Controller's Office
email: controller@umn.edu
For help determining which access to request: 612-624-1617

PeopleSoft Financials / EFS
access request
August 9, 2017

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	Requisition & UStores preparers	Procurement specialists
Default Ship To Location (usually begins with P):	*Internet ID(s) of those for whom you need to act as a backup requisition preparer/receiver:*	*Internet ID(s) of your backup procurement specialist:*
Default Asset Location code (REQUIRED):		*Internet IDs of requisition preparers for whom you will be sourcing POs:*
Phone number to be printed on POs: / *Fax number to be printed on POs:*		
Internet ID of your procurement specialist:		*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 +)
Speedchart Correction
Vendor Correction
Vendor Specialist
Vendor Specialist (with UMNIS)
Voucher Specialist (Central)
Voucher Specialist (Student Finance & Acctg Svcs ONLY, Bus.Unit UMNSF)
Voucher Excel Upload
    UMN01
    UMNIS
    UMNSPV

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

This form is for use by financial BPO units only. Contact the University Financial Helpline 612-624-1617 or controller@umn.edu with questions.

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: