



# The UNIVERSITY of OKLAHOMA

## How to Review Security for ePAF Routing

(as of 1/29/2021)

In PeopleSoft, security has two components – the department and the role. The department defines the group of employees that a user can see. A role defines the pages and actions they can use for those employees. For ePAF, the role allows a user to prepare or approve eforms. HR Records and OU IT Security work together to make these assignments for users.

There are three overlapping layers of security assignments for ePAF. This allows ePAF access to be very granular, but it also makes it somewhat complex.

1. **Primary Security:** The security for most users is managed completely through their primary department security. Use this query to review primary security: ***OUDR\_EPAF\_PRIMARY\_SECURITY***
2. **ePAF Security Override** – After a user has been given the appropriate *initiator* role, GT Security Override allows a user to serve as initiator for more or fewer HR Dept IDs than they have on their primary department security. This setting also determines what the user can see in the ePAF Search screens. If “Override Dept Security” is Yes in this query, then the indicated departments replace the primary department security for the purpose of ePAF initiation and search. Use this query to review Security Override settings: ***OUDR\_EPAF\_SECURITY\_OVERRIDE***
3. **ePAF Workflow Override** – After a user has been given the appropriate role, the Workflow Override allows them to serve in that role for more or fewer HR Dept IDs than they have on their primary department security. If “Override Dept Security” is Yes in this query, then the indicated departments replace the primary department security for the purpose of ePAF workflow. Use this query to review Workflow Override settings: ***OUDR\_EPAF\_WORKFLOW\_OVERRIDE***

## How to Make Changes

Your college or director’s office must approve new or updated security. Approval by email will be accepted.

During this transition, many changes may be needed. If that is the case in your area, please work with your college or director’s office. Instead of submitting a separate form for each person, your college or director’s office can make changes on the above spreadsheets and submit the spreadsheets to [CompassQuestions@ou.edu](mailto:CompassQuestions@ou.edu). (Be sure the changes are clearly indicated. Thanks!) If you only need a change for one person, you may use the *Security Request Form* here: <https://ou.edu/compassproject/deptusers>.

Need other roles? While we await updated security request forms with all the new roles (the queries above only show ePAF), describe the new access you need using the form at the link above.

**Best Practices for ePAF Security:** Individuals should only have one role in the approval routing. Initiators should not also be approvers.