

PeopleSoft Financials / EFS
access request
 November 29, 2016

CENTRAL BPO ACCESS

Requester demographic information (all fields in this section are required unless noted)

Name (Last, First, M.I.)		Internet ID	Cluster ID / PO Origin code	
Department name		DeptID (5 digit code)		
Campus mail address		Mail Code	EmplID or Student ID number	
Business phone with Area Code	Business Fax with Area Code	Employment status (check only one) Staff Faculty Student worker Contractor Temporary staff		
Previous department (if applicable)		Date of transfer from previous department (if applicable)		

Statement of business need for this access. Access to data and systems is granted based on job needs. Summarize the types of data or information needed as well as the types of work performed (view, enter, verify, approve, etc.). Also use this space to request a specific access role by name if not listed elsewhere on this form.

You agree to comply with University policy and handle private data according to University standards. You will not share your ID/password nor will you log in and allow others to use the access.

These boxes should be completed when requesting ePro or Purchasing module access:

Receiver, requisition & UStores preparers and procurement specialists Default Ship To Location (usually begins with P): Default Asset Location code (REQUIRED): <table border="1"> <tr> <td>Phone number to be printed on POs:</td> <td>Fax number to be printed on POs:</td> </tr> </table> Internet ID of your procurement specialist:		Phone number to be printed on POs:	Fax number to be printed on POs:	Requisition & UStores preparers Internet ID(s) of those for whom you need to act as a backup requisition preparer/receiver:	Procurement specialists	
		Phone number to be printed on POs:	Fax number to be printed on POs:			
		Internet ID(s) of your backup procurement specialist:				
		Internet IDs of requisition preparers for whom you will be sourcing POs:				
Location code (address to be printed on CPSs):						

PRODUCTION QUERY JOB DUTIES (SELECT ONLY ONE):

- Query Viewer (run queries only—least amount of access)
 - Query Manager (includes Query Viewer and create queries)
 - Query Viewer but also allowed to see TREASURY data
 - Query Manager but also allowed to see TREASURY data
- Note that all central users get **reporting instance** Query Manager.*

BASE INQUIRY ACCESS GRANTED TO ALL USERS:

- DWFS and DWEF in data warehouse and Perceptive Content inquiry

AP/EX JOB DUTIES:

- 1042S Tax Analyst
- 1099 Processor
- Disbursements Expenses Admin (also get Perceptive Content roles *)
- Disbursements Payables Admin (also get Perceptive Content roles +)
- Vendor Correction
- Vendor Specialist
- Vendor Specialist (with UMNIS)
- Voucher Specialist (Central)
- Voucher Specialist (Student Finance & Acctg Svcs ONLY, Bus.Unit UMNSF)
- Speedchart Correction

AP/PO JOB DUTIES:

- Payables Admin (*for Recurring Voucher Contracts*)
- ProCard Administrator & PCard Year End admin

PO JOB DUTIES:

- Asset Management Administrator
- Central Purchasing Administrator (also get Perceptive Content roles #)
- Central Purchasing Year End admin
- Central Purchasing Buyer
- BCED Reporting

BUDGETS JOB DUTIES:

- Budget Office

PERCEPTIVE CONTENT JOB DUTIES: (FORMALLY IMAGENOW)

- 1099 Report Admin access +
- Admin Access for Dept Deposits
- Cash Adv Report Admin access *
- Expense Report Admin access *
- F Helpline (for help desk only)
- PCard App Admin access # (includes PCard Billing & Disputes)
- PCard Report Admin access #
- Stop Payment Admin access
- Vendor Request Admin access +
- Vouchers Admin access +
- F GL Journal Admin

CENTRAL APPROVAL JOB DUTIES:

Requisition Approvals (check only one):

- Associate Controller
- Facilities Management
- Payroll
- SPA
- Tax

Travel and Expense Approvals for:

- Accounting Services
- Disbursement Services

Voucher approval (central voucher approval pool, includes DS and AS staff)

Emergency approver, includes all transactions types

Journal Entry Approvals, Central Pool (*need Accounting Svcs director approval*)

ASSET MANAGEMENT JOB DUTIES:

- CIP Accountant
- Configuration Maintenance
- Month End Close Processor
- Physical Inventory Processor
- Supervisor
- Transaction Processor

GL JOB DUTIES:

Allocation Rule Maintenance
 Central Maintenance
 Change Journal from Journal Generator
 ChartField Maintenance (COA form central role)
 COA Maintenance Correction (COA form central role)
 Combo Edit Maintenance
 Commitment Control Maintenance
 Journal Spreadsheet Upload
 Tree Maintenance
 UM PT nVision (nVision in production)
 UM PT Tree Viewer (view trees in production)
 Unclaimed Property (additional approval needed: HR & SPA)

GRANTS PROJECTS & CONTRACTS JOB DUTIES:

Award Setup/Contract Entry
 Certification Maintenance
 Department Maintenance
 EGMS PRF Interface
 F & A Maintenance
 Grant Maintenance CFDA
 Grant Maintenance Invoice Form
 Grant Maintenance Report Form
 Grant Maintenance Sub Audit Info
 Institution Maintenance
 Key Words Maintenance
 PI Maintenance
 PO Entry for SPA Grant Administrators (aka P.O. Express)
 SFR Accountant
 SFR Contract Close
 SFR Journal Approver
 SFR Super User
 SFR/AR Accountant
 SPA Analyst
 SPA Front Desk
 SPA Grant Admin
 SPA Manager
 SPA Super User
 SPA Support
 Sponsor Maintenance
 Subrecipient Maintenance

AR/BI JOB DUTIES:

AR Collections Configuration
 AR Configuration maintenance
 AR Deposit Distributed (end user buy highly restricted)
 AR Director
 AR Supervisor (includes deposit approval)
 AR/BI Administrative
 BI AR Setup Administrator Support
 BI Config Maintenance
 BI Specialist – Central
 BI Specialist – Advanced (end user buy highly restricted)
 Billing Spreadsheet Upload
 Cashier
 Collector
 Credit Analyst
 Customer Administrator (*includes Cust Maint Approver & Cust Maint Requester*)
 Customer Maintenance Requester
 Payment Application Specialist

AR/BI USER PREFERENCES

Business Unit UMN01 (Non Sponsored)
 Business Unit UMSPR (Sponsored)
 HIPAA Access

TREASURY & ENDOWMENTS JOB DUTIES:

Accounting Analyst
 Bank Administrator
 Bank Analyst
 Bank Specialist
 Cash Desk
 Cash Manager
 Department Initiator
 Endowment Analyst
 Endowment Manager
 Internal Debt Analyst
 Investment Analyst
 Investment Manager
 Reconciliation Manager
 Reconciliation Specialist
 TR Business Analyst
 Vault Transfer Specialist

MODULE/CUSTOMER SUPPORT JOB DUTIES:

Module Support Team access (business analysts)
Module Support Team access (team leads)
Module Support Team access (director)

EFS Customer Support inquiry (for help desk)
EFS Customer Support workflow admin roles (UM AP Cntrl Workflow Admin, UM WF AP Cntrl Workflow Admin, UM EX Cntl Workflow Admin, UM WF UMN Workflow Admin, UM PV Workflow Admin, UM PV Workflow Maint)

INTERNAL AUDIT JOB DUTIES:

UM EFS Auditor (including inquiry access)

Notes (for access review in CO/OIT use)

Signatures

Individual requesting access (required for ALL requests):

REQUESTER PRINTED NAME:	SIGNATURE:	
EMAIL ADDRESS:	PHONE NUMBER:	DATE:

BPO or Supervisor of individual requesting access:

BPO OR SUPERVISOR PRINTED NAME:	SIGNATURE:	
EMAIL ADDRESS:	PHONE NUMBER:	DATE:

Controller's Office Authorization (required for ALL requests):

CONTROLLER'S OFFICE DESIGNEE: (CHOOSE ONE)	SIGNATURE:	
MIKE VOLNA VOLNA001@UMN.EDU		
SUE PAULSON SPAUL@UMN.EDU		
CARRIE MEYER C-MEYE1@UMN.EDU		
CRISTA ENDO CENDO@UMN.EDU		
MARIE HAGERTY HAGER001@UMN.EDU		
	PHONE NUMBER:	DATE: