



## PeopleSoft Access Request Form

American River College  
Cosumnes River College  
District Office  
Folsom Lake College  
Sacramento City College

### General Services Requisition Security Guide

Requisition Security access is broken down into three key components. This document outlines the purpose of each, how they work together, and provides guidance on how to request the appropriate security to meet a user's business needs. See the [Online SAS Requester Guide](#) for instructions on how to use the Security Access System. Please also reference the [General Services Definitions of Roles](#) document for detailed information about the pages the roles described below will gain access to in the PeopleSoft Financials system.

**Note:** requisition access is granted only to business areas trained to use the online requisition functionality in PeopleSoft. Contact the Purchasing Department at (916) 568-3071 for information.

#### Requisition View

- Who Should Request This Role
  - Staff who wish to view requisitions in PeopleSoft Finance
  - Staff who wish to print requisitions from PeopleSoft Finance
  
- How to Request This Role
  - Use the PeopleSoft - General Services security request form and select "Requisition View"

PeopleSoft - General Services		
Employee: 0000000 - Employee Student	Employee type/Title: Staff-Test	Location/Dept: DO, Test
Request ID: 17417	Work Phone: 1234	
Requested by: Mina Walter	Effective date: 10/28/2016	
Select the access levels below that you are requesting for this employee (items with checkmark indicate employee's existing access - uncheck any existing access you wish to remove):		
<b>Purchasing (PO)</b> <input type="checkbox"/> PO Print Access <input type="checkbox"/> PO Buyer Basic Access <input type="checkbox"/> PO Buyer Senior Access <input type="checkbox"/> PO Supervisor Access  <b>Receiving</b> <input type="checkbox"/> Receiving View <input type="checkbox"/> Receiving Access  <b>Requisitions</b> <input checked="" type="checkbox"/> Requisition View <input type="checkbox"/> Requisition Entry Access <input type="checkbox"/> Requisition Approver Access	<b>Vendor</b> <input type="checkbox"/> AP Campus Vendor Access (C)	<b>Additional Security</b> <input type="checkbox"/> FS After Hours
*Justification/Reason: (up to 254 chars)		
<input type="button" value="Continue"/> <input type="button" value="Cancel request"/>		

## Requisition Entry Access

- Who Should Request This Role
  - Staff who will be entering and processing requisitions in the PeopleSoft Finance system
  - Staff will be granted the ability to review budget information, view matching activity on their requisitions (receiving, invoicing, etc.), and view vendor files in the system.
- How to Request This Role
  - Requesting this access requires completion of a two-step process:
    1. Use the PeopleSoft - General Services security request form and select “Requisition Entry Access”

**PeopleSoft - General Services**

Employee: 0000000 - Employee Student    Employee type/Title: Staff-Test    Location/Dept: DO, Test    Request ID: 17417  
Work Phone: 1234  
Requested by: Mina Walter    Effective date: 10/28/2016

Select the access levels below that you are requesting for this employee  
(items with checkmark indicate employee's existing access - uncheck any existing access you wish to remove):

<b>Purchasing (PO)</b> <input type="checkbox"/> PO Print Access <input type="checkbox"/> PO Buyer Basic Access	<b>Vendor</b> <input type="checkbox"/> AP Campus Vendor Access (C)	<b>Additional Security</b> <input type="checkbox"/> FS After Hours
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**PeopleSoft - General Services**

Employee: 0000000 - Employee Student    Employee type/Title: Staff-Test    Location/Dept: DO, Test    Request ID: 17417  
Work Phone: 1234  
Requested by: Mina Walter    Effective date: 10/28/2016

You have requested the following:

Add	Role	Requisition Entry Access	LR_FS_PO_Requisition_Entry	FS Database
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This request requires additional access forms be completed. Click a link below to continue:  
[Request FS Requisitions - Add/Update Entry Access for Employee Student](#)

Continue    Cancel request

2. Complete this form and hit the “Continue” button and the screen below will be displayed. Note the text in the red box. Click the “Request FS Requisitions Add/Update Entry Access for <Employee Name>” link
3. List employee info for all “requesters” for whom the requisition entry person has authority to set up requisitions in Peoplesoft Finance. There is space at the bottom of the form to enter employees who should be *removed* from the list of “requesters” for the entry person.

