INSTRUCTIONS FOR FINANCIAL SYSTEM SPECIALIZED ACCESS REQUEST FORM

ALL INFORMATION MUST BE COMPLETE AND LEGIBLE FOR THE REQUEST TO BE PROCESSED.

(1) Request Date: Fill in the current date.
(2) Dept #: Fill in the 5-digit PeopleSoft department number.
(3) Dept. Name: Fill in the PeopleSoft department name.
(4) Is this person paid from the University's payroll system? (Answer only for new ID) If the individual is paid from the University's payroll system, check “Yes” and provide the person's employee ID (obtained from your department's payroll/personnel liaison). If the person is not paid from the University's payroll system, check “No.”
(5) Name: Fill in the user's full name.
(6) User log in. This is your Novell log in.
(7) Phone Number: Please enter the phone number at work where the person is most likely to be reached.
(8) Email Address: Provide the person's complete UMBC email address; for example, SSmith@umbc.edu.
(9) ACCESS INFORMATION
   Access Permission Groups
   More information about the capabilities provided by each access permission group is provided below.

SPECIALIZED FINANCIAL SYSTEM ACCESS PERMISSION GROUPS

Department Row Level Security
In this section, add the department values or tree node values for which a user will be authorized to create new charges. Users with appropriate page-level access will be able to charge these departments on Journal Entries and Requisitions, and will be able to receive goods for requisitions with these departments. Multiple values can be added for each user. Adding department detail values (lowest level on the tree) will give the user access to only that department. Adding tree node values (higher level “branches” within the tree) will give users access to the department at that node and all departments at lower levels within that branch of the tree.

A copy of the tree is attached. A full list of Departments can also be viewed with the TREE VIEWER. The tree name is CC_Departments. The user can also contact the Financial Services Support team or the MAC representative for the user’s department.

Reporting

Retriever - – This role will have access to view data within Retriever.

General Access – This role will have access to run predefined Queries, Crystal Reports and N/Vision reports via report manager. This role cannot modify reports.
Financial System Access

**Tree Viewer** – This role provides the user with view access to all trees. The user will not have authority to modify any trees.

**FAS Account to PeopleSoft ChartField String Map** – This role will have access to the custom page that will provide the new PeopleSoft ChartField string based on entering an eight-digit FAS account number.

**General Ledger**

**General Ledger View Only** – (Most common user) This role provides access to view all journal entries and the Actuals’ ledger activity. This user will have access to general use reports and view trees.

**Create Actual Journal Entries (Basic)** - (Next most common user) This role provides access to create and copy, save and approve journal entries. This role will not be allowed to post journals.

**Create Journal Entry Standard Entries** – This role provides access similar to basic entry with the exception that the user will be able to process Standard Journals. Standard Journals are used to create recurring templates for accounting period spread entries.

**Create Excel Journals** – The user will also be able to load spreadsheet journal entries.

**AP**

**AP Inquiry User** – The user granted this role will inquire on vouchers (invoices and similar payment documents) that are being processed for payment by the Accounts Payable section. The user granted this role will use the Document Status Inquiry screen in the Vouchers menu component to search for a voucher by invoice number or vendor short name.

Once the requested voucher has been selected from the search component, the user can view the voucher ID, the amount, the invoice number and date, the vendor name and ID and related payment information if this voucher has been processed through the pay cycle on PeopleSoft.

NOTE: Fields in PeopleSoft that are titled “payment” information do not relate to payments disbursed by the State of Maryland, but they equate to UMBC transferring the voucher to the State for audit and subsequent payment (usually about 7 days later).

**Purchasing**

**Campus Procurement Inquiry** - Users granted this role will have the ability to inquire on Vendors, Requisitions, Purchase Orders, Receipts and Vouchers in order to follow a transaction as it progresses through the procurement cycle.

Additional Notes about PO Roles for the Campus:

1. The same user may be granted the roles of both Requisition entry and receiver, or the roles of both Requisition approver and receiver, but no user will ever be granted the roles of both entry and approval for Requisitions.
2. Because PeopleSoft uses Requesters on Requisitions, and Requesters cannot approve their own
Requisitions, there will always be at least 3 people required to complete a Procurement transaction.

Campus Requisition Entry User – The user granted this role will enter Requisitions for one or more Requesters,
including the user him/herself in some cases. The user will also be able to update unapproved existing
Requisitions. The user will also be able to cancel or delete entire Requisitions, Requisition Lines, Schedules or
Distribution Lines, subject to PeopleSoft parameters for these functions. Note that Users will not be authorized to
both enter and approve Requisitions. Only one option can be checked.

Individual Requesters – If the above option is checked indicating that this user will be authorized to create
requisitions, circle “Entry” on the top line and indicate the other requesters (by PeopleSoft User ID) for which they
will be authorized to create them. You must also indicate if they are allowed to Add, Update and/or Cancel
requisitions for each of these requesters.

If the above option is not checked, but the Requisition Approval option below is checked, circle “Approval” on the
top line and indicate the other requesters for which this user is authorized to approve requisitions. You must also
indicate if they are allowed to Update and/or Cancel requisitions for each of these requesters. Add is not an option
for Approvers.

Campus Requisition Approval User – The user granted this role will approve Requisitions for one or more
Requesters, but will not be able to approve a Requisition on which he/she is the Requester. The user will also have
the ability to update existing Requisitions, but cannot add new requisitions. Note that Users will not be authorized
to both enter and approve Requisitions. Only one option can be checked.

The user granted this role will also have the ability to inquire on Vendors, Requisitions, Purchase Orders, Receipts
and Vouchers in order to follow a Requisition as it progresses through the procurement cycle.

Campus Receiver of Goods and Services – The user granted this role will add and update receipts for shipments
of goods and performance of services. The user will also be able to delete receipts subject to PeopleSoft
parameters for this function. The user will also be able to add and update receipt activity lines, which are a
tracking mechanism for notes or actions related to a receipt.

Some users will also have the ability to modify the ChartFields to be used for accounting lines related to a receipt
they have entered. This functionality will permit entry of various ChartField strings on receipts related to Blanket
Purchase Orders where the ChartField String varies. NOTE: This functionality does not permit the addition of
more ChartField Strings than the Purchase Order contains.

P-Card

P-Card Campus Users – This user monitors usage and reconciliation of P-Card transactions, reallocates charges
to the appropriate Chartfield string, and approves purchases online. User may be the cardholder or may serve as
proxy for a different cardholder to perform statement reconciliation.

Locations

Locations Campus User - This user will be able to view locations (Campus addresses) on the Location Page in
PeopleSoft.
Grants

Inquiry/Reporting – This user will be able to inquire and report on proposals (based on Department Level Security for Grants) and awards.

Grant User – Proposal Creation, Approvals, Reporting – This user will be able to create, modify approve, inquire and report on proposals (based on Department Level Security for Grants).

Department Row-level security for Grants – This operates exactly like row-level security above, but is specific to creating, reviewing and approving Proposals within the Grants Module. A separate list of departments is needed here for security purposes. For example, a user from the Biology department may be collaborating on a Proposal with the Chemistry Department. The Biology user should be allowed to open, review and approve the Grant associated with the Chemistry Department, but should not be allowed to charge Chemistry on a Journal Entry or Requisition.

The same Department tree should be used here. Adding multiple detail values and multiple nodes works the same as above.

PI (Principal Investigator) – Indicates that this user is an eligible Principal Investigator

Project Module

Project Administrator – Take no action; reserved for future use.

Project Shop Supervisor – Take no action; reserved for future use.

Activity Team Member – Take no action; reserved for future use.

TRAINING

Has this person completed required training? Training can be either in one of UMBC’s regularly scheduled classes or by a peer mentor. UMBC is not requiring every user to complete formal training before accessing the system. A user may have prior experience or receive instruction from peer mentors or co-workers. However, the user must possess a competent level of skills to perform his/her job using PeopleSoft Software successfully.

WHAT HAPPENS NEXT?

The user and supervisor sign the certification statements and forward the request to the Assistant Vice President for Financial Services, 302 Administration Building. The Financial Support Team will review the form, process it and notify the user that access has been set up or changed. If you have any questions, please call Ext. 51642.