choose this option if you currently use an email application such as Microsoft Outlook, Eudora, or Mail.

Internet Email

Choose this option if you currently use an Internet email service such as Yahoo or Microsoft Hotmail. You will then need to save your form and return it manually to CPIKE01@wesleyan.edu using your Internet email service.

Don't show again

OK Cancel

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- If this is the first time you are submitting a form, a page similar to this may open.
 - Click on the **Don't show again** check box. When you submit any forms hereafter, this will page will not pop up.
 - Click OK.



- An email with the completed PDF form has been sent, and the request will be acted upon. An email notification will be sent once the process has been finalized.