ESAF 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–R (pgs. 2 - 13)
   **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 (pgs. 14-15)
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. 14-15)
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:
   foitsecurity@northwestern.edu

SECTION A

***Date**	
***NetID**	
***Name (Last, First MI)**	
***HRIS EMPLID**	
***NU Email**	
***Department**	
Title	
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, I–R)	☐ **ADD**	☐ **INACTIVATE**	☐ **MODIFY**
Workflow (Section C)	☐ **ADD**	☐ **INACTIVATE**	☐ **MODIFY**
ChartField Security / Row Level Security (Section D)	☐ **ADD**	☐ **INACTIVATE**	☐ **MODIFY**
Facilities Management (Section E)	☐ **ADD**	☐ **INACTIVATE**	☐ **MODIFY**
Grants Management (Section F)	☐ **ADD**	☐ **INACTIVATE**	☐ **MODIFY**
NUPlans (Section H)	☐ **ADD**	☐ **INACTIVATE**	☐ **MODIFY**
SciQuest (Section I2)	☐ **ADD**	☐ **INACTIVATE**	☐ **MODIFY**

Is this a School or Department transfer? ☐ **Yes** ☐ **No**
(Please note all previous FFRA Security Access is removed for transferred users)

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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–F.

ADD	DEL	GENERAL ACCESS	
☐	☐	Employee Self Service	Basic user inquiry access provisioned to every Northwestern Employee. Overview of access available at Role Descriptions webpage. - No Workflow Approval - Can self-certify Expense Reports
☐	☐	School/Department Staff	Inquiry access for purchasing, accounts payable, and accounts receivable, in addition to basic user inquiry access. Overview of access available at Role Descriptions webpage. - Optional: Workflow Approval – complete Workflow Approval Access on page 3 - Reporting: To view Cognos Reports – complete ChartField Security Access on page 2
☐	☐	Salary Access	Access to drilldown into GL008 Cognos Report – allow processing time for HR approval - Requires HRS101 Training - Access applies to all assigned ChartField values. Complete ChartField Security Access on page 3.
☐	☐	Supplier Contract Administrator	Access to participate in supplier contract process
☐	☐	SES Tuition Encumbrance	Access to Student Enterprise System tuition encumbrance data - Access applies to all assigned ChartField values. Complete ChartField Security Access on page 3.
☐	☐	ChartField Manager Entry	Access to enter and update managers, reviewers and attributes for ChartField (CF) values; assigned CF managers automatically receive Row Level Security access to the CF. Detailed description at Role Descriptions webpage.

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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, payment requests 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, Payment Request Approval and Journal Approval roles.

Specifying Dept Budget Approval grants the Budget Journal Approval role.

Specifying ChartField Request Approver grants the PG-GL-Field Request Approver 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**
	Specify Departments, Department Tree Nodes and/or DeptID Range
ChartField Request Approver	☐ **Add** ☐ **Remove**
	Source Tree Node
Direct Journal Approver	☐ **Add** ☐ **Remove**

SECTION D: CHARTFIELD SECURITY ACCESS (ROW LEVEL SECURITY)

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**

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SECTION E: FACILITIES MANAGEMENT ACCESS