## FS Requisitions - Add/Update Entry

Employee: 0000000 - Los Rios Student  
Requested by: Mina Walter

Employee type/Title: Class, Temp-Test  
Effective date: 11/02/2016

Location/Dept: DO, Test

Request ID: 17378

Select the access levels below that you are requesting for this employee:

This employee can enter requisitions for the following staff:

Emplid	Name
0000001	Requester 1
0000002	Requester 2
0000003	Requester 3

Use this section to remove access  
This employee can NO LONGER enter  
requisitions for the following staff  
(include Emplid and Name):

0000004 Requester 4

### Requisition Approver Access

- Who Should Request This Role
  - Staff who will be approving requisitions in the PeopleSoft Finance system
  - Staff will be granted the ability to review budget information, view accounting entries and PO information.

- How to Request This Role
  - Requesting this access requires completion of a two-step process:

1. Use the PeopleSoft - General Services security request form and select “Requisition Approver Access”

PeopleSoft - General Services			
Employee: 0000000 - Employee Student	Employee type/Title: Staff-Test	Location/Dept: DO, Test	Request ID: 17417
Work Phone: 1234			
Requested by: Mina Walter	Effective date: 10/28/2016		
Select the access levels below that you are requesting for this employee (items with checkmark indicate employee's existing access - uncheck any existing access you wish to remove):			
<b>Purchasing (PO)</b> <input type="checkbox"/> PO Print Access <input type="checkbox"/> PO Buyer Basic Access <input type="checkbox"/> PO Buyer Senior Access <input type="checkbox"/> PO Supervisor Access  <b>Receiving</b> <input type="checkbox"/> Receiving View <input type="checkbox"/> Receiving Access  <b>Requisitions</b> <input type="checkbox"/> Requisition View <input type="checkbox"/> Requisition Entry Access <input checked="" type="checkbox"/> <b>Requisition Approver Access</b>	<b>Vendor</b> <input type="checkbox"/> AP Campus Vendor Access (C)	<b>Additional Security</b> <input type="checkbox"/> FS After Hours	
*Justification/Reason: (up to 254 chars)		Test	
<input type="button" value="Continue"/>		<input type="button" value="Cancel request"/>	

2. Complete this form and hit the “Continue” button and the screen below will be displayed. Note the text in the red box. Click the “Request FS Requisitions Add/Update Approver Access for <Employee Name>” link.

PeopleSoft - General Services			
Employee: 0000000 - Employee Student	Employee type/Title: Staff-Test	Location/Dept: DO, Test	Request ID: 17417
Work Phone: 1234			
Requested by: Mina Walter	Effective date: 10/28/2016		
You have requested the following:			
<input type="button" value="Add"/>	<input type="button" value="Role"/>	<input type="button" value="Requisition Approver Access"/>	<input type="button" value="LR_FS_PO_Requisition_Approver"/>
		<input type="button" value="FS Database"/>	
This request requires additional access forms be completed. Click a link below to continue: <a href="#">Request FS Requisitions - Add/Update Approver Access for Employee Student</a>			

3. List employee info for all “requesters” for whom the requisition entry person has authority to approve requisitions in Peoplesoft Finance. There is space at the bottom of the form to enter

employees who should be *removed* from the list of “requesters” for the entry person.

FS Requisitions - Add/Update Approver			
Employee: 0000000 - Los Rios Student	Employee type/Title: Class. Temp-Test	Location/Dept: DO, Test	Request ID: 17379
Requested by: Mina Walter	Effective date: 11/02/2016		
Select the access levels below that you are requesting for this employee:			
<b>Section 1: Select additional authorization if applicable</b>			
<input type="checkbox"/> Full Auth for All Requesters (Associate Vice Chancellor, Finance or Deputy Chancellor Only)			
<input type="checkbox"/> DO Authorization \$5000 & over			
<b>Section 2: This employee can approve, update and cancel requisitions for the following staff:</b>			
Emplid	Name		
0000001	Requester 1		
0000002	Requester 2		
0000003	Requester 3		
<b>Use this section to remove access</b> This employee can NO LONGER approve, update or cancel requisitions for the following staff (include Emplid and Name):		0000004 Requester 4	

- *Note: Section 1 of this form applies only to a select few executives at the District Office.*

It may become necessary periodically to modify the relationships between requestors and the staff assigned to enter and approve requisitions on their behalf. For example, when a new employee is hired into a department and will be requesting purchases, they will need to be assigned to a requisition entry person and a requisition approver. When this occurs, take the following steps:

1. Navigate to the SAS system and initiate a new request. Enter the required information for the requester for whom the changes need to be made and select the **FS Requisitions – Add/Update Requester(s)** supporting form.

**Request Access - User Information**

\* asterisks indicate required fields

*Employee ID#: <input type="text" value="0000000"/>	*Last Name: <input type="text" value="Doe"/>	*First Name: <input type="text" value="Jane"/>
*Work Phone: <input type="text" value="1234"/>		M.I.: <input type="text"/>
*Employee type: <input type="text" value="Classified Temporary"/>	Other: <input type="text"/>	*Job title: <input type="text" value="Sample Title"/>
*College/Site: <input type="text" value="District Office"/>	*Department: <input type="text" value="Sample Department"/>	
*Effective Date: <input type="text" value="10/21/2016"/>		

Select a security access form:

Or, select a supporting form:

\*(select either a main form or a supporting form)

2. Use the **FS Requisitions – Add/Update Requester(s)** form to identify staff who should be authorized to enter and approve requisitions for this employee.

**FS Requisitions - Add/Update Requesters**

Employee: 0000000 - Employee Student      Employee type/Title: Staff-Test      Location/Dept: DO, Test      Request ID: 17418  
 Work Phone: 1234  
 Requested by: Mina Walter      Effective date: 10/28/2016

Select the access levels below that you are requesting for this employee:

Section 1: Staff* that can enter requisitions for this user	
Emplid	Name

Section 2: Staff** that can approve requisitions for this user	
Emplid	Name

\*Staff listed under section 1 must have the PO Requisition Entry Access role. If not, the staff cannot enter requisitions for this user.  
 \*\*Staff listed under section 2 must have the PO Requisition Approver Access role. If not, the staff cannot approve this user requisition.

In the supporting form drop down, there are two additional forms that may be occasionally used for maintenance.

- **FS Requisitions – Add/Update Approver**

- This is the same form as shown in [step 3 of the Requisition Approver](#) access section of this document. Use it to add or remove requesters for an employee already set up with requisition approver access.
- **FS Requisitions – Add/Update Entry**
  - This is the same form as shown in [step 3 of the Requisition Entry access](#) section of this document. Use it to add or remove requesters for an employee already set up with requisition approver access.

**Request Access - User Information**

\* asterisks indicate required fields

<b>*Employee ID#</b> : <input type="text" value="0000000"/>	<b>*Last Name:</b> <input type="text" value="Student"/>	<b>*First Name:</b> <input type="text" value="Los Rios"/>	<b>M.I.:</b> <input type="text"/>
<b>*Work Phone:</b> <input type="text" value="1234"/>	<b>Other:</b> <input type="text"/>	<b>*Job title:</b> <input type="text"/>	
<b>*Employee type:</b> <input type="text" value="Classified Temporary"/>	<b>*Department:</b> <input type="text"/>		
<b>*College/Site:</b> <input type="text" value="Select a college/site"/>			
<b>*Effective Date:</b> <input type="text"/>			

**Select a security access form:**

\* (select either a main form or a supporting form)

**Or, select a supporting form:**

- Select a form
- PeopleSoft - Payroll Worksheet
- FS Requisitions - Add/Update Approver
- FS Requisitions - Add/Update Entry
- FS Requisitions - Add/Update Requesters
- Student Milestones

[Cancel and return to SAS main page](#)

*Note: employees who separate from Los Rios will automatically be removed from the requester list.*