

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) | <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 |
| ChartField Security / 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 |
| NUPlans (Section H) | <input type="checkbox"/> ADD | <input type="checkbox"/> INACTIVATE | <input type="checkbox"/> MODIFY |
| SciQuest (Section I2) | <input type="checkbox"/> ADD | <input type="checkbox"/> INACTIVATE | <input type="checkbox"/> MODIFY |

Is this a School or Department transfer?	<input type="checkbox"/> Yes <input type="checkbox"/> No
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(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.

A D
D E
D L **GENERAL ACCESS**

- | | | | |
|--------------------------|--------------------------|---------------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | 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 |
| <hr/> | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | 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 |
| <hr/> | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | 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. |
| <hr/> | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | Supplier Contract Administrator | Access to participate in supplier contract process |
| <hr/> | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | 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. |
| <hr/> | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | 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)	<input type="checkbox"/> Add <input type="checkbox"/> Remove
Dept Approval, Level 2 (\$1,500-\$4,999)	<input type="checkbox"/> Add <input type="checkbox"/> Remove
Dept Approval, Level 3 (\$5,000 and up)	<input type="checkbox"/> Add <input type="checkbox"/> Remove
Dept Budget Approval	<input type="checkbox"/> Add <input type="checkbox"/> Remove

Projects

Project Pre-Approval	<input type="checkbox"/> Add <input type="checkbox"/> Remove
	<input type="checkbox"/> Add <input type="checkbox"/> Remove
	<input type="checkbox"/> Add <input type="checkbox"/> Remove

Specify Departments, Department Tree Nodes and/or DeptID Range

ChartField Request Approver	<input type="checkbox"/> Add <input type="checkbox"/> Remove
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Source Tree Node

Direct Journal Approver	<input type="checkbox"/> Add <input type="checkbox"/> Remove
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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	<input type="checkbox"/> Add <input type="checkbox"/> Remove
	<input type="checkbox"/> Add <input type="checkbox"/> Remove
	<input type="checkbox"/> Add <input type="checkbox"/> Remove
Specify Projects	<input type="checkbox"/> Add <input type="checkbox"/> Remove
	<input type="checkbox"/> Add <input type="checkbox"/> Remove
	<input type="checkbox"/> Add <input type="checkbox"/> Remove

ESAF Systems Central Security Access Form

SECTION E: FACILITIES MANAGEMENT ACCESS

Model Facilities Management Access after Existing User

Print Name:

NetID:

