



Security Request Form

Supervisors, please select the appropriate access for employees by module/functional area. If there are areas outside the ones listed that are not displayed, make a note on the Employee information tab for the security administrator to see.

Employee Name		
Employee ID:		
Department:		
Job Title:		
Email Address:		
Type of Change: New/Change/Termination		Date signed
Employee Signature:		
Supervisor Name		Date signed
Supervisor Signature		
Security Admin Name		Date signed
Security Admin Signature		
Notes		

Query Access

Yes/No	Access Categories	Other specific needs; specify access here
	Can the user create Public Queries, or just Private Queries or just have the ability to run Public Queries?	
	Do they need to query sensitive data?	
	Is this a Budget Prep User?	

Local Security Admin

Yes/No	Access Categories	Other specific needs; specify access here
	Is this person a Security Administrator at your campus?	
	Does this person only need view access to security administration?	
	Will they be responsible for maintaining chartfield approvers for ePro and Payment Requests?	
	Will they be responsible for Requester and Buyer Setups for ePro and Purchasing?	
	Will they be responsible for setting up Commitment Control rules for budget override access?	
	Will this person be responsible for setting up Expenses Approvers?	

Budget Prep

Yes/No	Access Categories	Other specific needs; specify access here
	Do they need access to the setup pages in Budget Prep?	
	Do they need access to Update Budget Prep Data?	
	Do they need Inquiry access for Budget Prep Data?	
	Do they need Budget Prep reporting access?	
	Do they need to run the Budget Prep processes, like exports, imports, builds?	

Accounts Payable

Yes/No	Access Categories	Other specific needs; specify access here
	Do they need 1099 Access? access for all vouchers?	
	Do they need to have access to enter vouchers?	
	Do they need voucher processing access for all vouchers?	
	Do they need access to the Top Supplier Dashboards and if so what access level? (depts/projs)	
	Do they need access to run a paycycle?	
	Do they need access to approve a paycycle?	
	Do they need Accounts Payable reporting access?	
	Do they need Accounts Payable inquiry access?	
	Do they need access to process Direct deposit to Banner and Banner to AP?	
	Are they a workflow administrator for Voucher workflow?	
	Do they need the ability to Approve Vouchers and if so what level?	
	Do they need configuration access for Payables?	
	Can they override budget exceptions or budget date exceptions?	

Payment Request

Yes/No	Access Categories	Other specific needs; specify access here
	Do they need access enter a Payment Request?	
	Do they need access to approve a Payment Request and if so at what level?	
	Are they a Payment Request Workflow Admin?	

Asset Management

Yes/No	Access Categories	Other specific needs; specify access here
	Do they need access for asset depreciation?	
	Do they need access to load vouchers into AM?	
	Do they need access to Physical inventory?	
	Do they need access for Reporting or Inquiry pages in AM?	
	Do they need access to add/maintain assets?	
	Do they need access to Asset Management configuration pages?	
	Can they override budget exceptions or budget date exceptions?	

Accounts Receivable

Yes/No	Access Categories	Other specific needs; specify access here
	Do they need Inquiry or Reporting access for Accounts Receivable?	
	Do they need access to add customers?	
	Do they need access to create a receivable?	
	Do they need access to apply payments?	
	Do they need access to update customer banks?	
	Do they need access to process receivables and aging and process statements?	
	Can they override budget exceptions or budget date exceptions?	

Purchase Orders

Yes/No	Access Categories	Other specific needs; specify access here
	Do they need access to add/maintain Purchase Orders?	
	Do they need access to Approve Purchase Orders and if so what levels?	
	Do they need access to Receiving?	
	Are they a Supplier Workflow Admin Or Purchase Order Workflow admin?	
	Do they need Workcenter access?	

	Do they need access to create Share Suppliers/Update Institution Suppliers or need view only access to a supplier?	
	Do they need access to the PO Encumbrance Dashboard and if so what access/by dept/proj?	
	Do they need access to Purchasing Contracts and if so is it inquiry only, reports, or admin?	
	Do they need access to receive a PO in ePro?	
	Do they need access to approve a supplier?	
	Do they need setup access for Purchasing, configuration pages?	
	Do they need reporting or inquiry access for Purchasing?	
	Can they override budget exceptions or budget date exceptions?	

eProcurement

Yes/No	Access Categories	Other specific needs; specify access here
	Do they need access to create Requisitions; If so can they create requisitions all year or is their access cutoff at year end?	
	Do they need access to approve Requisitions; Specify type (depts, projects, NIGP codes, buyer level, etc.)?	
	Do they need access to be an ad hoc approver? Or a Workflow Administrator?	

	Do they need access to configure and setup pages in ePro?	
	Do they need inquiry and reporting access in ePro?	
	Do they need access to budget check, reconcile, close or reopen requisitions?	
	Do they need access to the marketplace? If so as a shopper, buyer, requester or browser?	
	Do they need access to the marketplace for building electronic invoices?	
	Can they override budget exceptions or budget date exceptions?	

Travel & Expenses

Yes/No	Access Categories	Other specific needs; specify access here
	Do they need access to enter a cash advance?	
	Do they need access to process cash advance reconciliations and close cash advances?	
	Do they need access to Expenses Profiles, maintaining chartfield and banking information, and setting up approver assignments pages?	
	Do they need Inquiry or Reporting Access in Expenses?	
	Do they need access to reassign expense transactions?	
	Do they need access to be an expenses approver and if so for what	

	depts or projects and what expenses level?	
	Can they override budget exceptions or budget date exceptions?	

General Ledger

Yes/No	Access Categories	Other specific needs; specify access here
	Do they need access to enter and maintain journals?	
	Do they need access to approve journals? Are they the workflow admin?	
	Do they need access to the Payroll account distribution?	
	Do they need access to the setup and configuration pages for General Ledger?	
	Do they need access to process period end? Closing rules, open/close periods, etc?	
	Do they need access to the department manager dashboards and if so what depts/projs?	
	Do they need access to process TIGA?	
	Do they need access to GL Processing such as budget checking, editing, benefits billing, payroll to GL, etc?	
	Do they need reporting and inquiry access in General Ledger?	
	Do they need access to year end reports?	

	Do they need access to bank recon and bank statements?	
	Do they need access to add a new bank or bank account?	
	Do they need nVision Access?	
	Do they need access to update the chart of accounts?	
	Do they need access to post a journal?	
	Do they need access to run journal generation?	
	Can they override budget exceptions or budget date exceptions?	

Commitment Control

Yes/No	Access Categories	Other specific needs; specify access here
	Do they need access to create budget journals and/or budget transfers (please specify)?	
	Do they need access to reset transactions?	
	Do they need access to override budget exceptions or budget date exceptions?	
	Do they need access to budget progress reports and or grant budget progress reports?	
	Do they need inquiry and reporting access in Commitment Control?	

	Do they need access to post a budget journal?	
	Do they need access to maintaining budget attributes, assigning commitment control budget rules, etc?	
	Do they need access to be a budget journal approver? Or workflow administrator?	
	Do they need access to Encumbrance Projection to GL?	

Other

Yes/No	Access Categories	Other specific needs; specify access here
	Do they need access to Historical Common Remitter Menus?	