Model Facilities Management Access after Existing User

Print Name: **NetID:**

ADD	DEL	FAMIS COGNOS Reporting, Generate and View reports in central folders indicated below	
☐	☐	Facilities	Access to delivered reports in this folder. (CEN_FACILITIES)
☐	☐	COGNOS	Cognos Ad Hoc Reporting. (CAFE_FAMIS_ADHOC)
ADD	**DEL**	**FACILITIES CONNECT ROLES – SPACE MODULE**	
☐	☐	AutoCAD Technician	Update, verify and maintain AutoCAD drawings.
☐	☐	Space Information Manager	Accept space requests, manage the space validation process and run high level reports.
ADD	**DEL**	**FACILITIES CONNECT ROLES – CAPITAL PROJECTS MODULE**	
☐	☐	Capital – Financial Supervisor	Facilities users with access to all three modules requiring financial oversight and job costing capabilities
☐	☐	Capital – Program Manager	Facilities Program Managers and senior leaders who oversee Capital Project managers
☐	☐	Capital – Project Manager	Facilities Project Managers who are responsible for managing Capital Projects within the module
ADD	**DEL**	**FACILITIES CONNECT ROLES – OPERATIONS & MAINTENANCE MODULE**	
☐	☐	O&M – Accounting Assistant	Facilities Administrative clerical support employees who have responsibility for labor and materials entries and other support functions across modules.
☐	☐	O&M – Asset Manager	Facilities employees with specific access to all Asset and Preventive Maintenance functionality
☐	☐	O&M – Contact Center Agent	Facilities Customer Service agents with access to create and assign work tasks, capital projects, maintain billing information, and perform queries as to task status.
☐	☐	O&M – Contact Center Manager	Facilities Customer Service agents with access to create and assign work tasks, capital projects, maintain billing information, and perform queries as to task status.
☐	☐	O&M – Elevator Manager	Facilities employees with direct oversight of external Elevator technicians with access and insight to Capital Projects and Operations & Maintenance functionality
☐	☐	O&M – External Vendor	Facilities resources external to the university with access to work tasks
☐	☐	O&M – Human Resources	Facilities Human Resources employees with access to maintain Facilities specific personnel information within Facilities Connect
☐	☐	O&M – Key Locksmith	Facilities Lock Shop employees with access to Operations & Maintenance and key information
☐	☐	O&M – Key Manager	Facilities Lock Shop employees with access to Operations & Maintenance and advanced access to key information
☐	☐	O&M – Key Supervisor	Facilities Lock Shop employees with supervisory responsibility, access to Operations & Maintenance and advanced access to key information
☐	☐	O&M – OM Admin	Facilities Administrative support with access to the Operations & Maintenance module who work in direct support of Facilities shop personnel
☐	☐	O&M – Service Manager	Facilities Operations personnel with access to Operations & Maintenance module who are direct supervisors of Facilities shops with access to work task management, scheduling, and labor approvals
☐	☐	O&M – Service Technician	Facilities Operations personnel with access to Operations & Maintenance module who are members of Facilities shops with emphasis on service request and work task management
☐	☐	O&M – Warehouse Associate	Facilities employees with specific access to inventory management functionality
☐	☐	O&M – Warehouse Manager	Facilities employees with specific access to inventory management functionality and supervisory responsibilities

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SECTION E: FACILITIES ACCESS

Model Facilities Connect Access after Existing User

Print Name: **NetID:**

ADD	DEL	FACILITIES CONNECT ROLES – SPACE MODULE	
☐	☐	Read Only	View only access to space information
☐	☐	Department Data Steward	Edit and verify space information details, approve department assignment change requests and review the Space Validation process ***Specify NUFinancials DeptID(s) below.**
☐	☐	Department Data Administrator	Edit and verify space information details, complete the yearly Space Validation process ***Specify NUFinancials DeptID(s) below.**

***Department Data Administrator/Steward**– specify DeptID(s); attach a separate list if needed

Specify Departments	☐ **Add** ☐ **Remove**
	☐ **Add** ☐ **Remove**
	☐ **Add** ☐ **Remove**

ADD	DEL	FACILITIES CONNECT ROLES – OPERATIONS & MAINTENANCE MODULE	
☐	☐	NUIT – Support Center	Users in Northwestern IT's Tier 2 Support Center who will triage incoming Facilities Connect support requests.
☐	☐	O&M – NUPD	University Police users with access to create Service Requests for Facilities personnel during non-business hours
☐	☐	O&M – Risk/Environmental Manager	Risk Management users with access to the Maintenance module in order to create safety procedures and service requests
☐	☐	O&M – General Requestor	Create and inquire on Facilities Service Requests
☐	☐	O&M – General Requestor – Approver	Create and inquire on Facilities Service Requests and are able to approve Facilities requests against designated Chart Strings

