

Administrative Systems - NUFinancials Express Access Form

Applicant Information		<input type="checkbox"/> New User <input type="checkbox"/> Modification <input type="checkbox"/> School or Department Transfer <input type="checkbox"/> Inactivation	
*Date		*NetID	
*Name (Last, First MI)		*EMPLID	
*Department		*Work Email	
Title		Work Phone	

* indicates required field

OPTIONAL: Model all existing user's access: Name: _____ NetID: _____

NUFinancials – Type of 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 below
 - 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 2.
- ☐ **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 2
- ☐ **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.

Workflow Approval Access – for Expense Report, Journal, Payment Request and Requisition transactions

(Optional) Model Workflow access after existing user: **Name:** _____ **NetID:** _____

Check level of approval and specify the Department Tree Node, Department ID or Project ID (add a separate list if needed)

☐ Level 1 (\$0-\$1,499)
 ☐ Level 2 (\$1,499-\$4,999)
 ☐ Level 3 (\$5,000 and up)
 ☐ Budget Journal
 ☐ Project Pre-Approval
 ☐ ChartField Request

Add	Remove	Tree Node	DeptID	Project ID

Special Instructions: _____

* REQUIRED SIGNATURES

By submitting this request, the applicant and approvers 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. Policies are available for review at: <http://www.it.northwestern.edu/policies>.

Applicant Signature: _____ **Date:** _____

Department Head Name (print): _____ **NetID:** _____

Department Head Signature: _____ **Date:** _____

Dean's Office Name (print): _____ **NetID:** _____

Dean's Office Signature: _____ **Date:** _____

Email to: foitsecurity@northwestern.edu

Applicant Information

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*Name (Last, First MI)	*NetID
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List the NUFinancials chart string value(s) for ChartField Security Access (Row Level Security) – **specify the Department Tree Node, Department ID or Project ID on each line** (add a separate list if needed):

ChartField Security Access (Row Level Security) – specify the Department Tree Node, Department ID or Project ID on each line

- Access indicates the financial data you will be able to view online and in Business Intelligence system (Cognos) report catalogs
- General ledger, Budget ledger and Grants information in NUFinancials are limited by your ChartField Security Access
- Add a separate list if needed

(Optional) Model ChartField Security Access after existing user: **Name:** _____ **NetID:** _____

Add	Remove	Tree Node	DeptID	Project ID

Note: Keep a copy of this list of accounts for your reference. You will need to know which accounts you have access to when you begin using the system.

* Applicant Signature: _____	Date: _____
* Department Head Signature: _____	Date: _____
* Dean's Office Signature: _____	Date: _____

* indicates required field