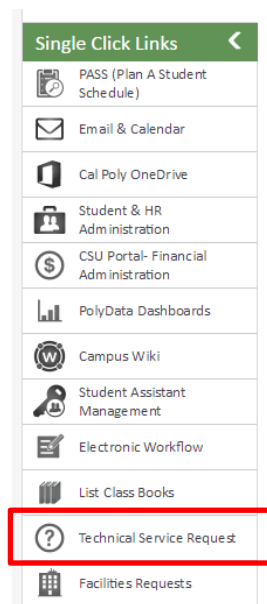
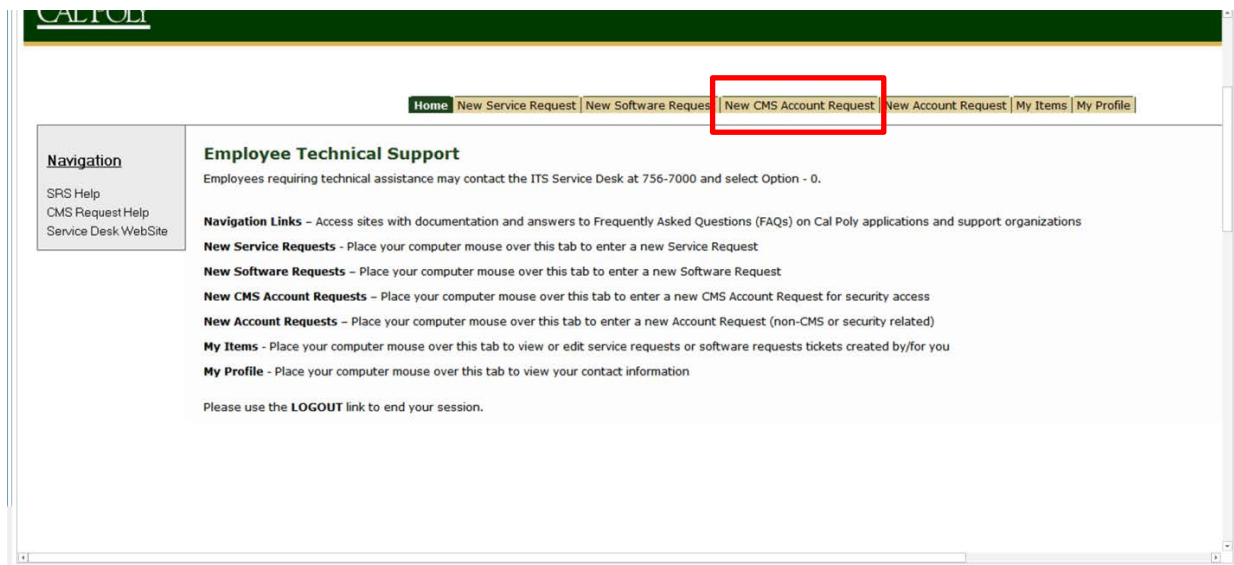


CMS Account Request – for Class Climate End User Access



Log in to the **Portal** and access the **Technical Service Request** program from the **Single Click Links** section.

Click the **New CMS Account Request** tab.



Step 1 of 2

Complete the required asterisked (*) and double asterisked (**) fields:

- Click radio button for Request Type **Add/Change/Remove (partial) current security**
- Enter Summary **"Grant access to Class Climate"**
- Enter your User ID and click **Lookup Recipient** button
- Enter Dept Head User ID and click **Lookup Approver** button
- Click **Proceed to Step-2** button

CMS Account Request

Save	Cancel	Step 1 of 2 - Request Details	Step 2 of 2 - CMS Role Details	Request Summary	View
-------------	---------------	--------------------------------------	--------------------------------	-----------------	------

Request Details - [click here for HELP](#)
1. Enter all required information and then click Proceed to Step-2 (at bottom of page).
2. To save your work before proceeding to Step-2, select the Save button. You can then open the request.
3. * means field is required

CMS Request ID 14515
Status

Request Information
NOTICE: This form is for CMS (Student, HR Administration, and Finance) and Cal Poly Jobs accounts only. If you are requesting an account for the Advance application, please submit an "Account Requests" ticket.
Select the CMS Account Request type:
*Request Type ☐ New User
☒ Add/Change/Remove (partial) current security
☐ Remove (ALL) current security
☐ Other - describe in description
Enter short description of request (e.g.; New CMS Request -- jmustang):
*Summary
Staff CCs

Recipient Information - Individual receiving access
Enter the Recipient's Cal Poly Username (e.g. jmustang): Click Lookup Recipient after entering Username
*Username **Lookup Recipient**
Full Name Cami Reece Email careece@calpoly.edu
Dept ID 115400 Role State Staff
Dept CSM-Mathematics Phone 805/756-1227
Person Type state staff

Approver Information - Individual approving access for Recipient
1. ** MUST be filled-in before proceeding to Step- 2
2. Approver must have the role Head of Department or higher and must be available to approve request
Enter the Approver's Cal Poly Username (e.g. jmustang): Click Lookup Approver after entering Username
Approver Username **Lookup Approver
Approver's Name Joseph Borzellino Approver's Phone 805/756-5192

Requestor Information - Individual requesting access for Recipient

Step 2 of 2

- Click the radio button for **CMS PeopleSoft Human Resources**
- From the Dept ID access drop-down menu select **No change in department access**
- Click the radio button for **Human Resources and Academic Personnel**
- From the Recipient's position Dept. type select **Academic Department**
- From the Recipient's position role/responsibilities drop-down menu select **Primary Employment Specialist-Acad.**
- "Check" the box to ADD the **SLO_AP_EUCLASS_CLIMATE** role.
- Click **Submit for Approval** button

CMS Account Request - Step 2 of 2 - CMS Role Details - [click here for HELP](#)

1. Expand the section(s) needed below and then select the role(s) required
2. Enter all required information and then click Submit for Approval (at bottom of page).
3. To save your work before submitting for approval, select the Save button. You can then open the ticket later to complete request.

CMS PeopleSoft Financials - includes Budget and Purchasing

☐ <-- Select to expand PeopleSoft Financials

CMS PeopleSoft Student Administration - includes Admissions, Student Records, Academic Advising, Student Financials & P

☐ <-- Click to expand PeopleSoft Student Administration

CMS PeopleSoft Human Resources - includes PS and Dashboard Employee Job, Personal, Contract & Educ. Info., PS LCD, PS I

☒ <-- Click to expand PeopleSoft Human Resources

Dept ID access change required (MUST BE COMPLETED for HR, LCD and Payroll access)

No change in department access

Human Resources and Academic Personnel

☒ <-- Click to expand PeopleSoft/Dashboard Job, Personal, Contract & Educational Information

Recipient's position Dept. type:

Academic Department

Recipient's position role/responsibility:

Primary Employment Specialist-Acad

NOTE: ONLY SELECT ONE CHOICE (Add/Remove) PER ROLE.

Click the Add box for the role(s) you approve for this recipient.

Click the Remove box for the role(s) you want to remove for this recipient.

ADD	REMOVE	Role Name	Role Description
<input checked="" type="checkbox"/>	<input type="checkbox"/>	SLO_AP_EUCLASS_CLIMATE .	Manage Class Climate pages by colleges and department staff

An email notification will be sent to the Approver with instructions and link to approve request. Once the request is approved a task will be created for the HR/AP Security team.

If you have any questions or issues opening the ticket feel free to contact Chris Blackburn at x5281, Amanda Duda at x2829 or Jen Myers at x6569.