WORKFLOW (PROVIDES ACCESS TO APPROVE FACILITIES CONNECT SERVICE REQUESTS)

Model Facilities Connect Access after Existing User:

Print Name: **NetID:**

Specify NUFinancials Departments or Department Tree Nodes (for more than 3, please provide on separate sheet)	☐ **Add** ☐ **Remove**
	☐ **Add** ☐ **Remove**
	☐ **Add** ☐ **Remove**

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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.

CERES General Access			
Proposal & Award Acceptance (SR Only)	☐ **Add** ☐ **Remove**	Award Management (SR Only)	☐ **Add** ☐ **Remove**
Contracts & Negotiations (SR Only)	☐ **Add** ☐ **Remove**	Subcontracts Management (SR Only)	☐ **Add** ☐ **Remove**
Business Systems & Operations (SR Only)	☐ **Add** ☐ **Remove**	Other (SR Only)	☐ **Add** ☐ **Remove**
BSO-SAD (SR Only)	☐ **Add** ☐ **Remove**	Grants View Only	☐ **Add** ☐ **Remove**
Agreements View Only	☐ **Add** ☐ **Remove**	Research Portal Sponsored Salary Access	☐ **Add** ☐ **Remove**

InfoEd Report Access			
COGNOS: Report User (CAFÉ_IE_RESEACH_FACULTY)	☐ **Add** ☐ **Remove**	COGNOS: Query Studio	☐ **Add** ☐ **Remove**
BI Publisher: Sub-K Database	☐ **Add** ☐ **Remove**		

You may specify a tree node to grant access for multiple departments.	
Specify Departments or Department Tree Nodes	☐ **Add** ☐ **Remove**
	☐ **Add** ☐ **Remove**
	☐ **Add** ☐ **Remove**

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SECTION F2: OSR CENTRAL OFFICE ROLES

Model OSR Access after Existing User

Print Name: **NetID:**

ADD	DEL		
☐	☐	OSR Award Setup	Run InfoEd to NUFinancials interface, review errors. Generate awards. PG-GM-OSR_Award Setup
☐	☐	OSR Award Admin	Update use award, project, project team and project status. Post new grant budgets. Modify existing grant budgets. PG-GM-OSR_Award Admin
☐	☐	OSR Add Project	Add new projects and activities to existing contracts. PG-GM-OSR_AddProjAct
☐	☐	OSR InfoTeam	Update institution, department, and professional profiles configuration. PG-GM-OSR_InfoTeam

SECTION G: OFFICE OF RESEARCH SAFETY CENTRAL OFFICE ROLES

Model ORS Access after Existing User

Print Name: **NetID:**

ADD	DEL		
☐	☐	Research Safety Approval	Approve restricted research material purchases.

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SECTION H: NUPLANS

MODEL NUPLANS ROLES AFTER EXISTING USER (optional)

Print Name: **NetID:**

NUPlans is specialized software used for annual budget preparation and forecasting process. The two separate systems, *Budget* and *Forecasting*, is built on a Cognos TM1 platform that will provide for better planning and analysis of budget data as well as security and workflow options.

NUPlans Budgeting Roles

Prep File	☐ **Add** ☐ **Remove**	General	☐ **Add** ☐ **Remove**	Planner	☐ **Add** ☐ **Remove**	Grants	☐ **Add** ☐ **Remove**
Commitments	☐ **Add** ☐ **Remove**	Reports	☐ **Add** ☐ **Remove**	Create Version 2	☐ **Add** ☐ **Remove**	Create Version 3	☐ **Add** ☐ **Remove**
Salary	☐ **Add** ☐ **Remove**	Salary - Confidential	☐ **Add** ☐ **Remove**				

NUPlans Budgeting Data Access

Budget Grouping	Access (Edit, Submit, View)	Department	Project	Excluded Project Flag	Salary Account Access

NUPlans Forecasting Roles

Prep File	☐ **Add** ☐ **Remove**	Forecast	☐ **Add** ☐ **Remove**	Grants	☐ **Add** ☐ **Remove**	Tuition	☐ **Add** ☐ **Remove**
Reports	☐ **Add** ☐ **Remove**	Salary	☐ **Add** ☐ **Remove**	Commitments	☐ **Add** ☐ **Remove**		

NUPlans Forecasting Data Access

Budget Grouping	Access (Read or Write)	Department	Project	Excluded Project Flag

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SECTION I: PROCUREMENT CENTRAL OFFICE ACCESS

Model Procurement Access after Existing User

Print Name: **NetID:**

ADD	DEL		
☐	☐	PRS Approver	Approve blanket order requisitions and requisitions $25,000 and over.
☐	☐	Central	Add purchase orders on-line, Generate and dispatch purchase orders via batch. Process change orders. PG-PV-Central
☐	☐	Inquiry Pro	Purchasing orders status inquiry. PG-PV-Inquiry Pro
☐	☐	SCIQUEST Admin	Enable SciQuest suppliers in NUFinancials. Does not include access to create NUFinancials vendors or enable SciQuest vendors or catalogs. PG-PV-SCIQUEST Admin
☐	☐	PRS Admin	Add/update ship to, location, and category configuration. PG-PV-PRS Admin
☐	☐	POC Analyst	Review and process PO Change Order requests submitted by requesters. PG-PV-POC Analyst
ADD	**DEL**	**COGNOS Reporting, Generate and View reports in central folders indicated below**	
☐	☐	Supply Chain	Access to delivered reports in this folder. CEN_SUPPLY_CHAIN

ADD	DEL	SECTION I2: SCI-QUEST ADMINISTRATION ACCESS	
☐	☐	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.
☐	☐	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.
☐	☐	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.
☐	☐	Accounts Payable	Accounts Payable Staff. View all invoices, change own password

SECTION J: SUPPLIER CONTRACT MANAGEMENT ACCESS

Model Procurement Access after Existing User

Print Name: **NetID:**

ADD	DEL		
☐	☐	Contract Administrator	Allows a user to author and import documents into the system, route documents for signing, update contract statuses in the system. PG-CS-Contract-Admin
☐	☐	Contract Agreements	Allows a Contract Adminstrator to update contract agreements such as service level or internal agreements. PG-CS-Contract Agreements
☐	☐	Contract Collaborator	Allows a user to view and edit a document based on the preference selections made by the Contract Administrator who includes them in their collaboration. PG-CS Collaborator
☐	☐	Contract Inquiry	Allows a user to view delivered Supplier Contract reports and queries. PG-CS-Inquiry
☐	☐	Contract Librarian	Allows a user at the Unit or School level to build and maintain contract templates using approved clauses for use by the rest of the Northwestern Community. PG-CS-Librarian SCH
☐	☐	Clause Approver - PPS	Allows a Central PPS Clause Approver to approve new or updated clauses developed for contract templates. PS-CS-Clause-APP-PPS
☐	☐	Clause Approver - OGC	Allows an OGC Clause Approver to approve new or updated clauses developed for contract templates. PS-CS-Clause-APP-OGC
☐	☐	Clause Approver – Risk Mgmt	Allows a Risk Management Clause Approver to approve new or updated clauses developed for contract templates. PS-CS-Clause-APP-RSK
☐	☐	Clause Approver - IT	Allows an IT Clause Approver to approve new or updated clauses developed for contract templates. PS-CS-Clause-APP-IT
☐	☐	Clause Approver - DATA	Allows an IT Clause Approver to approve new or updated clauses related to ISSC/Data Security. PS-CS-Clause-APP-DATA
☐	☐	Clause Approver - Export	Allows an Export Controls Compliance Clause Approver to approve new or updated clauses developed for contract templates. PS-CS-Clause-APP-EXPORT
☐	☐	Clause Approver – PCI	Allows a Financial Operations Clause Approver to approve new or updated clauses related to Payment Card Industry . PS-CS-Clause-APP-PCI
☐	☐	Configurations Administrator	Allows an Administrative Systems user full access to all pages and associated permissions to set-up, configure, maintain and troubleshoot issues. PS-CS-CONGIF_ADMIN

