



FFRA Systems Central Security Access Form

Instructions

Applicant or Proxy

1. The fields and check boxes on this form may be filled with Adobe Reader: <http://get.adobe.com/reader>
2. Complete section A (**required fields are marked with ***) and indicate Request Type
3. Indicate an existing user to mirror OR select (or click) individual options in sections B–M (pgs. 2 - 10)
**Please note that this option will copy the other user's access exactly for items in each section. Any existing access will be replaced with this new security.*
4. Print a hard copy with applicant name, have applicant sign and date the Required Approvals section (pg. 12)
5. Route completed form to applicant's department head for signatures.

Security Approvers

1. Review requested access
2. Print your name, sign and date the appropriate area in the Required Approvals section (pg. 12)
3. Enter an 'X' in the Request Approved or Request Denied box
4. Route the form to the approver for the next area where access has been requested. If no additional approval is required, route the form to:

FOIT Security
Financial Operations IT
619 Clark #118
Evanston Campus
 FAX: 847-467-3070

You can also scan and email to: foitsecurity@northwestern.edu

SECTION A

*Date	
*NetID	
*Name (Last, First MI)	
*HRIS EMPLID	
Title	
NU Email	
Department	
Work Phone	

REQUEST TYPE (Check all that apply)

To **add** a user, select the appropriate box(es) below, then complete section(s) B–M.
 To **inactivate** a user, select the appropriate box(es) below, sign, and forward form to foitsecurity@northwestern.edu.
 To **modify** access, select box(es) below, then select add/delete as appropriate in section(s) B–M.

- | | | | |
|--|-------------------------------------|--|--|
| NUFinancials (Section B, F2–H, J–M) | <input type="checkbox"/> ADD | <input type="checkbox"/> INACTIVATE | <input type="checkbox"/> MODIFY |
| Workflow (Section C) | <input type="checkbox"/> ADD | <input type="checkbox"/> INACTIVATE | <input type="checkbox"/> MODIFY |
| Row Level Security (Section D) | <input type="checkbox"/> ADD | <input type="checkbox"/> INACTIVATE | <input type="checkbox"/> MODIFY |
| Facilities Management (Section E) | <input type="checkbox"/> ADD | <input type="checkbox"/> INACTIVATE | <input type="checkbox"/> MODIFY |
| Grants Management (Section F) | <input type="checkbox"/> ADD | <input type="checkbox"/> INACTIVATE | <input type="checkbox"/> MODIFY |
| SciQuest (Section H2) | <input type="checkbox"/> ADD | <input type="checkbox"/> INACTIVATE | <input type="checkbox"/> MODIFY |

Is this a School or Department transfer? **Yes** **No**



FFRA Systems Central Security Access Form

SECTION B: GENERAL ACCESS

MODEL GENERAL ACCESS AFTER EXISTING USER (optional)

Print Name:

NetID:

If NOT mirroring another user, enter an 'X' in the box to the left of each appropriate access option in sections B–M.

A D D	D E L	COGNOS REPORTING Generate and view reports in school folders indicated below	
<input type="checkbox"/>	<input type="checkbox"/>	Monthly Financial	Budget statements, revenue and expense activity and financial reports SCH_MONTH_FINC
<input type="checkbox"/>	<input type="checkbox"/>	Budget/COA	Capital project, budget detail, chart field mapping and job cost reports SCH_BUDGET
<input type="checkbox"/>	<input type="checkbox"/>	Sponsored Programs Management	Financial and management reports for sponsored projects SCH_SPO_PRGS_MNGT
<input type="checkbox"/>	<input type="checkbox"/>	Supply Chain	Vendor and Procurement Tracking Reports (Encumbrances, Delivery, Change Order History) SCH_SUPPLY_CHAIN
<input type="checkbox"/>	<input type="checkbox"/>	SES Tuition Encumbrance	SES tuition encumbrance details. FFRA_SES_ENCUMBRANCE
<input type="checkbox"/>	<input type="checkbox"/>	Ad Hoc Query Runner	Ability to run reports created by Ad Hoc Query Authors CAFE_NU_COGNOS_AD_HOC_VIEWERS
<input type="checkbox"/>	<input type="checkbox"/>	Ad Hoc Query Author (Training Required)	Access to Query Studio to create, build, and save reports CAFE_NU_COGNOS_AD_HOC_AUTHORS <i>NOTE: Ad Hoc Query Author automatically includes Ad Hoc Query Runner</i>

A D D	D E L	TRAVEL AND EXPENSE ACCESS	
<input type="checkbox"/>	<input type="checkbox"/>	Expense Entry	Enter expense reports, advances, and travel authorizations for yourself or for other individuals for whom you have proxy access. Does not enable a user to modify their expense report proxy list. PG-EX-Employee
<input type="checkbox"/>	<input type="checkbox"/>	Expense Inquiry	View expense reports, advances, and travel authorizations. PG-EX-Inquiry
<input type="checkbox"/>	<input type="checkbox"/>	Expense Proxy	Maintain a list of users for whom a user with the Expense Entry role can enter data on behalf of. Can modify any user's proxy list. PG-EX-Proxy

A D D	D E L	PROCUREMENT ACCESS	
<input type="checkbox"/>	<input type="checkbox"/>	Shopper <i>Choose EITHER Shopper or Requester</i>	Access iBuyNU but cannot create requisitions in NUFinancials. Used to define iBuyNU users. Requires valid HRIS Employee ID (emplid). PG-PV-Shopper
<input type="checkbox"/>	<input type="checkbox"/>	Requester <i>Choose EITHER Shopper or Requester</i>	Create and view requisitions for any chart string. 'Punch out' to iBuyNU via NUFinancials. Create Requisitions menu to create new orders and pick up carts assigned to you by Shoppers. Modify and receive your own orders. View and print purchase orders. PG-PV-Requester <i>NOTE: Requester role automatically includes Receiver role.</i> Please indicate default ship to code: _____ Find Ship To Codes (.pdf)
<input type="checkbox"/>	<input type="checkbox"/>	Online Voucher	Create and edit online vouchers (Direct Payment Requests, Visitor Expense Reports and Contracted Services Forms). Note: If the user already has either the PG-AP-Entry or PG-Accnt-Srvcs role, do not add this role to the profile. These roles are not compatible. PG-AP-Online Voucher
<input type="checkbox"/>	<input type="checkbox"/>	Receiver	Loading dock personnel and central staff. Receive for all orders, including those placed by other users. PG-PV-Receiver
<input type="checkbox"/>	<input type="checkbox"/>	eProcurement Inquiry	Inquire on the status of orders in NUFinancials via eProcurement module pages. PG-PV-Inquiry ePro
<input type="checkbox"/>	<input type="checkbox"/>	Procurement Inquiry	Inquire on the status of orders in NUFinancials via Purchasing module pages. PG-PV-Inquiry Pro
<input type="checkbox"/>	<input type="checkbox"/>	Accounts Payable Inquiry	View voucher data, basic vendor data (not FEIN/SSN), and payment history. PG-AP-Inquiry

A D D	D E L	GENERAL LEDGER ACCESS	
<input type="checkbox"/>	<input type="checkbox"/>	Budget Journal Entry	Create revenue and expense budget adjustment entries via the budget journal portal (journals cannot cross fund groups). PG-GL-Budget Journal Entry
<input type="checkbox"/>	<input type="checkbox"/>	Journal Entry	Create revenue and expense GL adjustment entries via the actuals journal portal. Also permits access to GL inquiry pages. PG-GL-Journal Entry
<input type="checkbox"/>	<input type="checkbox"/>	Balance Sheet Journal Entry	Create balance sheet GL transactions via the actuals journal portal. PG-NU-Portal Journals
<input type="checkbox"/>	<input type="checkbox"/>	Cash Receipt Entry	Enter and inquire on cash receipt transaction entries. PG-GL-Department CRT Entry
<input type="checkbox"/>	<input type="checkbox"/>	Cash Receipt Inquiry	View-only access to cash receipt transaction entry pages. PG-GL-Department CRT Inquiry
<input type="checkbox"/>	<input type="checkbox"/>	Budget Inquiry	Budget status inquiry. Complete Row Level Security (pg. 4). PG-GL-KK Inquiry
<input type="checkbox"/>	<input type="checkbox"/>	Journal Import	Upload Actuals journals via a spreadsheet or flat file import. PG-GL-Journal Import
<input type="checkbox"/>	<input type="checkbox"/>	ChartField Manager Entry	Access to enter and update managers, reviewers and attributes for ChartField values. PG-GL-CF Managers Entry
<input type="checkbox"/>	<input type="checkbox"/>	ChartField Values View Only	View ChartField values including Project ID, Department ID, Account, CF1, Fund, and related attributes. PG-GL-Chartfield View Only

A D D	D E L	FAMIS WEB BASED ROLES	
<input type="checkbox"/>	<input type="checkbox"/>	Self Service	Create and inquire on Facilities Management self-service requests.

Housing Users: Will requests from this user require review? Yes No



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SECTION C: WORKFLOW

MODEL WORKFLOW ACCESS AFTER EXISTING USER (optional)

Print Name:

NetID:

Workflow approval provides the ability to approve expense reports, requisitions, online vouchers and journals for the specified department or project. Budget Approval provides the ability to approve budget journals of any amount for the specified department.

You may specify a tree node to grant approval for multiple departments. The Department Tree Mapping reference document defines the available tree nodes and underlying departments.

Specifying a Dept Approval Level or Project Approval grants Expense Approval, Requisition & PO Approval, Online Voucher and Journal Approval roles.

Specifying Dept Budget Approval grants the Budget Journal Approval role.

Specifying Direct Journal Approver grants the PG-GL-Direct Journal Approver role for any amount on assigned sources.

Specify Departments and/or Department Tree Nodes

Dept Approval, Level 1 (\$0-\$1,499) Add Remove

Dept Approval, Level 2 (\$1,500-\$4,999) Add Remove

Dept Approval, Level 3 (\$5,000 and up) Add Remove

Dept Budget Approval Add Remove

Projects

Project Pre-Approval Add Remove

Add Remove

Add Remove

Source Tree Node

Direct Journal Approver Add Remove

SECTION D: ROW LEVEL SECURITY (RLS)

MODEL RLS ACCESS AFTER EXISTING USER (optional)

Print Name:

NetID:

Row Level Security indicates the data that you will be able to view online and in reports. General ledger, Budget ledger, and Grants information are limited by your row level security access.

You may specify a tree node to grant access for multiple departments. The Department Tree Mapping reference document defines the available tree nodes and underlying departments.

Only indicate project access for projects that are not owned by the departments that you have listed below. Department access automatically grants access to all projects owned by those departments. The Dean's Office that owns any projects specified will be contacted for approval prior to granting access.

Specify Departments or Department Tree Nodes Add Remove

Add Remove

Add Remove

Specify Projects Add Remove

Add Remove

Add Remove

SALARY ACCESS

Provides the ability to view payroll detail by employee for all departments and projects where row level security has been indicated. Add Remove



FFRA Systems Central Security Access Form

SECTION E: FACILITIES MANAGEMENT ACCESS

A D D	D E L	FAMIS ROLES
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<input type="checkbox"/>	<input type="checkbox"/>	Administrative support	Administrative support: Clerical support employees in Facilities Management who have responsibility for labor and material entries and work order closing. NU_ADMIN_SUPPORT
<input type="checkbox"/>	<input type="checkbox"/>	Budget administrator	Central administrative users outside of Facilities. View-only access to Maintenance Management forms, including Equipment, Projects and Work Orders. FAMIS delivered reports for each of those areas. NU_BUDGET
<input type="checkbox"/>	<input type="checkbox"/>	Customer service	Provides access for customer service employees in Facilities Management to create and assign work orders and projects, maintain billing information, and perform research needed to respond to any queries about work performed or managed by Facilities Management. NU_CUSTOMER_SERV
<input type="checkbox"/>	<input type="checkbox"/>	Department approval	Administrative employees outside of Facilities. Write access to Services Requests and the Service Request workbench. Can approve service requests where applicable. NU_DEP_APPROVER
<input type="checkbox"/>	<input type="checkbox"/>	Equipment administrator	Facilities Management employees. Specific access to all Equipment and Preventive Maintenance procedures and schedules. NU_EQUIPMENT
<input type="checkbox"/>	<input type="checkbox"/>	Field Technician	Access to Maintenance Management areas of FAMIS with particular emphasis on service request and work management. NU_FIELD_TECH and NU_FIELD_TECH2
<input type="checkbox"/>	<input type="checkbox"/>	Financial administrator	Access to most Maintenance Management and Inventory Control forms, including access to job costing functionality and all other functions required to support, research and correct billing and recharge activities. NU_FINANCIAL
<input type="checkbox"/>	<input type="checkbox"/>	Inventory administrator	Access to purchasing and inventory control. NU_INVENTORY
<input type="checkbox"/>	<input type="checkbox"/>	Manager	Facilities Management managers. Access to most FAMIS delivered reports in Maintenance Management and Inventory Control. Write access to the Service Request and Service Request workbench forms in order to facilitate estimate routing. NU_MANAGER
<input type="checkbox"/>	<input type="checkbox"/>	Project manager	Access to Maintenance Management areas of FAMIS with particular emphasis on project management and estimate routing. NU_PROJECT_MAN
<input type="checkbox"/>	<input type="checkbox"/>	School/Dept User	Central and School/Departmental users outside of Facilities. View-only access to Projects, Service Requests and Work Order forms and all FAMIS delivered reports specifically pertaining to buildings. NU_SCHOOL_DEPT
<input type="checkbox"/>	<input type="checkbox"/>	Scheduler	Facilities Management employees who are primarily responsible for scheduling routine maintenance, preventative maintenance and project-related work. NU_SCHEDULER
<input type="checkbox"/>	<input type="checkbox"/>	Supervisor	Access to all Maintenance Management areas, including labor approvals, scheduling and project management-related activities. NU_SUPERVISOR
<input type="checkbox"/>	<input type="checkbox"/>	System Administrator	Facilities Management IT employees only. Access to all Maintenance Management and Inventory Control forms and reports, excluding Security-related applications. NU_SYS_ADMIN

A D D	D E L	COGNOS Reporting, Generate and View reports in central folders indicated below
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<input type="checkbox"/>	<input type="checkbox"/>	Facilities	Access to delivered reports in this folder. (CEN_FACILITIES)
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Ad Hoc Reporting Access

<input type="checkbox"/>	<input type="checkbox"/>	COGNOS	Cognos Ad Hoc Reporting.
<input type="checkbox"/>	<input type="checkbox"/>	QY-NU-Query Viewer	Run public NUFInancials queries.
<input type="checkbox"/>	<input type="checkbox"/>	QY-NU-Query Create	Create NUFInancials queries.



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SECTION F: GRANTS DEPARTMENT ROLES

MODEL GRANTS DEPARTMENT ROLES AFTER EXISTING USER (optional)

Print Name:

NetID:

Office for Sponsored Research (OSR) data contains confidential information. The technical, programmatic, and budgetary details of an individual proposal are confidential and the contents of a proposal may not be disclosed without the prior written approval of the proposal's PI. Any authorized university user may otherwise access proposal data elements such as the proposal title, amount requested, and period of performance without obtaining the PI's approval. Aggregate proposal data may be reported in accordance with the restrictions set forth in the remainder of this Agreement. Researcher social security numbers and employee IDs are confidential and may only be disclosed to units who are administering the proposal or award.

By signing this request you agree to the following provisions. You will not provide others with unlimited access to OSR data without prior approval of OSR. You will not seek personal benefit or permit others to benefit personally from information contained in any OSR dataset. You will not divulge the contents of any record or report to any person except in the conduct of your work assignment and in accordance with University and departmental policies. You acknowledge OSR as the data collection source when making any permitted disclosures of OSR data. You understand that OSR provides all data without warranty. You are obligated to inform OSR of any problems detected in the OSR data as soon as possible. You will not include or cause to be included in any record or report a false, inaccurate, or misleading entry. You will not divulge IDs or passwords to anyone.

InfoEd General Access

OSR Staff	<input type="checkbox"/> Add <input type="checkbox"/> Remove	InfoEd Genius/Profile Administrator (No access to setups)	<input type="checkbox"/> Add <input type="checkbox"/> Remove
OSR Award Logger	<input type="checkbox"/> Add <input type="checkbox"/> Remove	ASRSP User	<input type="checkbox"/> Add <input type="checkbox"/> Remove
OSR Info Team	<input type="checkbox"/> Add <input type="checkbox"/> Remove	Helpdesk/FFRA Support	<input type="checkbox"/> Add <input type="checkbox"/> Remove

InfoEd Administrative Access

OSR Sponsor Administrator	<input type="checkbox"/> Add <input type="checkbox"/> Remove	InfoEd Genius/Profile Administrator (Access to setups)	<input type="checkbox"/> Add <input type="checkbox"/> Remove
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InfoEd Report Access

COGNOS: Report User	<input type="checkbox"/> Add <input type="checkbox"/> Remove	COGNOS: Query Studio	<input type="checkbox"/> Add <input type="checkbox"/> Remove
BI Publisher: Sub-K Database	<input type="checkbox"/> Add <input type="checkbox"/> Remove		

You may specify a tree node to grant access for multiple departments.

Specify Departments or Department Tree Nodes	<input type="checkbox"/> Add <input type="checkbox"/> Remove
	<input type="checkbox"/> Add <input type="checkbox"/> Remove
	<input type="checkbox"/> Add <input type="checkbox"/> Remove



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SECTION G: OFFICE OF RESEARCH SAFETY CENTRAL OFFICE ROLES

Model ORS Access after Existing User

Print Name:

NetID:

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| <input type="checkbox"/> | <input type="checkbox"/> | Research Safety Approval | Approve restricted research material purchases. |
| <input type="checkbox"/> | <input type="checkbox"/> | QY-NU-Query Scheduler | Schedule NUFinancials queries. |

SECTION H: PROCUREMENT CENTRAL OFFICE ACCESS

Model Procurement Access after Existing User

Print Name:

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| <input type="checkbox"/> | <input type="checkbox"/> | PRS Approver | Approve blanket order requisitions and requisitions \$25,000 and over. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-PV-Central | Add purchase orders on-line, Generate and dispatch purchase orders via batch. Process change orders. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-PV-Inquiry Pro | Purchasing orders status inquiry. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-PV-Sciquest Admin | Enable SciQuest suppliers in NUFinancials. Does not include access to create NUFinancials vendors or enable SciQuest vendors or catalogs. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-PV-PRS Admin | Add/update ship to, location, and category configuration. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-PV-POC Analyst | Review and process PO Change Order requests submitted by requesters. |

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COGNOS Reporting, Generate and View reports in central folders indicated below

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| <input type="checkbox"/> | <input type="checkbox"/> | Supply Chain | Access to delivered reports in this folder. (CEN_SUPPLY_CHAIN) |
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Query Access

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| <input type="checkbox"/> | <input type="checkbox"/> | QY-NU-Query Viewer | Run public NUFinancials queries. |
| <input type="checkbox"/> | <input type="checkbox"/> | QY-NU-Query Create | Create NUFinancials queries. |
| <input type="checkbox"/> | <input type="checkbox"/> | QY-NU-Query Scheduler | Schedule NUFinancials queries. |

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SECTION H2: SCI-QUEST ADMINISTRATION ACCESS

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| <input type="checkbox"/> | <input type="checkbox"/> | System Administrator | PRS eProcurement Administrator. Shop catalog and punchout, create favorites for self and organization, product compare, view and edit all orders and invoices, restart PO and invoice exports, field and list management, system configuration, change own password, catalog management, catalog reports, transaction reports, usage reports. |
| <input type="checkbox"/> | <input type="checkbox"/> | Catalog Administrator | PRS Procurement Administrator. Shop catalog and punchout, create favorites for self and organization, product compare, view all orders, catalog management, catalog reports, change own password. |
| <input type="checkbox"/> | <input type="checkbox"/> | PRS Analyst | PRS Procurement Analyst. Shop catalog and punchout, create favorites for self and organization, product compare, view all orders and invoices, catalog management, catalog reports, transaction reports, usage reports, change own password. |
| <input type="checkbox"/> | <input type="checkbox"/> | Accounts Payable | Accounts Payable Staff. View all invoices, change own password |
| <input type="checkbox"/> | <input type="checkbox"/> | QY-NU-Query Scheduler | Schedule NUFinancials queries. |



FFRA Systems Central Security Access Form

SECTION I: BUDGET OFFICE CENTRAL OFFICE ROLES

Model Budget Office Access after Existing User

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| <input type="checkbox"/> | <input type="checkbox"/> | Budget Office Approver | Authorization to provide Budget Office approval. Budget transactions equal to or exceeding \$50,000 require Budget Office approval. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-GL-Budget Office Analyst | Commitment Control inquiry. Budget journal entry, approval and posting. General Ledger inquiry. NUFinancials General Ledger reports. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-GL-Budget Office Approver | PG-GL-Budget Office Analyst access with the following additional access: Commitment Control override, General Ledger journal entry. Journal approval via workflow routing. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-GL-Budget Journal Deletion | Delete budget journals. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-GL-Budget Office Super-user | PG-GL-Budget Office Approver access with the following additional access: Year end budget close and Commitment Control configuration inquiry. |

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COGNOS Reporting, Generate and View reports in central folders indicated below

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| <input type="checkbox"/> | <input type="checkbox"/> | Budget | Access to delivered reports in this folder. (CEN_BUDG) |
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Query Access

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| <input type="checkbox"/> | <input type="checkbox"/> | QY-NU-Query Viewer | Run public NUFinancials queries. |
| <input type="checkbox"/> | <input type="checkbox"/> | QY-NU-Query Create | Create NUFinancials queries. |
| <input type="checkbox"/> | <input type="checkbox"/> | QY-NU-Query Scheduler | Schedule NUFinancials queries. |

SECTION J: ASRSP CENTRAL OFFICE ROLES

Model ASRSP Access after Existing User

Print Name:

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| <input type="checkbox"/> | <input type="checkbox"/> | ASRSP Approver | Approve Grants related expenses \$2,500 and over. Grants travel, consulting and subcontractor expenses. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-GM-ASRSP Acctng Rep_subk | Update award profiles |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-GM-ASRSP_BI Specialist | Update access to contracts. Generate invoices and establish milestones/events for prepaid, scheduled and fixed price awards. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-GM-ASRSP_BI Adjuster | Credit and rebill invoices. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-GM-ASRSP_BI - LOC | Process LOC draw amounts. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-GM-ASRSP_Contract Activate | Activate contracts. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-GM-ASRSP_AR Depositor | Enter deposits. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-GM-ASRSP_AR Payment | Apply payments. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-GM-ASRSP_AR Specialist | Approve deposits, update access to AR maintenance, collection, and conversation pages. Run aging and create dunning letters. Correct AR posting errors. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-GM-ASRSP_InfoTeam | Process revenue. Correct BI interface, run F&A, review F&A errors. Update configuration data related to sub-recipients and institution audit status. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-GM-Grants_FA_NU Rates | Update Institution F&A Rates. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-GM-Grants_FA_Offsets | Update F&A Offsets configuration. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-GM-Acctng_Srvcs_Invoicer | Enter and maintain AR information for non-grants receivables. Create AR entries, add/update customer data. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-GM-Acctng_Srvcs_Reconciler | Update banking information, AR maintenance, collection, and conversation pages. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-GM-Post_Reporter | Run post award reports (SF272, SF269, F&A error report, and award budget inquiry). |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-GM-Cash_AR_Reporter | Run aging reports and general AR reports by customer. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-GM-Sponsor Profile Maint | Update sponsor profile. Review InfoEd to NUFinancials sponsor interface errors. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-GM-Grants Project Team | Add or delete Team Members (PI, Co-PI, RADM, etc.) to the Project Team. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-GM-Project Cost View Only | Project Costing View Only. View Project ID information in Project Costing, including detailed descriptions. |



FFRA Systems Central Security Access Form

A D D	D E L	COGNOS Reporting, Generate and View reports in central folders indicated below
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| <input type="checkbox"/> | <input type="checkbox"/> | Sponsored Programs Mgt | Access to delivered reports in this folder. (CEN_SPO_PRGS_MNGT) |
| <input type="checkbox"/> | <input type="checkbox"/> | Sponsored Programs Mgt - Restricted | Access to delivered reports in this folder. (CEN_SPO_PRGS_MNGT_RESTRICTED) |

A D D	D E L	Query Access
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| <input type="checkbox"/> | <input type="checkbox"/> | QY-NU-Query Viewer | Run public NUFInancials queries. |
| <input type="checkbox"/> | <input type="checkbox"/> | QY-NU-Query Create | Create NUFInancials queries. |
| <input type="checkbox"/> | <input type="checkbox"/> | QY-NU-Query Scheduler | Schedule NUFInancials queries. |

SECTION K: PAYABLES/TRAVEL & EXPENSE CENTRAL OFFICE ACCESS

Model Payables/Travel & Expense Access after Existing User

Print Name:

NetID:

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| <input type="checkbox"/> | <input type="checkbox"/> | PG-EX-Auditor | Receives all expense transactions via workflow for approval. Permits a user to review and update expense reports, advances and travel authorizations entered by others. Can access delivered NUFInancials reports related to Expenses module. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-EX-Manager | Update select employee data, including bank account data and user defaults. Update select configuration settings. Run expense processing process. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-AP-Manager | AP Manager. Voucher entry, express check entry, match exception override, pay cycle, voucher post, budget check, matching. View access to vendor data. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-AP-Supervisor | AP Supervisor. Process express checks, control groups, voucher build, voucher post, budget check, matching, payment post, paycycle. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-AP-Entry | Voucher entry, match workbench, receipt entry.
Note: If user has the PG-AP-Online Voucher role, do not add this role to their profile. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-AP-Inquiry | View voucher data, basic vendor data, payment history. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-AP-Accnt-Srvcs | Voucher entry.
Note: If user has the PG-AP-Online Voucher role, do not add this role to their profile. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-AP-Accnt-Srvcs-Apprv | Voucher approval. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-AP-VndrMaint | Add/update vendors. Full access to vendor data. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-AP-1099 | 1099 processing. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-AP-Match-Exception | PRS/Interface Review. View only access to AP match errors. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-AP-Interface-Review | SES/Voyager interface owners, voucher view. |
| <input type="checkbox"/> | <input type="checkbox"/> | PG-AP-Rcpt-Accrual | Review and run receipt accrual, PO budget year end processing. |

A D D	D E L	COGNOS Reporting, Generate and View reports in central folders indicated below
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- | | | | |
|--------------------------|--------------------------|--------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Vendor Maintenance | Access to delivered reports in this folder. (CEN_VENDOR_RESTRICTED) |
| <input type="checkbox"/> | <input type="checkbox"/> | Voyager | Access to delivered reports in this folder. (CEN_VOYAGER) |

A D D	D E L	Query Access
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- | | | | |
|--------------------------|--------------------------|-----------------------|----------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | QY-NU-Query Viewer | Run public NUFInancials queries. |
| <input type="checkbox"/> | <input type="checkbox"/> | QY-NU-Query Scheduler | Schedule NUFInancials queries. |



FFRA Systems Central Security Access Form

SECTION L: GENERAL LEDGER CENTRAL OFFICE ROLES

Model General Ledger Access after Existing User

Print Name:

NetID:

A D D	D E L		
<input type="checkbox"/>	<input type="checkbox"/>	PG-GL-Acct Srv NUJrnl Approver	Approve journals created via the actuals journal portal.
<input type="checkbox"/>	<input type="checkbox"/>	PG-GL-Acctng Srvcs Jrnl Entry	Enter Actuals journals via portal and NUFinancials pages. Commitment control and General Ledger inquiry. Save, edit, budget check journals.
<input type="checkbox"/>	<input type="checkbox"/>	PG-GL-Acctng Srvcs Jrnl Review	Mark journals for posting via portal workflow/review function (cannot mark Accounting Services journals to post). Enter journals, approve journals. General Ledger reports.
<input type="checkbox"/>	<input type="checkbox"/>	PG-GL-Mark Jrnls to Post	Mark Journals to post.
<input type="checkbox"/>	<input type="checkbox"/>	PG-GL-Acctng Srvcs Jrnl Post	Post journals.
<input type="checkbox"/>	<input type="checkbox"/>	PG-GL-Acctng Srvcs Reports	General Ledger reports, Commitment Control and General Ledger inquiry. Ability to execute Nvision reports.
<input type="checkbox"/>	<input type="checkbox"/>	PG-GL Acctng Srvcs Config	Allocations, bank account, year end close, ledger, journal, setup pages.
<input type="checkbox"/>	<input type="checkbox"/>	PG-GL Acctng Srvcs Super-User	Aggregate role of all PG-GL roles. Permits access to all functions held by these roles. Limited to key managers in Accounting Services to expedite transaction processing when necessary.
<input type="checkbox"/>	<input type="checkbox"/>	PG-GL-Acctng Srvcs Jrnl Delete	Accounting Services Manager, receive notifications for journal delete requests.
<input type="checkbox"/>	<input type="checkbox"/>	PG-GL-Acctng Srvcs CF Maint	Has ability to add and update chart field values.
<input type="checkbox"/>	<input type="checkbox"/>	PG-GL-Acctng Srvcs Tree Maint	Add, update trees.
<input type="checkbox"/>	<input type="checkbox"/>	PG-GL-KK Inquiry with Attribut	PG-GL-KK Inquiry access with the following additional access: Budget attributes inquiry.
<input type="checkbox"/>	<input type="checkbox"/>	PG-GL-Bursars Office CRT Access	Enter, review, and post CRT entries.
<input type="checkbox"/>	<input type="checkbox"/>	PG-GL-OSR Control Buds	Edit budget attributes. This role is not currently active but has been created for future use.
<input type="checkbox"/>	<input type="checkbox"/>	PG-PV-Pcard Admin	Allows access to the Purchasing module and several GL journal functions in order to run the P-Card interface and process the related journal.
<input type="checkbox"/>	<input type="checkbox"/>	GL Reports	Access for only online NUFinancials GL Reports. PG-GL-Ledger Reports
<input type="checkbox"/>	<input type="checkbox"/>	PG-GL-Acctng Srvcs Jrnl Susp	Correct suspended Journals.
<input type="checkbox"/>	<input type="checkbox"/>	PG-NU-AM Transaction Process	Create and process Asset physical and financial information.

A D D	D E L	COGNOS Reporting, Generate and View reports in central folders indicated below	
<input type="checkbox"/>	<input type="checkbox"/>	Accounting Services	Access to delivered reports in this folder. (CEN_ACC_SERV)

A D D	D E L	Query Access	
<input type="checkbox"/>	<input type="checkbox"/>	QY-NU-Query Viewer	Run public NUFinancials queries.
<input type="checkbox"/>	<input type="checkbox"/>	QY-NU-Query Create	Create NUFinancials queries.
<input type="checkbox"/>	<input type="checkbox"/>	QY-NU-Query Scheduler	Schedule NUFinancials queries.

SECTION M: BANK RECONCILIATION CENTRAL OFFICE ROLES

Model Bank Reconciliation Access after Existing User

Print Name:

NetID:

A D D	D E L		
<input type="checkbox"/>	<input type="checkbox"/>	PG-GL-Bank Reconciliation Mgr	Bank reconciliation setup and processing.
<input type="checkbox"/>	<input type="checkbox"/>	PG-GL-Bank Reconciliation Review	Bank reconciliation inquiry pages.
<input type="checkbox"/>	<input type="checkbox"/>	PG-GL-NT_Investment_User	Import and roll back Northern Trust Investment transactions. Import/reload primary NTFUND to PS chart string mapping table.

A D D	D E L	Query Access	
<input type="checkbox"/>	<input type="checkbox"/>	QY-NU-Query Viewer	Run public NUFinancials queries.
<input type="checkbox"/>	<input type="checkbox"/>	QY-NU-Query Create	Create NUFinancials queries.
<input type="checkbox"/>	<input type="checkbox"/>	QY-NU-Query Scheduler	Schedule NUFinancials queries.



FFRA Systems Central Security Access Form

REQUIRED APPROVALS

Financial system users at all levels of the organization are charged with responsibility for ensuring that prescribed guidelines and policies are followed when conducting business at the University. The policies outlined in Standards for Business Conduct include confidentiality of University financial data, proper accounting and use of University assets, in addition to policies on purchasing, travel and entertainment, and other business activities. See: <http://policies.northwestern.edu/standards>

By submitting this request, the user and department head affirm that they are aware of and will comply with University business guidelines and policies referenced in the Standards for Business Conduct and all other applicable policies. The user also affirms compliance with all NUIT policies. Access may be changed or revoked at any time. NUIT policies are available for review at <http://www.it.northwestern.edu/policies>.

Dean's office signature authorizes all access including cross department security.

APPLICANT		
Print Name:	Signature:	Date:

B-D General Access, Workflow, RLS		<input type="checkbox"/> Access Requested
Applicant's Department Head <input type="checkbox"/> Request Approved <input type="checkbox"/> Request Denied	Print Name:	
	NetID:	
	Email:	
	Signature:	Date:

E: Facilities Management Central Office		<input type="checkbox"/> Access Requested
Facilities Mgt Security Admin <input type="checkbox"/> Request Approved <input type="checkbox"/> Request Denied	Route to Security Administrator, Facilities Mgt, 2020 Ridge, EV Campus	
	Print Name:	
	NetID:	
	Email:	
	Signature:	Date:

F: Grants Department Roles		<input type="checkbox"/> Access Requested
Dean's Office, Security Administrator <input type="checkbox"/> Request Approved <input type="checkbox"/> Request Denied	Enter Route to: _____	
	Print Name:	
	NetID:	
	Email:	
	Signature:	Date:
OSR Security Administrator <input type="checkbox"/> Request Approved <input type="checkbox"/> Request Denied	Route to Security Administrator, OSR, 1801 Maple, Suite 2410, EV Campus	
	Print Name:	
	NetID:	
	Email:	
	Signature:	Date:

F2: OSR Central Office Roles		<input type="checkbox"/> Access Requested
OSR Security Administrator <input type="checkbox"/> Request Approved <input type="checkbox"/> Request Denied	Route to Security Administrator, OSR, 1801 Maple, Suite 2410, EV Campus	
	Print Name:	
	NetID:	
	Email:	
	Signature:	Date:



FFRA Systems Central Security Access Form

G: ORS Central Office Roles		<input type="checkbox"/> Access Requested
ORS Security Administrator <input type="checkbox"/> Request Approved <input type="checkbox"/> Request Denied	Route to Security Administrator, ORS, 2145 Sheridan, EV Campus	
	Print Name:	
	NetID:	
	Email:	
	Signature:	Date:

H: Procurement Central Office Roles		<input type="checkbox"/> Access Requested
or PRS 202 Administrator <input type="checkbox"/> Request Approved <input type="checkbox"/> Request Denied	Route to Security Administrator, PRS, 2020 Ridge, EV Campus	
	Print Name:	
	NetID:	
	Email:	
	Signature:	Date:

I: Budget Office Central Office		<input type="checkbox"/> Access Requested
PRS Security Administrator <input type="checkbox"/> Request Approved <input type="checkbox"/> Request Denied	Route to Security Administrator, Budget Office, 633 Clark, EV Campus	
	Print Name:	
	NetID:	
	Email:	
	Signature:	Date:

J–M: Financial Operations IT Central Office		<input type="checkbox"/> Access Requested
Financial Operations IT Security Administrator <input type="checkbox"/> Request Approved <input type="checkbox"/> Request Denied	Route to Security Administrator, Financial Operations IT, 619 Clark, EV Campus	
	Print Name:	
	NetID:	
	Email:	
	Signature:	Date:

Security Processing	
FOIT Security Administrator	
Received by:	Date Received:
Completed by:	Date Completed:
	Date Applicant Notified:
Listserv(s) Subscription:	<input type="checkbox"/> Add <input type="checkbox"/> Remove
	FFRA_ALL_USERS [includes Shopper and Expenses]
	<input type="checkbox"/> Add <input type="checkbox"/> Remove
	FFRA_CORE_USERS [excludes those with ONLY Shopper and Expenses]
	<input type="checkbox"/> Add <input type="checkbox"/> Remove
	InfoEd-PD-Users

BI Security Processing	
JIRA ticket:	Submitted by:
	Date Submitted:
	Date Notified of Completion: