

**GUIDE FOR  
HR PEOPLESOFT/PAGEUP  
SECURITY ACCESS REQUESTS**

Created 06.2019\_SJM

# HR PeopleSoft/PageUp Security Access

Effective June 10, 2019, the Human Resources Department transitioned the HR PeopleSoft/PageUp Security Access Request Form from a paper process to the DocuSign platform. This initiative improved efficiency and turnaround responses as requests are electronically submitted and routed to the appropriate signature authorities for review and approval process. Once department approval has been obtained and recorded in DocuSign, the form is routed to the appropriate HR representative(s) for review, approval and processing.

The HR Approvers have not changed and the electronic requests are routed accordingly:

- HR PeopleSoft Security - Sherrell McNamara
- PageUp Security - Kim Harris & Rosemarie Mahoney

Requestors and users receive a notification once access request(s) have been acted upon (status of Completed or Rejected) by the HR Approver(s).

## I. INSTRUCTIONS FOR SUBMITTING AND APPROVING REQUESTS (DEPARTMENT LEVEL).

1. The web form will automatically populate the user's name and email address in the Requestor field. If the requestor is different from the individual needing access, the requestor will have the opportunity to indicate the user's information in another section (see bullet #4).
2. The Department Approver's name and email address will be required when initiating the request. This will allow DocuSign to route the form to the appropriate approver.



## Security Access

<b>Requestor</b>	<b>*Name</b> Sherrell McNamara	<b>*Email</b> mcnamara@umbc.edu
<b>Department Approver</b>	<b>*Name</b> Name	<b>*Email</b> Email
If the User needs Payroll Preparer or Payroll Approver access only, please complete the Signature Authorization Form instead of this form.		<b>*Requested Access Type</b> --choose--
		<b>*Role Specifics</b> --choose--
<b>*Empl ID of User Receiving Security Access</b> Empl ID of User Receiving Security Access		

**Next** Pressing the Next button will directly transfer you into the Electronic Signature process

\* = Required field.

3. Choose the Access Type that the user needs (HR PeopleSoft, PageUp or Both)

Sherrell McNamara (HX87169) EMail-mcn

Useful Links - myUMBC DocuSign Fe

## Security Access

Requestor	<b>*Name</b> Sherrell McNamara	<b>*Email</b> mcnamara@umbc.edu
Department Approver	<b>*Name</b> Test Approver	<b>*Email</b> mcnamara@umbc.edu

If the User needs Payroll Preparer or Payroll Approver access only, please complete the Signature Authorization Form instead of this form.

<b>*Empl ID of User Receiving Security Access</b> Empl ID of User Receiving Security Access	<b>*Requested Access Type</b> --choose-- --choose-- HR PeopleSoft PageUp Both	<b>*Role Specifics</b> --choose--
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**Next** Pressing the Next button will directly transfer you into the Electronic Signature process

\* = Required field.

4. The requestor may specify whether they are requesting access for themselves or requesting for someone else. This selection is made in the Role Specifics dropdown box.

## Security Access

Requestor	<b>*Name</b> <input type="text" value="Sherrell McNamara"/>	<b>*Email</b> <input type="text" value="mcnamara@umbc.edu"/>
Department Approver	<b>*Name</b> <input type="text" value="Test Approver"/>	<b>*Email</b> <input type="text" value="mcnamara@umbc.edu"/>
<b>If the User needs Payroll Preparer or Payroll Approver access only, please complete the Signature Authorization Form instead of this form.</b>		<b>*Requested Access Type</b> <input type="text" value="--choose--"/>
<b>*Empl ID of User Receiving Security Access</b> <input type="text" value="Empl ID of User Receiving Security Access"/>		<b>*Role Specifics</b> <input type="text" value="--choose--"/> <input type="text" value="--choose--"/> <input type="text" value="I am requesting security access for myself"/> <input type="text" value="I am requesting security access for someone else"/>

Pressing the Next button will directly transfer you into the Electronic Signature process

\* = Required field.

- If the requestor selects “I am requesting security access for someone else”, a section labeled, “Requesting Access For” will appear. The requestor will need to enter the name and email address of the individual that needs the security access. Additionally, the requestor will need to enter the Empl ID of the

Requestor	*Name <input type="text" value="Sherrell McNamara"/>	*Email <input type="text" value="mcnamara@umbc.edu"/>
Department Approver	*Name <input type="text" value="Test Approver"/>	*Email <input type="text" value="mcnamara@umbc.edu"/>
<b>Requesting Access For</b>	*Name <input type="text" value="Name"/>	*Email <input type="text" value="Email"/>
<p>If the User needs Payroll Preparer or Payroll Approver access only, please complete the Signature Authorization Form instead of this form.</p>		*Requested Access Type <input type="text" value="--choose--"/>
		*Role Specifics <input type="text" value="I am requesting security access for som"/>
<p>*Empl ID of User Receiving Security Access</p> <input type="text" value="Empl ID of User Receiving Security Access"/>		

Pressing the Next button will directly transfer you into the Electronic Signature process

\* = Required field.

- Once the web form has been completed, the requestor may click on the Next button to proceed to the security access form.

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Pressing the Next button will directly transfer you into the Electronic Signature process

\* = Required field.

Once the requestor clicks on Next, they will be forwarded to the DocuSign form for completion and signature.

- The DocuSign form will auto populate various fields based on information entered on the web form. The requestor and employee's name, empl id, and campus id will be pre-populated. The form will auto select the access type (PeopleSoft, PageUp or Both) based on the access type selected during the completion of the web form.

For the appropriate access type, the requestor will need to select the applicable roles, enter the effective date and check the add or remove box. All required fields will be outlined in red.

below.

**FINISH**    OTHER ACTIONS







**HR PEOPLESOFT & PAGEUP ATS SECURITY ACCESS REQUEST FORM** 

**START**

REQUESTOR INFORMATION					
Requestor's Name	Sherrell McNamara	Title	<input type="text"/>	Phone	<input type="text"/>
Department ID	<input type="text"/>	Department Name	<input type="text"/>		
USER INFORMATION <input checked="" type="checkbox"/> (check box if requestor and user information are the same)					
Employee's Name	Sherrell McNamara	Empl ID	1000001285	Username/Campus ID	HX87169
Title	<input type="text"/>	Phone	<input type="text"/>		
USER PROFILE: Briefly describe the user's job as it relates to access to the HR Functional or PageUp Area:					
<input type="text"/>					
REQUESTED ACCESS TYPE					
	ROLE	EFFECTIVE DATE	ADD	REMOVE	
<b>HR PEOPLESOFT*</b> -HR/Payroll -Time Entry -Position Management -Commitment Accounting	Business Manager		<input type="checkbox"/>	<input type="checkbox"/>	
	Manager/Supervisor		<input type="checkbox"/>	<input type="checkbox"/>	
	Department Head		<input type="checkbox"/>	<input type="checkbox"/>	
	Division Head		<input type="checkbox"/>	<input type="checkbox"/>	
*If the User needs Payroll Preparer or Payroll Approver access only, please complete the Signature Authorization Form.					
PeopleSoft Approver: HR_Security Access PeopleSoft					
	ROLE	EFFECTIVE DATE	ADD	REMOVE	
<b>PAGEUP</b> -Recruitment -Applicant Tracking	Hiring Liaison		<input type="checkbox"/>	<input type="checkbox"/>	
	Hiring Manager (for additional PS department number access only)		<input type="checkbox"/>	<input type="checkbox"/>	
Reason for PageUp Access		<input type="text" value="-- select --"/>			
User will coordinate hiring for:		<input type="text" value="-- select --"/>			



Completed: Security Access for Keith McNamara-3000496955 DOCUSIGN (TEST) x

DocuSign for UMBC HR Security Access via DocuSign <dse\_na2@docuSign.net>  
to me ▾

# UMBC

AN HONORS UNIVERSITY IN MARYLAND



Your document has been completed

[VIEW COMPLETED DOCUMENT](#)

DocuSign for UMBC HR Security Access  
[dshrsecurity@umbc.edu](mailto:dshrsecurity@umbc.edu)

All parties have completed Security Access for Keith McNamara-3000496955.

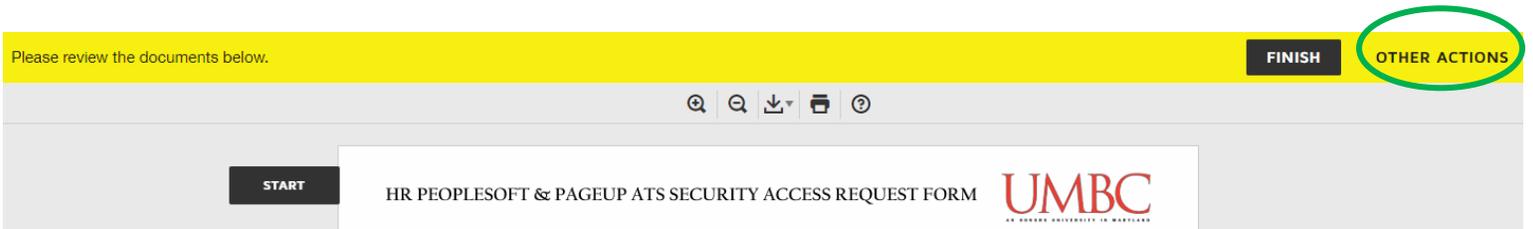
PRIVATE MESSAGE

This will serve as a copy of your responses to the security access form for your records.

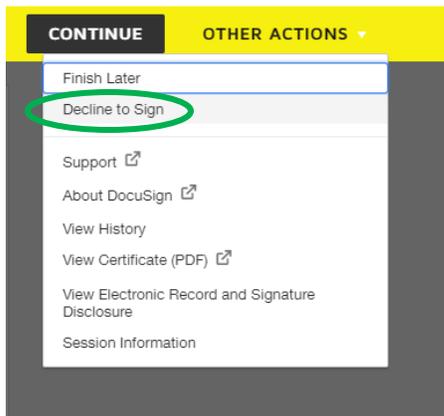
## II. DECLINE TO SIGN FEATURE.

If the requestor or approver needs to reject a request or stop the form from moving on to the next step, the requestor or approver (the person whose queue the form is currently in) may use the “Decline to Sign” feature to terminate the request.

1. While the form is in the requestor or approver’s queue, the individual in that role may access the form.
2. In the upper right corner, click on Other Actions.

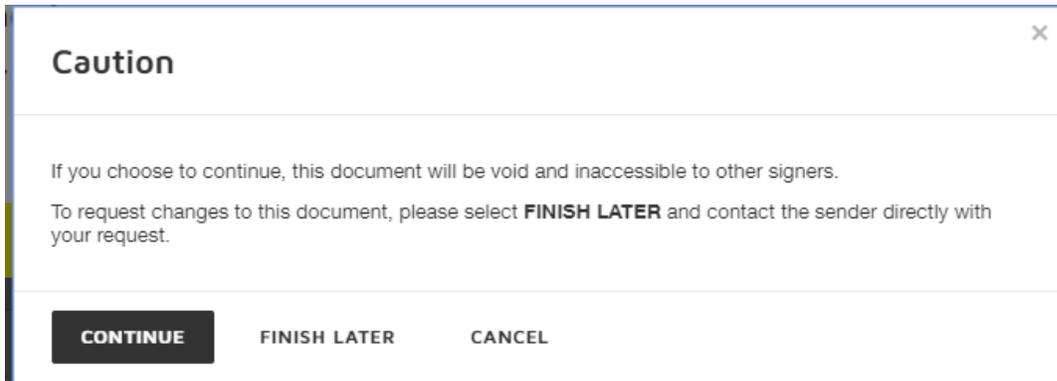


3. A dropdown menu will appear. Click on Decline to Sign.



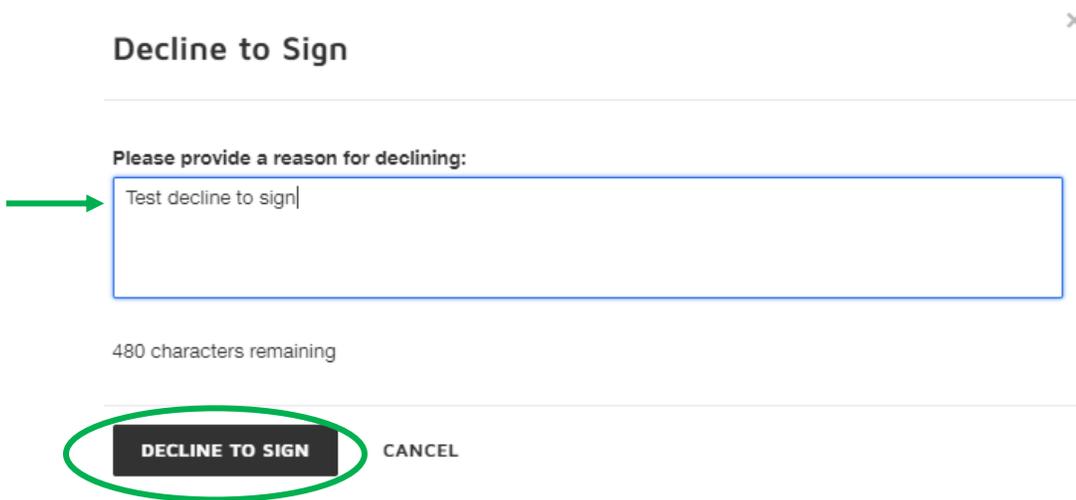
- Next, a 'Caution' box will appear. Click on Continue.

Note: If the user wants to stop the form but complete it at a later time, the user may select Finish Later. This will place the request in a holding status.



A dialog box titled "Caution" with a close button (X) in the top right corner. The text inside reads: "If you choose to continue, this document will be void and inaccessible to other signers. To request changes to this document, please select **FINISH LATER** and contact the sender directly with your request." At the bottom, there are three buttons: "CONTINUE" (highlighted in black), "FINISH LATER", and "CANCEL".

- The Decline to Sign box will appear. Type your reason for the decline in the box provided and click on the Decline to Sign button at the bottom.



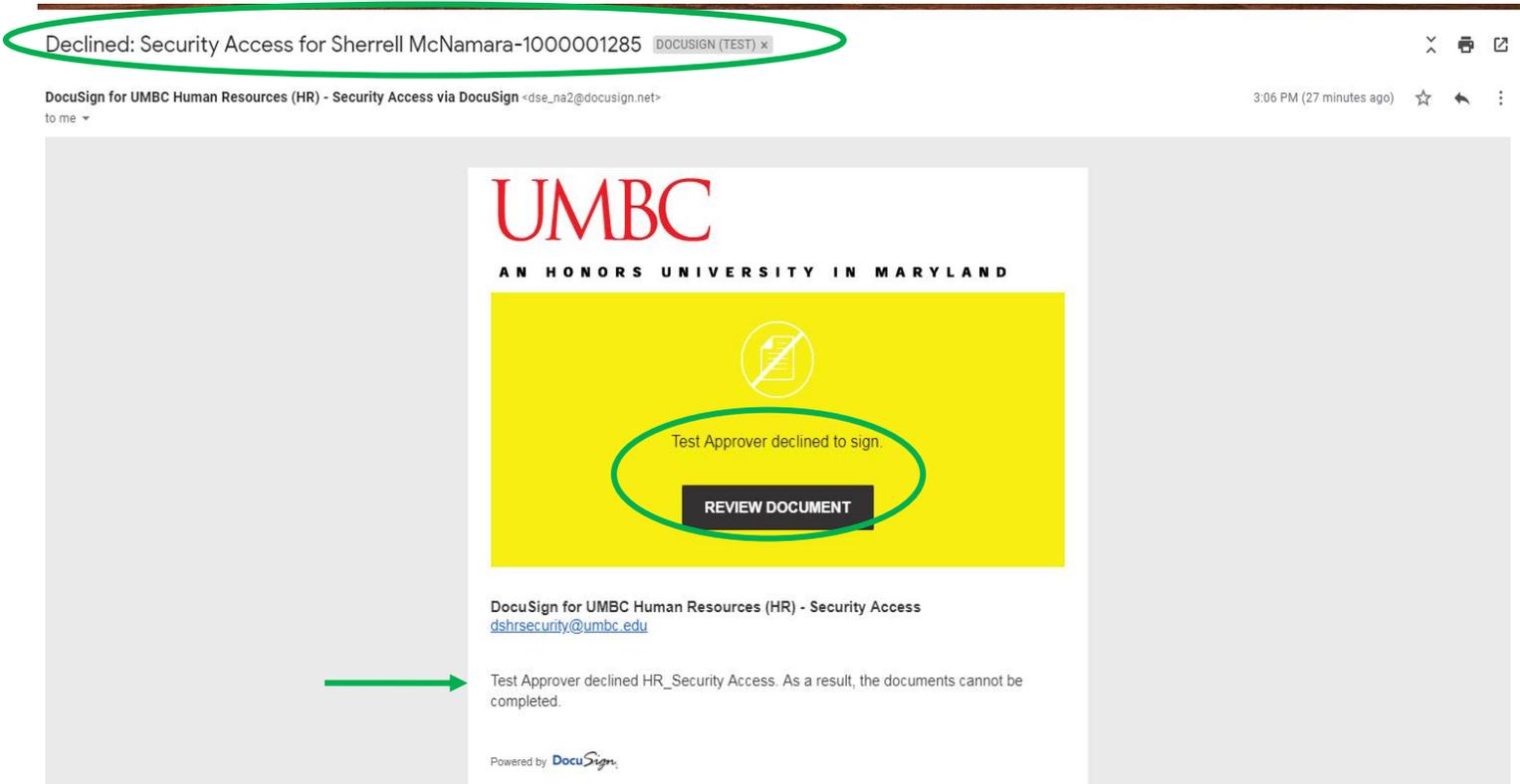
A dialog box titled "Decline to Sign" with a close button (X) in the top right corner. Below the title is a text input field with the placeholder text "Please provide a reason for declining:". A green arrow points to the input field, which contains the text "Test decline to sign". Below the input field, it says "480 characters remaining". At the bottom, there are two buttons: "DECLINE TO SIGN" (circled in green) and "CANCEL".

- The 'Thank you' page will appear. Now the request has been terminated and will not proceed to the next step of the review and approval process.



Thank you for using UMBC's Electronic Signature process.

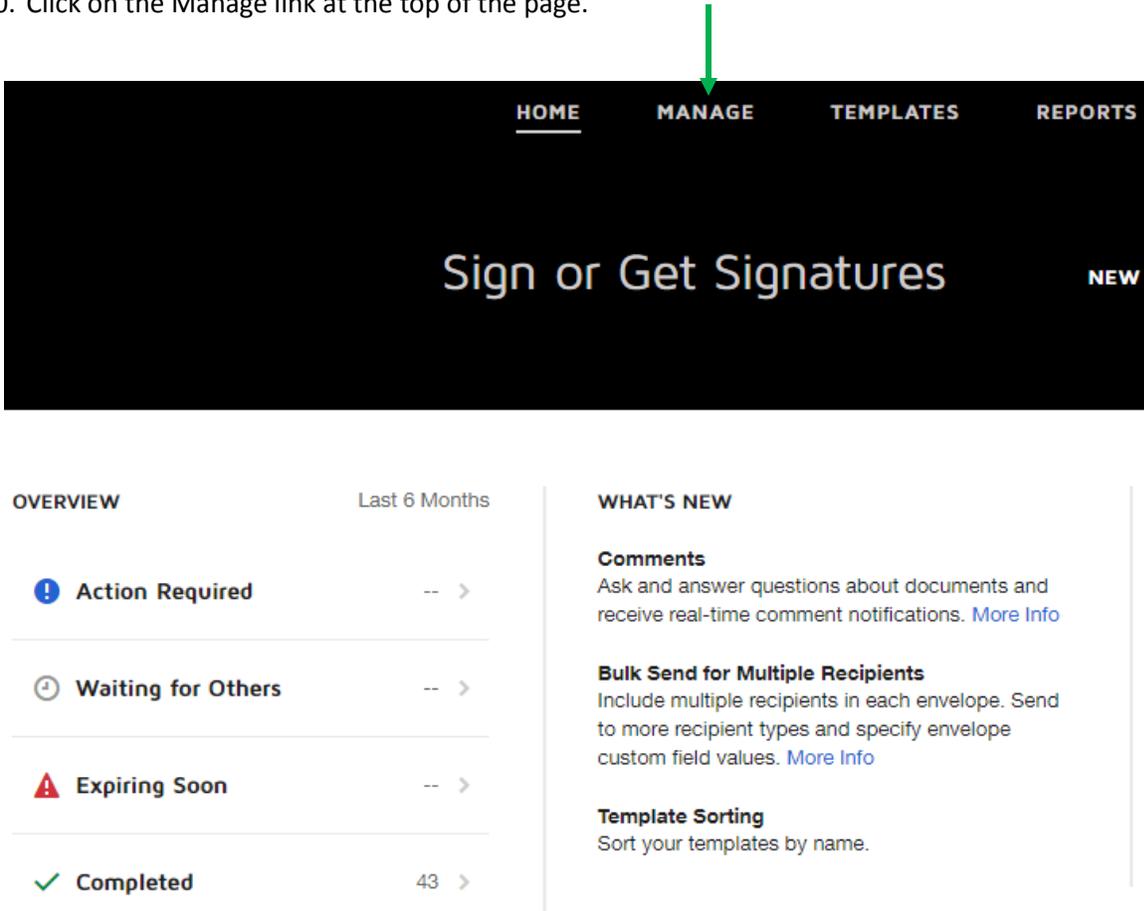
- The requestor will receive an email notification indicating that a decline to sign action was processed (inclusive of the person who declined to sign). This notification serves as an indicator that the request has been rejected.



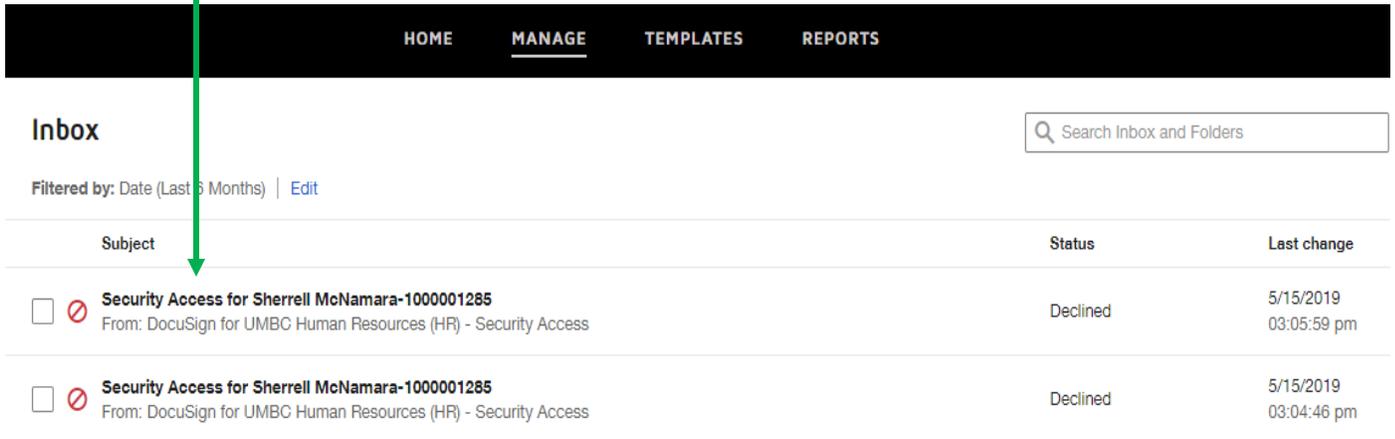
8. To view the specific reason why the form was declined, navigate to the menu. Click on DocuSign icon at the top.



9. You may be prompted to log into DocuSign.
10. Click on the Manage link at the top of the page.



11. The user will be forwarded to the DocuSign list page. Click on the link to the document you are looking for.



HOME <u>MANAGE</u> TEMPLATES   REPORTS			
Inbox		Search Inbox and Folders	
Filtered by: Date (Last 6 Months)   Edit			
Subject	Status	Last change	
<input type="checkbox"/>  <b>Security Access for Sherrell McNamara-1000001285</b> From: DocuSign for UMBC Human Resources (HR) - Security Access	Declined	5/15/2019 03:05:59 pm	
<input type="checkbox"/>  <b>Security Access for Sherrell McNamara-1000001285</b> From: DocuSign for UMBC Human Resources (HR) - Security Access	Declined	5/15/2019 03:04:46 pm	

12. A status page will display. A status of the request will be displayed at the top portion of the page. A red symbol with Declined will be displayed. Next will be the reason documented for the decline to sign.

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## Security Access for Sherrell McNamara-1000001285 ⓘ

From: DocuSign for UMBC Human Resources (HR) - Security Access  
Last change on 5/15/2019 | 03:05:59 pm  
Sent on 5/15/2019 | 10:37:22 am

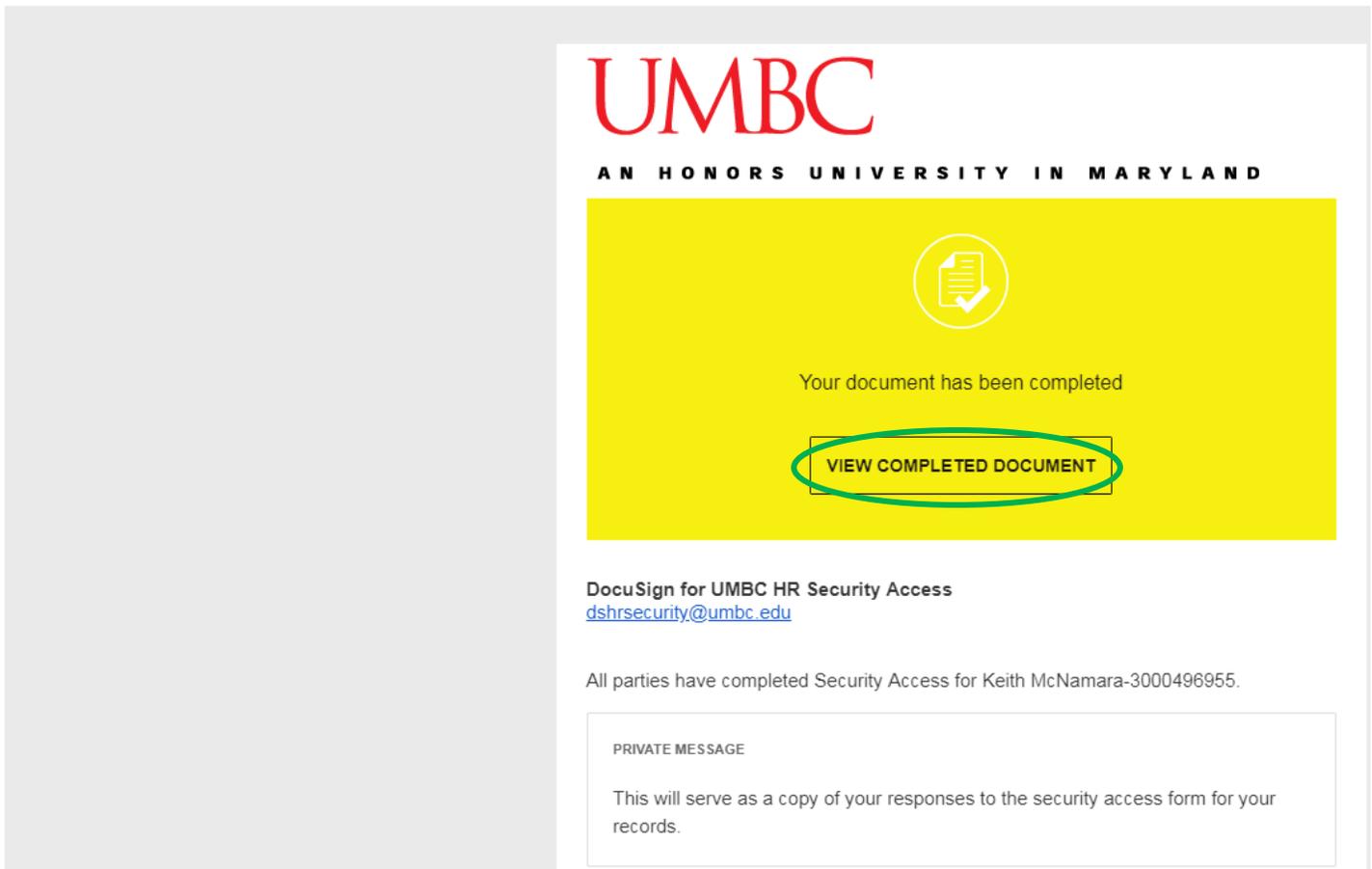
 **Declined - test**

### III. HR APPROVAL(S)

Depending on the security request type, the DocuSign form may be routed to the HR PeopleSoft approver, the PageUp approver or both. When a form has been submitted, and the request is for access to both systems, it is possible that access for one system may be approved but denied (declined) for the other. In this instance, the request form will be processed as Completed and **not** Declined to Sign. Declined to Sign is used when the **entire form** has been rejected. In consideration of this, requestors/users must view the **Completed** email notification and attachment (see the two screenshots below) to ensure that access to **both** systems (not just one) have been approved by HR.

**Completed:** Security Access for Keith McNamara-3000496955 DOCUSIGN (TEST) x

DocuSign for UMBC HR Security Access via DocuSign <dse\_na2@docusign.net>  
to me ▾



**UMBC**  
AN HONORS UNIVERSITY IN MARYLAND

Your document has been completed

**VIEW COMPLETED DOCUMENT**

DocuSign for UMBC HR Security Access  
[dshrsecurity@umbc.edu](mailto:dshrsecurity@umbc.edu)

All parties have completed Security Access for Keith McNamara-3000496955.

PRIVATE MESSAGE

This will serve as a copy of your responses to the security access form for your records.

REQUESTOR INFORMATION					
Requestor's Name	Sherrell McNamara	Title	Test	Phone	2222
Department ID	10274	Department Name	Police		
USER INFORMATION (check box if requestor and user information are the same)					
Employee's Name	Keith McNamara	Empl ID	3000496955	Username/Campus ID	keithmc
Title	test	Phone	456789		
USER PROFILE: Briefly describe the user's job as it relates to access to the HR Functional or PageUp Area: test PageUp and PS access					
REQUESTED ACCESS TYPE					
<b>HR PEOPLESOFT*</b> -HR/Payroll -Time Entry -Position Management -Commitment Accounting	ROLE	EFFECTIVE DATE	ADD	REMOVE	
	Business Manager				
	Manager/Supervisor	03/31/2019	X		
	Department Head				
	Division Head				
*If the User needs Payroll Preparer or Payroll Approver access only, please complete the Signature Authorization Form. Test decline for PS. Next action is for PageUp.					
PeopleSoft Approver: <b>Declined</b> Sherrell McNamara <i>Sherrell McNamara</i> 4/24/2019   4:00:32 PM EDT					
<b>PAGEUP</b> -Recruitment -Applicant Tracking	ROLE	EFFECTIVE DATE	ADD	REMOVE	
	Hiring Liaison	03/31/2019	X		
	Hiring Manager (for additional PS department number access only)				
<b>Reason for PageUp Access</b> New Hire into role					
User will coordinate hiring for:		Positions that report to other hiring managers within my department			
Approved for access to 10365, 10471 and 10688					
PageUp Approver: <b>Approved</b> Rosemarie Mahoney <i>Rosemarie Mahoney</i> 4/24/2019   4:42:45 PM EDT					
DEPARTMENT ACCESS FOR HR PEOPLESOFT OR PAGEUP					
PS Department ID	Department Name	HR PeopleSoft Access	PageUp Access		
10274	Police		X		
10412	Parking	X			
DEPARTMENT APPROVAL (Department Head, Division Head or Signature of Authority)					
Printed Name Sherrell McNamara		Signature <i>Sherrell McNamara</i>		Date 4/24/2019   3:58:48 PM EDT	

Submitted By: *SM* Sherrell McNamara

#### **IV. File Maintenance**

The Human Resources Department strongly encourages departments to maintain a copy of the Completed (processed) and Declined to Sign forms on file for reference. Storage of these file may be maintained electronically or via hard copy files—whichever is more efficient for the department’s workflow and need.