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SECTION K: BUDGET OFFICE CENTRAL OFFICE ROLES

Model Budget Office Access after Existing User

Print Name: **NetID:**

ADD	DEL		
☐	☐	Budget Office Approver	Authorization to provide Budget Office approval. Budget transactions equal to or exceeding $50,000 require Budget Office approval.
☐	☐	Budget Office Analyst	Commitment Control inquiry. Budget journal entry, approval and posting. General Ledger inquiry. NUFinancials General Ledger reports. PG-GL-Budget Office Analyst
☐	☐	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. PG-GL-Budget Office Approver
☐	☐	Budget Journal Deletion	Delete budget journals. PG-GL-Budget Journal Deletion
☐	☐	Budget Office Super User	PG-GL-Budget Office Approver access with the following additional access: Year end budget close and Commitment Control configuration inquiry. PG-GL-Budget Office Super-user
ADD	**DEL**	**COGNOS Reporting, Generate and View reports in central folders indicated below**	
☐	☐	Budget	Access to delivered reports in this folder. CEN_BUDG

SECTION L: ASRSP CENTRAL OFFICE ROLES

Model ASRSP Access after Existing User

Print Name: **NetID:**

ADD	DEL		
☐	☐	ASRSP Approver	Approve Grants related expenses $2,500 and over. Grants travel, consulting and subcontractor expenses.
☐	☐	Accounting Rep subk	Update award profiles. PG-GM-ASRSP Accntg Rep_subk
☐	☐	ASRSP BI Specialist	Update access to contracts. Generate invoices and establish milestones/events for prepaid, scheduled and fixed price awards. PG-GM-ASRSP_BI Specialist
☐	☐	ASRSP BI Adjuster	Credit and rebill invoices. PG-GM-ASRSP_BI Adjuster
☐	☐	ASRSP BI LOC	Process LOC draw amounts. PG-GM-ASRSP_BI - LOC
☐	☐	ASRSP Contract Activate	Activate contracts. PG-GM-ASRSP_Contract Activate
☐	☐	ASRSP AR Depositor	Enter deposits. PG-GM-ASRSP_AR_Depositor
☐	☐	ASRSP AR Payment	Apply payments. PG-GM-ASRSP_AR Payment
☐	☐	ASRSP AR Specialist	Approve deposits, update access to AR maintenance, collection, and conversation pages. Run aging and create dunning letters. Correct AR posting errors. PG-GM-ASRSP_AR Specialist
☐	☐	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. PG-GM-ASRSP_InfoTeam
☐	☐	Grants FA NU Rates	Update Institution F&A Rates. PG-GM-Grants_FA_NU Rates
☐	☐	Grants FA Offsets	Update F&A Offsets configuration. PG-GM-Grants_FA_Offsets
☐	☐	Accounting Services Invoicer	Enter and maintain AR information for non-grants receivables. Create AR entries, add/update customer data. PG-GM-Accntg_Srvcs_Invoicer
☐	☐	Accounting Services Reconciler	Update banking information, AR maintenance, collection, and conversation pages. PG-GM-Accntg_Srvcs_Reconciler
☐	☐	Post Reporter	Run post award reports (SF272, SF269, F&A error report, and award budget inquiry). PG-GM-Post_Reporter
☐	☐	Cash AR Reporter	Run aging reports and general AR reports by customer. PG-GM-Cash_AR_Reporter
☐	☐	Sponsor Profile Maintenance	Update sponsor profile. Review InfoEd to NUFinancials sponsor interface errors. PG-GM-Sponsor Profile Maint
☐	☐	Grants Project Team	Add or delete Team Members (PI, Co-PI, RADM, etc.) to the Project Team. PG-GM-Grants Project Team
☐	☐	Project Costing View Only	View Project ID information in Project Costing, including detailed descriptions.PG-GM-Project Cost View Only
ADD	**DEL**	**COGNOS Reporting, Generate and View reports in central folders indicated below**	
☐	☐	Sponsored Programs Mgt	Access to delivered reports in this folder. CEN_SPO_PRGS_MNGT
☐	☐	Sponsored Programs Mgt - Restricted	Access to delivered reports in this folder. CEN_SPO_PRGS_MNGT_RESTRICTED

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SECTION M: PAYABLES/TRAVEL & EXPENSE CENTRAL OFFICE ACCESS

Model Payables/Travel & Expense Access after Existing User

Print Name: **NetID:**

ADD	DEL		
☐	☐	AP 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. PG-EX-Auditor
☐	☐	AP Expenses Manager	Update select employee data, including bank account data and user defaults. Update select configuration settings. Run expense processing process. PG-EX-Manager
☐	☐	AP Manager	AP Manager. Voucher entry, express check entry, match exception override, pay cycle, voucher post, budget check, matching. View access to vendor data. PG-AP-Manager
☐	☐	AP Supervisor	AP Supervisor. Process express checks, control groups, voucher build, voucher post, budget check, matching, payment post, paycycle. PG-AP-Supervisor
☐	☐	AP Voucher Entry	Voucher entry, match workbench, receipt entry. **Note: If user has the PG-AP-Payment-Request role, do not add this role to their profile.** PG-AP-Entry
☐	☐	AP Inquiry	View voucher data, basic vendor data, payment history. PG-AP-Inquiry
☐	☐	Accounting Services Voucher	Voucher entry. **Note: If user has the PG-AP-Payment-Request role, do not add this role to their profile.** PG-AP-Accnt-Srvcs
☐	☐	Accounting Services Voucher Approval	Voucher approval. PG-AP-Accnt-Srvcs-Apprv
☐	☐	Vendor Maintenance	Add/update vendors. Full access to vendor data. PG-AP-VndrMaint
☐	☐	Vendor Review and Validate	Review, validate and change status on saved and submitted Vendor Requests using the eCustoms database. PG-AP-Vendor-Validate
☐	☐	1099	1099 processing. PG-AP-1099
☐	☐	Match Exception	PRS/Interface Review. View only access to AP match errors. PG-AP-Match-Exception
☐	☐	Interface Review	SES/Voyager interface owners, voucher view. PG-AP-Interface-Review
☐	☐	Receipt Accrual	Review and run receipt accrual, PO budget year end processing. PG-AP-Rcpt-Accrual
ADD	**DEL**	**COGNOS Reporting, Generate and View reports in central folders indicated below**	
☐	☐	Vendor Maintenance	Access to delivered reports in this folder.
☐	☐	Voyager	Access to delivered reports in this folder. CEN_VOYAGER

SECTION N: PROCUREMENT AND PAYMENTS ACCESS

Model Payables/Travel & Expense Access after Existing User

Print Name: **NetID:**

ADD	DEL		
☐	☐	Payment Request Update	View and modify Payment Requests entered by other users. *Assigned to Central AP Approvers. PG-AP-Pymnt-Request-Update-All
☐	☐	PPS PO Change Approver	Add and update display access to review/edit, create/submit and approve a PO change order. PG-PV-PPS-POC Approver
☐	☐	PPS Admin Buyer Approver	Display Only access to review the Add/Update PO pages and to apply approval. PG-PV-PPS-Admin Buyer Approver

