

**AUXILIARY FINANCIALS ACCESS REQUEST FORM****1. USER INFORMATION:**

**USER TYPE:**                STAFF                                STUDENT                                TEMP  
**BUSINESS UNIT:**        NRTUC – The University Corporation                                NRUSU – University Student Union, Inc.  
  NRASI – Associated Students, Inc.                                NRFDN – Foundation

**ALL FIELDS ARE MANDATORY, EXCEPT OPERATOR ID.**

Name: Last: \_\_\_\_\_ First: \_\_\_\_\_ Mid Initial: \_\_\_ Employee ID #: \_\_\_\_\_  
Job Title: \_\_\_\_\_ Operator ID#: \_\_\_\_\_  
Email: \_\_\_\_\_ Extension: \_\_\_\_\_ Effective Date: \_\_\_\_\_  
Dept. Name: \_\_\_\_\_ Dept. ID #: \_\_\_\_\_

**2. REQUEST:**                New Access                                Modify Access                                Remove All Access

**3. APPLICATIONS: Check all that apply.**

General Ledger                Accounts Payable                                Asset Management                                Accounts Receivable/Billing  
Purchasing                                Grants                                People Tools                                Inquiries/Reports                                Reporting Tools

**4. ROLES: Check all that apply. All grayed boxes are required. (\* Requires VP Signature)**

<b>ADD    Delete    General Ledger:</b> GL Configuration ( <i>Restricted Role</i> ) GL Chartfield Configuration ( <i>Restricted Role</i> ) Open Period Maintenance Conversion Code Add Create Journals Online Import Journals Process Journals/Batch Process Post Journals/Batch Process Journal Generation ( <i>Limited Role</i> ) Create Allocations Maintain Allocations Process Allocations Benefactor Interface ADP Interface Speedtypes GL Bank Recon Ledger Close ( <i>Limited Role</i> )	<b>ADD    Delete    Accounts Payable:</b> AP Configuration ( <i>Restricted Role</i> ) Create Control Groups Create Vendors* Approve Vendors* Correct Vendors ( <i>Restricted Role</i> ) AP Home Page Enter Vouchers Budget Check Vouchers/Batch Process (BCM) Post Vouchers/Batch Process Create Checks - Paycycle Approve Paycycle ( <i>Limited Role</i> ) Post Payments/Batch Process Process 1099 Withholding* AP Bank Recon
<b>ADD    Delete    Purchasing:</b> PO Configuration ( <i>Restricted Role</i> ) Enter Purchase Orders Approve Purchase Orders Process Purchase Orders Receiving Enter Requisitions Approve Requisitions	<b>ADD    Delete    Grants:</b> Create/Process Grants
<b>ADD    Delete    Asset Management:</b> AM Configuration ( <i>Restricted Role</i> ) Create Asset Transactions Run Asset Processes Load Asset Interfaces Create/Maintain Inventory Assets Asset Service & Repair Capital Acquisition Planning	

Name: Last: \_\_\_\_\_ First: \_\_\_\_\_ Mid Initial: \_\_\_\_\_ Employee ID #: \_\_\_\_\_

**ADD Delete Accounts Receivable/Billing:**

- AR Configuration (*Restricted*)
- Collections
- Create/Maintain Customers
- Generate Invoices
- Create/Maintain Bills
- AR Maintenance
- Create/Apply Payments
- Maintain Pending Items
- Update Receivables

**ADD Delete Inquiries/Reports:**

- GL Inquiry Reports
- AP Inquiry Reports
- AP Vendor Inquiry
- PO Inquiry Reports
- AM Inquiry Reports
- AR Inquiry Reports
- Conversion Code Inquiry
- BBA Inquiry
- Detail Trial Balance
- PO Activity Report

**ADD Delete People Tools:**

- Edit Password and Favorites
- Process Monitor
- Tree Manager (*Limited Role*)
- Tree Viewer
- Web Libraries
- AUX Portal

**ADD Delete Reporting Tools:**

- Query Manager
- Query Viewer
- Nvision
- Nvision Drill Only

ADDITIONAL NOTES: \_\_\_\_\_

**PRINT DOUBLE SIDED IF POSSIBLE. RETURN COMPLETED FORM TO SOLAR FINANCIALS – AUXILIARY GATEKEEPER - MD-8337**

## 5. APPROVALS:

**Supervisors and Accounting Managers:** My signature certifies that the employee requires access to data within the PeopleSoft system to perform their job duties. I understand that it is my obligation to ensure that adequate training is provided to the employee in compliance with state and federal laws and University policies governing access to information contained in employee, applicant and student records.

Applicant's Supervisor: Print: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Extension: \_\_\_\_\_

Accounting Manager : Print: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Security Gatekeeper: Print: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Extension: \_\_\_\_\_

Security Administrator Print: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## 6. APPROVAL OF ROLES ACCESSING CONFIDENTIAL INFORMATION:

VP, Finance & Administration: Print: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_