A D D	D E L	FAMIS COGNOS Reporting, Generate and View reports in central folders indicated below
<input type="checkbox"/>	<input type="checkbox"/>	Facilities Access to delivered reports in this folder. (CEN_FACILITIES)
<input type="checkbox"/>	<input type="checkbox"/>	COGNOS Cognos Ad Hoc Reporting. (CAFE_FAMIS_ADHOC)
A D D	D E L	FACILITIES CONNECT ROLES – SPACE MODULE
<input type="checkbox"/>	<input type="checkbox"/>	AutoCAD Technician Update, verify and maintain AutoCAD drawings.
<input type="checkbox"/>	<input type="checkbox"/>	Space Information Manager Accept space requests, manage the space validation process and run high level reports.
A D D	D E L	FACILITIES CONNECT ROLES – CAPITAL PROJECTS MODULE
<input type="checkbox"/>	<input type="checkbox"/>	Capital – Financial Supervisor Facilities users with access to all three modules requiring financial oversight and job costing capabilities
<input type="checkbox"/>	<input type="checkbox"/>	Capital – Program Manager Facilities Program Managers and senior leaders who oversee Capital Project managers
<input type="checkbox"/>	<input type="checkbox"/>	Capital – Project Manager Facilities Project Managers who are responsible for managing Capital Projects within the module
A D D	D E L	FACILITIES CONNECT ROLES – OPERATIONS & MAINTENANCE MODULE
<input type="checkbox"/>	<input type="checkbox"/>	O&M – Accounting Assistant Facilities Administrative clerical support employees who have responsibility for labor and materials entries and other support functions across modules.
<input type="checkbox"/>	<input type="checkbox"/>	O&M – Asset Manager Facilities employees with specific access to all Asset and Preventive Maintenance functionality
<input type="checkbox"/>	<input type="checkbox"/>	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.
<input type="checkbox"/>	<input type="checkbox"/>	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.
<input type="checkbox"/>	<input type="checkbox"/>	O&M – Elevator Manager Facilities employees with direct oversight of external Elevator technicians with access and insight to Capital Projects and Operations & Maintenance functionality
<input type="checkbox"/>	<input type="checkbox"/>	O&M – External Vendor Facilities resources external to the university with access to work tasks
<input type="checkbox"/>	<input type="checkbox"/>	O&M – Human Resources Facilities Human Resources employees with access to maintain Facilities specific personnel information within Facilities Connect
<input type="checkbox"/>	<input type="checkbox"/>	O&M – Key Locksmith Facilities Lock Shop employees with access to Operations & Maintenance and key information
<input type="checkbox"/>	<input type="checkbox"/>	O&M – Key Manager Facilities Lock Shop employees with access to Operations & Maintenance and advanced access to key information
<input type="checkbox"/>	<input type="checkbox"/>	O&M – Key Supervisor Facilities Lock Shop employees with supervisory responsibility, access to Operations & Maintenance and advanced access to key information
<input type="checkbox"/>	<input type="checkbox"/>	O&M – OM Admin Facilities Administrative support with access to the Operations & Maintenance module who work in direct support of Facilities shop personnel
<input type="checkbox"/>	<input type="checkbox"/>	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
<input type="checkbox"/>	<input type="checkbox"/>	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
<input type="checkbox"/>	<input type="checkbox"/>	O&M – Warehouse Associate Facilities employees with specific access to inventory management functionality
<input type="checkbox"/>	<input type="checkbox"/>	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:

A D D	D E L	FACILITIES CONNECT ROLES – SPACE MODULE
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|--------------------------|--------------------------|-------------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Read Only | View only access to space information |
| <input type="checkbox"/> | <input type="checkbox"/> | 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. |
| <input type="checkbox"/> | <input type="checkbox"/> | 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	<input type="checkbox"/> Add <input type="checkbox"/> Remove
	<input type="checkbox"/> Add <input type="checkbox"/> Remove
	<input type="checkbox"/> Add <input type="checkbox"/> Remove

A D D	D E L	FACILITIES CONNECT ROLES – OPERATIONS & MAINTENANCE MODULE
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|--------------------------|--------------------------|------------------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | NUIT – Support Center | Users in Northwestern IT's Tier 2 Support Center who will triage incoming Facilities Connect support requests. |
| <input type="checkbox"/> | <input type="checkbox"/> | O&M – NUPD | University Police users with access to create Service Requests for Facilities personnel during non-business hours |
| <input type="checkbox"/> | <input type="checkbox"/> | O&M – Risk/Environmental Manager | Risk Management users with access to the Maintenance module in order to create safety procedures and service requests |
| <input type="checkbox"/> | <input type="checkbox"/> | O&M – General Requestor | Create and inquire on Facilities Service Requests |
| <input type="checkbox"/> | <input type="checkbox"/> | 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)	<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 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)	<input type="checkbox"/> Add <input type="checkbox"/> Remove	Award Management (SR Only)	<input type="checkbox"/> Add <input type="checkbox"/> Remove
Contracts & Negotiations (SR Only)	<input type="checkbox"/> Add <input type="checkbox"/> Remove	Subcontracts Management (SR Only)	<input type="checkbox"/> Add <input type="checkbox"/> Remove
Business Systems & Operations (SR Only)	<input type="checkbox"/> Add <input type="checkbox"/> Remove	Other (SR Only)	<input type="checkbox"/> Add <input type="checkbox"/> Remove
BSO-SAD (SR Only)	<input type="checkbox"/> Add <input type="checkbox"/> Remove	Grants View Only	<input type="checkbox"/> Add <input type="checkbox"/> Remove
Agreements View Only	<input type="checkbox"/> Add <input type="checkbox"/> Remove	Research Portal Sponsored Salary Access	<input type="checkbox"/> Add <input type="checkbox"/> Remove

InfoEd Report Access

COGNOS: Report User (CAFÉ_IE_RESEACH_FACULTY)	<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 F2: OSR CENTRAL OFFICE ROLES

Model OSR Access after Existing User

Print Name:

NetID:

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|--------------------------|--------------------------|-----------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | OSR Award Setup | Run InfoEd to NUFinancials interface, review errors. Generate awards.
PG-GM-OSR_Award Setup |
| <input type="checkbox"/> | <input type="checkbox"/> | 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 |
| <input type="checkbox"/> | <input type="checkbox"/> | OSR Add Project | Add new projects and activities to existing contracts. PG-GM-OSR_AddProjAct |
| <input type="checkbox"/> | <input type="checkbox"/> | 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:

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|--------------------------|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 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	<input type="checkbox"/> Add <input type="checkbox"/> Remove	General	<input type="checkbox"/> Add <input type="checkbox"/> Remove	Planner	<input type="checkbox"/> Add <input type="checkbox"/> Remove	Grants	<input type="checkbox"/> Add <input type="checkbox"/> Remove
Commitments	<input type="checkbox"/> Add <input type="checkbox"/> Remove	Reports	<input type="checkbox"/> Add <input type="checkbox"/> Remove	Create Version 2	<input type="checkbox"/> Add <input type="checkbox"/> Remove	Create Version 3	<input type="checkbox"/> Add <input type="checkbox"/> Remove
Salary	<input type="checkbox"/> Add <input type="checkbox"/> Remove	Salary - Confidential	<input type="checkbox"/> Add <input type="checkbox"/> Remove				

NUPlans Budgeting Data Access

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

NUPlans Forecasting Roles

Prep File	<input type="checkbox"/> Add <input type="checkbox"/> Remove	Forecast	<input type="checkbox"/> Add <input type="checkbox"/> Remove	Grants	<input type="checkbox"/> Add <input type="checkbox"/> Remove	Tuition	<input type="checkbox"/> Add <input type="checkbox"/> Remove
Reports	<input type="checkbox"/> Add <input type="checkbox"/> Remove	Salary	<input type="checkbox"/> Add <input type="checkbox"/> Remove	Commitments	<input type="checkbox"/> Add <input type="checkbox"/> Remove		

NUPlans Forecasting Data Access

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

ESAF Systems Central Security Access Form

SECTION I: PROCUREMENT CENTRAL OFFICE ACCESS

Model Procurement Access after Existing User
Print Name: _____ **NetID:** _____

A D D	D E L		
<input type="checkbox"/>	<input type="checkbox"/>	PRS Approver	Approve blanket order requisitions and requisitions \$25,000 and over.
<input type="checkbox"/>	<input type="checkbox"/>	Central	Add purchase orders on-line, Generate and dispatch purchase orders via batch. Process change orders. PG-PV-Central
<input type="checkbox"/>	<input type="checkbox"/>	Inquiry Pro	Purchasing orders status inquiry. PG-PV-Inquiry Pro
<input type="checkbox"/>	<input type="checkbox"/>	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
<input type="checkbox"/>	<input type="checkbox"/>	PRS Admin	Add/update ship to, location, and category configuration. PG-PV-PRS Admin
<input type="checkbox"/>	<input type="checkbox"/>	POC Analyst	Review and process PO Change Order requests submitted by requesters. PG-PV-POC Analyst

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

<input type="checkbox"/>	<input type="checkbox"/>	Supply Chain	Access to delivered reports in this folder. CEN_SUPPLY_CHAIN
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SECTION I2: SCI-QUEST ADMINISTRATION ACCESS

<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

SECTION J: SUPPLIER CONTRACT MANAGEMENT ACCESS

Model Procurement Access after Existing User
Print Name: _____ **NetID:** _____

A D D	D E L		
<input type="checkbox"/>	<input type="checkbox"/>	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
<input type="checkbox"/>	<input type="checkbox"/>	Contract Agreements	Allows a Contract Administrator to update contract agreements such as service level or internal agreements. PG-CS-Contract Agreements
<input type="checkbox"/>	<input type="checkbox"/>	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
<input type="checkbox"/>	<input type="checkbox"/>	Contract Inquiry	Allows a user to view delivered Supplier Contract reports and queries. PG-CS-Inquiry
<input type="checkbox"/>	<input type="checkbox"/>	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
<input type="checkbox"/>	<input type="checkbox"/>	Clause Approver - PPS	Allows a Central PPS Clause Approver to approve new or updated clauses developed for contract templates. PS-CS-Clause-APP-PPS
<input type="checkbox"/>	<input type="checkbox"/>	Clause Approver - OGC	Allows an OGC Clause Approver to approve new or updated clauses developed for contract templates. PS-CS-Clause-APP-OGC
<input type="checkbox"/>	<input type="checkbox"/>	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
<input type="checkbox"/>	<input type="checkbox"/>	Clause Approver - IT	Allows an IT Clause Approver to approve new or updated clauses developed for contract templates. PS-CS-Clause-APP-IT
<input type="checkbox"/>	<input type="checkbox"/>	Clause Approver - DATA	Allows an IT Clause Approver to approve new or updated clauses related to ISSC/Data Security. PS-CS-Clause-APP-DATA
<input type="checkbox"/>	<input type="checkbox"/>	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
<input type="checkbox"/>	<input type="checkbox"/>	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
<input type="checkbox"/>	<input type="checkbox"/>	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:
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A D D	D E L		
<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"/>	Budget Office Analyst	Commitment Control inquiry. Budget journal entry, approval and posting. General Ledger inquiry. NUFinancials General Ledger reports. PG-GL-Budget Office Analyst
<input type="checkbox"/>	<input type="checkbox"/>	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
<input type="checkbox"/>	<input type="checkbox"/>	Budget Journal Deletion	Delete budget journals. PG-GL-Budget Journal Deletion
<input type="checkbox"/>	<input type="checkbox"/>	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

A D D	D E L		
COGNOS Reporting, Generate and View reports in central folders indicated below			
<input type="checkbox"/>	<input type="checkbox"/>	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:
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A D D	D E L		
<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"/>	Accounting Rep subk	Update award profiles. PG-GM-ASRSP Acctng Rep_subk
<input type="checkbox"/>	<input type="checkbox"/>	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
<input type="checkbox"/>	<input type="checkbox"/>	ASRSP BI Adjuster	Credit and rebill invoices. PG-GM-ASRSP_BI Adjuster
<input type="checkbox"/>	<input type="checkbox"/>	ASRSP BI LOC	Process LOC draw amounts. PG-GM-ASRSP_BI - LOC
<input type="checkbox"/>	<input type="checkbox"/>	ASRSP Contract Activate	Activate contracts. PG-GM-ASRSP_Contract Activate
<input type="checkbox"/>	<input type="checkbox"/>	ASRSP AR Depositor	Enter deposits. PG-GM-ASRSP_AR Depositor
<input type="checkbox"/>	<input type="checkbox"/>	ASRSP AR Payment	Apply payments. PG-GM-ASRSP_AR Payment
<input type="checkbox"/>	<input type="checkbox"/>	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
<input type="checkbox"/>	<input type="checkbox"/>	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
<input type="checkbox"/>	<input type="checkbox"/>	Grants FA NU Rates	Update Institution F&A Rates. PG-GM-Grants_FA_NU Rates
<input type="checkbox"/>	<input type="checkbox"/>	Grants FA Offsets	Update F&A Offsets configuration. PG-GM-Grants_FA_Offsets
<input type="checkbox"/>	<input type="checkbox"/>	Accounting Services Invoicer	Enter and maintain AR information for non-grants receivables. Create AR entries, add/update customer data. PG-GM-Acctng_Srvcs_Invoicer
<input type="checkbox"/>	<input type="checkbox"/>	Accounting Services Reconciler	Update banking information, AR maintenance, collection, and conversation pages. PG-GM-Acctng_Srvcs_Reconciler
<input type="checkbox"/>	<input type="checkbox"/>	Post Reporter	Run post award reports (SF272, SF269, F&A error report, and award budget inquiry). PG-GM-Post_Reporter
<input type="checkbox"/>	<input type="checkbox"/>	Cash AR Reporter	Run aging reports and general AR reports by customer. PG-GM-Cash_AR_Reporter
<input type="checkbox"/>	<input type="checkbox"/>	Sponsor Profile Maintenance	Update sponsor profile. Review InfoEd to NUFinancials sponsor interface errors. PG-GM-Sponsor Profile Maint
<input type="checkbox"/>	<input type="checkbox"/>	Grants Project Team	Add or delete Team Members (PI, Co-PI, RADM, etc.) to the Project Team. PG-GM-Grants Project Team
<input type="checkbox"/>	<input type="checkbox"/>	Project Costing View Only	View Project ID information in Project Costing, including detailed descriptions. PG-GM-Project Cost View Only

A D D	D E L		
COGNOS Reporting, Generate and View reports in central folders indicated below			
<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

ESAF Systems Central Security Access Form

SECTION M: 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"/>	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
<input type="checkbox"/>	<input type="checkbox"/>	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
<input type="checkbox"/>	<input type="checkbox"/>	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
<input type="checkbox"/>	<input type="checkbox"/>	AP Supervisor	AP Supervisor. Process express checks, control groups, voucher build, voucher post, budget check, matching, payment post, paycycle. PG-AP-Supervisor
<input type="checkbox"/>	<input type="checkbox"/>	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
<input type="checkbox"/>	<input type="checkbox"/>	AP Inquiry	View voucher data, basic vendor data, payment history. PG-AP-Inquiry
<input type="checkbox"/>	<input type="checkbox"/>	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
<input type="checkbox"/>	<input type="checkbox"/>	Accounting Services Voucher Approval	Voucher approval. PG-AP-Accnt-Srvcs-Apprv
<input type="checkbox"/>	<input type="checkbox"/>	Vendor Maintenance	Add/update vendors. Full access to vendor data. PG-AP-VndrMaint
<input type="checkbox"/>	<input type="checkbox"/>	Vendor Review and Validate	Review, validate and change status on saved and submitted Vendor Requests using the eCustoms database. PG-AP-Vendor-Validate
<input type="checkbox"/>	<input type="checkbox"/>	1099	1099 processing. PG-AP-1099
<input type="checkbox"/>	<input type="checkbox"/>	Match Exception	PRS/Interface Review. View only access to AP match errors. PG-AP-Match-Exception
<input type="checkbox"/>	<input type="checkbox"/>	Interface Review	SES/Voyager interface owners, voucher view. PG-AP-Interface-Review
<input type="checkbox"/>	<input type="checkbox"/>	Receipt Accrual	Review and run receipt accrual, PO budget year end processing. PG-AP-Rcpt-Accrual

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

<input type="checkbox"/>	<input type="checkbox"/>	Vendor Maintenance	Access to delivered reports in this folder.
<input type="checkbox"/>	<input type="checkbox"/>	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:

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<input type="checkbox"/>	<input type="checkbox"/>	Payment Request Update	View and modify Payment Requests entered by other users. *Assigned to Central AP Approvers. PG-AP-Pymnt-Request-Update-All
<input type="checkbox"/>	<input type="checkbox"/>	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
<input type="checkbox"/>	<input type="checkbox"/>	PPS Admin Buyer Approver	Display Only access to review the Add/Update PO pages and to apply approval. PG-PV-PPS-Admin Buyer Approver

ESAF Systems Central Security Access Form

SECTION O: GENERAL LEDGER CENTRAL OFFICE ROLES

Model General Ledger Access after Existing User

Print Name: _____ **NetID:** _____

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<input type="checkbox"/>	<input type="checkbox"/>	Accounting Srv NUJrnl Approver	Approve journals created via the actuals journal portal. PG-GL-Acct Srv NUJrnl Approver
<input type="checkbox"/>	<input type="checkbox"/>	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
<input type="checkbox"/>	<input type="checkbox"/>	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-Acctng Srvcs Jrnl Review
<input type="checkbox"/>	<input type="checkbox"/>	Mark Journals to Post	Mark Journals to post. PG-GL-Mark Journals to Post
<input type="checkbox"/>	<input type="checkbox"/>	Accounting Srv Jrnl Post	Post journals. PG-GL-Acctng Srvcs Jrnl Post
<input type="checkbox"/>	<input type="checkbox"/>	Accounting Srv Reports	General Ledger reports, Commitment Control and General Ledger inquiry. Ability to execute Nvision reports. PG-GL-Acctng Srvcs Reports
<input type="checkbox"/>	<input type="checkbox"/>	Accounting Srv Config	Allocations, bank account, year end close, ledger, journal, setup pages. PG-GL-Acctng Srvcs Config
<input type="checkbox"/>	<input type="checkbox"/>	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
<input type="checkbox"/>	<input type="checkbox"/>	Accounting Srv Jrnl Delete	Accounting Services Manager, receive notifications for journal delete requests. PG-GL-Acctng Srvcs Jrnl Delet
<input type="checkbox"/>	<input type="checkbox"/>	Accounting Srv CF Maintenance	Has ability to add and update chart field values. PG-GL-Acctng Srvcs CF Maint
<input type="checkbox"/>	<input type="checkbox"/>	Accounting Srv Tree Maintenance	Add, update trees. PG-GL-Acctng Srvcs Tree Maint
<input type="checkbox"/>	<input type="checkbox"/>	Inquiry with Attribute	PG-GL-KK Inquiry access with the following additional access: Budget attributes inquiry. PG-GL-KK Inquiry with Attribut
<input type="checkbox"/>	<input type="checkbox"/>	Bursar's Office CRT Access	Enter, review, and post CRT entries. PG-GL-Bursars Office CRT Access
<input type="checkbox"/>	<input type="checkbox"/>	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
<input type="checkbox"/>	<input type="checkbox"/>	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
<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"/>	Accounting Srv Jrnl Susp	Correct suspended Journals. PG-GL-Acctng Srvcs Jrnl Susp
<input type="checkbox"/>	<input type="checkbox"/>	AM Transaction Process	Create and process Asset physical and financial information. PG-NU-AM Transaction Process

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
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SECTION P: 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"/>	Bank Reconciliation Mgr	Bank reconciliation setup and processing. PG-GL-Bank Reconciliation Mgr
<input type="checkbox"/>	<input type="checkbox"/>	Bank Reconciliation Review	Bank reconciliation inquiry pages. PG-GL-Bank Reconciliation Review
<input type="checkbox"/>	<input type="checkbox"/>	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.

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

ESAF Systems Central Security Access Form

Query Scheduler Schedule NUFInancials queries. QY-NU-Query Scheduler

SECTION R: TREASURY ACCESS

Model Payables/Travel & Expense Access after Existing User

Print Name:

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<input type="checkbox"/>	<input type="checkbox"/>	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
<input type="checkbox"/>	<input type="checkbox"/>	Treasury Transfer Template Approver	Approve transfer templates in cash management. PG-GL-TR-Trns-Temp-Approver
<input type="checkbox"/>	<input type="checkbox"/>	Treasury Transfer Create	Requests EFT and bank account transfers in cash management. PG-GL-TR-Trns-Create
<input type="checkbox"/>	<input type="checkbox"/>	Treasury Transfer Approver	Approve transfer requests in cash management. PG-GL-TR-Trns-Approver
<input type="checkbox"/>	<input type="checkbox"/>	Treasury Accounting Entry	Modify accounting entries created from accounting templates in cash management. PG-GL-TR-Accntg-Entry
<input type="checkbox"/>	<input type="checkbox"/>	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		<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, 633 Clark, 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, 633 Clark, EV Campus	
	Print Name:	
	NetID:	
	Email:	
	Signature:	Date:

ESAF 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:

I-J: Procurement Central Office Roles		<input type="checkbox"/> Access Requested
PPS 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:

K: Budget Office Central Office		<input type="checkbox"/> Access Requested
Budget Office 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:

M-R: 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, 555 Clark, EV Campus	
	Print Name:	
	NetID:	
	Email:	
	Signature:	Date:

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