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SECTION O: GENERAL LEDGER CENTRAL OFFICE ROLES

Model General Ledger Access after Existing User

Print Name: **NetID:**

ADD	DEL		
☐	☐	Accounting Srv NUJrnl Approver	Approve journals created via the actuals journal portal. PG-GL-Acct Srv NUJrnl Approver
☐	☐	Accounting Srv Jrnl Entry	Enter Actuals journals via portal and NUFinancials pages. Commitment control and General Ledger inquiry. Save, edit, budget check journals. PG-GL-Acctng Srvcs Jrnl Entry
☐	☐	Accounting Srv 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. PG-GL-Accntg Srvcs Jrnl Review
☐	☐	Mark Journals to Post	Mark Journals to post. PG-GL-Mark Journals to Post
☐	☐	Accounting Srv Jrnl Post	Post journals. PG-GL-Accntg Srvcs Jrnl Post
☐	☐	Accounting Srv Reports	General Ledger reports, Commitment Control and General Ledger inquiry. Ability to execute Nvision reports. PG-GL-Accntg Srvcs Reports
☐	☐	Accounting Srv Config	Allocations, bank account, year end close, ledger, journal, setup pages. PG-GL-Acctng Srvcs Config
☐	☐	Accounting Services 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. PG-GL Acctng Srvcs Super-User
☐	☐	Accounting Srv Jrnl Delete	Accounting Services Manager, receive notifications for journal delete requests. PG-GL-Accntg Srvcs Jrnl Delet
☐	☐	Accounting Srv CF Maintenance	Has ability to add and update chart field values. PG-GL-Accntg Srvcs CF Maint
☐	☐	Accounting Srv Tree Maintenance	Add, update trees. PG-GL-Accntg Srvcs Tree Maint
☐	☐	Inquiry with Attribute	PG-GL-KK Inquiry access with the following additional access: Budget attributes inquiry. PG-GL-KK Inquiry with Attribut
☐	☐	Bursar's Office CRT Access	Enter, review, and post CRT entries. PG-GL-Bursars Offce CRT Access
☐	☐	OSR Control Budget Attributes	Edit budget attributes. This role is not currently active but has been created for future use. PG-GL-OSR Control Buds
☐	☐	P-Card 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. PG-PV-Pcard Admin
☐	☐	GL Reports	Access for only online NUFinancials GL Reports. PG-GL-Ledger Reports
☐	☐	Accounting Srv Jrnl Susp	Correct suspended Journals. PG-GL-Accntg Srvcs Jrnl Susp
☐	☐	AM Transaction Process	Create and process Asset physical and financial information. PG-NU-AM Transaction Process
ADD	**DEL**	**COGNOS Reporting, Generate and View reports in central folders indicated below**	
☐	☐	Accounting Services	Access to delivered reports in this folder. CEN_ACC_SERV

SECTION P: BANK RECONCILIATION CENTRAL OFFICE ROLES

Model Bank Reconciliation Access after Existing User

Print Name: **NetID:**

ADD	DEL		
☐	☐	Bank Reconciliation Mgr	Bank reconciliation setup and processing. PG-GL-Bank Reconciliation Mgr
☐	☐	Bank Reconciliation Review	Bank reconciliation inquiry pages. PG-GL-Bank Reconciliation Review
☐	☐	NT Investment User	Import and roll back Northern Trust Investment transactions. Import/reload primary NTFUND to PS chart string mapping table. PG-GL-NT_Investment_User

SECTION Q: QUERY ACCESS

Model Payables/Travel & Expense Access after Existing User

Print Name: **NetID:**

Due to access to sensitive data, additional steps are taken to enhance the security around granting query access. You will be contacted to complete a questionnaire which will be reviewed by the Controller.

ADD	DEL		
☐	☐	Query Viewer	Run public NUFinancials queries. QY-NU-Query Viewer
☐	☐	Query Create	Create NUFinancials queries. QY-NU-Query Create

☐	☐	Query Scheduler	Schedule NUFinancials queries. QY-NU-Query Scheduler

SECTION R: TREASURY ACCESS

Model Payables/Travel & Expense Access after Existing User

Print Name: **NetID:**

ADD	DEL		
☐	☐	Treasury Transfer Template Create	Create transfer and accounting templates in cash management (used on both transfer requests and bank statement accounting). PG-GL-TR-Trns-Temp-Create
☐	☐	Treasury Transfer Template Approver	Approve transfer templates in cash management. PG-GL-TR-Trns-Temp-Approver
☐	☐	Treasury Transfer Create	Requests EFT and bank account transfers in cash management. PG-GL-TR-Trns-Create
☐	☐	Treasury Transfer Approver	Approve transfer requests in cash management. PG-GL-TR-Trns-Approver
☐	☐	Treasury Accounting Entry	Modify accounting entries created from accounting templates in cash management. PG-GL-TR-Accntg-Entry
☐	☐	Treasury Accounting Approver	Approve modified accounting entries in cash management. PG-GL-TR-Accntg-Approver

ESAF 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/docs/StandardsforBusinessConduct.pdf.

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	☐ **Access Requested**	
Applicant's Department Head	**Print Name:**	
	NetID:	
☐ **Request Approved**	**Email:**	
☐ **Request Denied**	**Signature:**	**Date:**

E: Facilities Management Central Office	☐ **Access Requested**	
Facilities Mgt Security Admin	**Route to Security Administrator, Facilities Mgt, 2020 Ridge, EV Campus**	
	Print Name:	
	NetID:	
☐ **Request Approved**	**Email:**	
☐ **Request Denied**	**Signature:**	**Date:**

F: Grants Department Roles	☐ **Access Requested**	
Dean's Office, Security Administrator	**Enter Route to:** ______________________________	
	Print Name:	
	NetID:	
☐ **Request Approved**	**Email:**	
☐ **Request Denied**	**Signature:**	**Date:**
OSR Security Administrator	**Route to Security Administrator, OSR, 633 Clark, EV Campus**	
	Print Name:	
	NetID:	
☐ **Request Approved**	**Email:**	
☐ **Request Denied**	**Signature:**	**Date:**

F2: OSR Central Office Roles	☐ **Access Requested**	
OSR Security Administrator	**Route to Security Administrator, OSR, 633 Clark, EV Campus**	
	Print Name:	
	NetID:	
☐ **Request Approved**	**Email:**	
☐ **Request Denied**	**Signature:**	**Date:**

ESAF Systems Central Security Access Form

G: ORS Central Office Roles	☐ Access Requested
ORS Security Administrator	Route to Security Administrator, ORS, 2145 Sheridan, EV Campus
	Print Name:
	NetID:
☐ Request Approved	Email:
☐ Request Denied	Signature: Date:

I-J: Procurement Central Office Roles	☐ Access Requested
PPS Administrator	Route to Security Administrator, PRS, 2020 Ridge, EV Campus
	Print Name:
	NetID:
☐ Request Approved	Email:
☐ Request Denied	Signature: Date:

K: Budget Office Central Office	☐ Access Requested
Budget Office Security Administrator	Route to Security Administrator, Budget Office, 633 Clark, EV Campus
	Print Name:
	NetID:
☐ Request Approved	Email:
☐ Request Denied	Signature: Date:

M–R: Financial Operations IT Central Office	☐ Access Requested
Financial Operations IT Security Administrator	Route to Security Administrator, Financial Operations IT, 555 Clark, EV Campus
	Print Name:
	NetID:
☐ Request Approved	Email:
☐ Request Denied	Signature: Date:

FOIT Security Processing		
Date Received:	Date Completed:	Completed By: