DWA Security Requests - How to use this Form

DWA Security Request is for additional access Roles and functions commonly required at school sites and departments. In addition, requests for Contractors or Temps, known as a POI (Person of Interest), who require access to district resources. The form is found in PeopleSoft › HCM › Self Service › DWA Security Request. Below are step-by-step instructions:

1. In the **Submitter** section, you will see your Empl ID and Name determined by PeopleSoft sign in. Fill in the required fields: Phone number, Email and Dept, if not already shown

   **Submitter**
   
   | Empl ID: 100002 | Name: Smith, John | Administrative Asst I |
   | *Phone: | *Email: jsmith@sandi.net | Dept: 5821 |

2. In the **Approver** section, fill in the required fields for the Administrator/Principal or Supervisor who will be approving this request.

   **Note:** If you do not know your approver’s employee ID number, click on the magnifying glass next to the Empl ID field and search by last name.

   **Approver**
   
   | *Empl ID: | Name: | Alt Email: |
   | *Phone: | Email: | Org Relation: | Dept: |

   *Approvers must be an Administrator, Principal or Supervisor. A confirmation email is sent to the Approver upon submission of this request. Requests are processed after a confirmation reply via email is received.*
3. In the Request Details Section, type in any relevant information that will help in clarifying this request.

For example, include the Empl ID or name of someone who has the same permissions level being requested. Or, include background information or the reason for a new POI request.

**Request Details:** List any necessary information for the DWA or POI request below:

4. For the Request section, you select whether this is a request for Oracle Reporting Business Intelligence Technology (ORBIT), or for an Employee DWA permissions request, or a POI/Contractor account request.

   *Is this request for Oracle Reporting Business Intelligence Technology (ORBIT)?*
   
   - [ ] Yes this is ORBIT Security Request

   **Requested User:** (Select who this request is for)
   
   - [ ] Employee
   - [ ] Person of Interest (POI)

   **If you select Employee, continue with Step 5.**
   **If you select Person of Interest (POI), proceed to Step 10.**
   **If you select ORBIT, proceed to Step 15.**

5. In the Requested Role(s) section which appears after selecting Employee, you will fill out the employee(s) that are requesting security access and type of access.

   **See the ROLE definitions [here](#)**
Fill in the required fields. In **User ID**, type in the employee’s ID number (or use search option), then hit Tab key. Type in the **User Dept** the employee is assigned if it doesn’t automatically fill in. Choose a **Reason for Change** using the drop down arrow.

**Note: To view the Role definitions, click the here link. Also available on the Roles search page below.**

6. Next, click on ROLES link as shown above for the Roles search page. Click on the magnifying glass next to the **Role Name** field in order to list all available roles.

Please see the Role definitions [here](#).

<table>
<thead>
<tr>
<th>Role Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
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</tbody>
</table>

7. From the **Look Up Role Name** list, choose the correct role needed by clicking on the blue hyperlink.

**Note:** Selection of at least one Role is required. If unsure, select **ROLE_Other** and explain further in Details section (step 3 above).
8. If more than one "Role" needs to be entered for that employee, click on the + button to add in another row. Then repeat steps 6 and 7 to add another role name for the same Emplid request. When you are finished, click OK.

9. Likewise for Requested Roles, if you need to request an additional Employee for security access then click on the + button and another row appears. Repeat the necessary steps above to complete the additional employee request row.
10. Select whether this is for a New POI account, or for requesting changes on an existing POI account. For a New POI also indicate if the person is a former district employee, in which case their prior Emplid will be used again for them and reactivated.

For a New POI and Yes a former SDUSD employee, enter the persons district EmplID or search for it by Name using magnifying glass.

or...

For a New POI and Not a former employee, EmplID is not relevant so is not presented.

or...
For a Current POI, their POI EmplID is necessary along selecting a Reason for Change. For Extension or Termination only End Date becomes modifiable.

11. Complete the rest of the required fields as needed. Enter the Department number the POI will be working for. Their SSN is required, this becomes a suppressed field after entry, only last four of SSN is sent in the email to Approver. SSNs must match correctly for former district employees.

12. Indicate the Job Type or Title for the POI. Selecting (Other) prompts you to fill in Job Title. Otherwise Office, Principal, Teacher can be used for equivalent school or charter site positions, these become relevant for accessing the Cognos system.

13. An Ending date is required for a POI. The account will automatically be suspended on this date.

14. For additional POI requests if needed, click the + plus sign as indicated below.
Oracle Reporting Business Intelligence Technology (ORBIT) requests. Use this option to request new or changed access to ORBIT. ORBIT Requests can be made for employees or POIs (Contractors, Temps, Charter School employees, former district employees).

15. Select the checkbox for "Yes this is ORBIT Security Request". In the Oracle Reporting Business Intelligence (ORBIT) section which appears after selecting "Yes", you will fill out the employee(s) and/or POIs that are requesting ORBIT access and type of access.

In **User ID** enter the employee ID of the employee or POI for whom ORBIT access is being requested. In **Change Type** select "A" or "R" to request that access be added (A) or removed (R). In **Group ID** select the type of ORBIT access that is being requested. Click the magnifying glass and choose from the list. Some Group IDs require a department or location. If the **Department** field or **Location** field becomes available for editing, please enter the department or location for which this person should have ORBIT access.

To request additional ORBIT Group IDs for the person, click the + button at the right and complete the additional row. Repeat as necessary.

To request ORBIT access for another person (employee or POI), click the + button and in the new row enter the other person’s employee ID and complete the remaining fields as described above. Repeat as necessary for this person or additional people.

**ALL REQUESTS (Employee, POI, ORBIT)**
16. When you have completed the online form and checked it over thoroughly, click Submit Request at the bottom of the form.

Submit Request

A confirmation will be displayed.

Submit Confirmation

Your requests have been successfully submitted.

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