

UNIVERSITY OF BALTIMORE - REQUEST FOR ACCESS TO PEOPLESFT FINANCIALS

Last Name	First Name	Title/Position	UB Phone	Depart./Office
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Login ID	UB Email	Building/Room #	Employee Type
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Type of Request (Do not use one form to make both Add and Delete Requests)

Check PeopleSoft Functionality to be added or deleted (based on prior selection)

- Department Budget Maintenance - BUD - transfer between budgets - complete Route Control
- Department Budget Inquiry - BUDINQ - view budget information only - complete Route Control
- Financial Report Distribution - Depts & Grants - FRDST - access nVision reports - complete Route Control
- Receiving - RECV - authority to mark Purchase Orders as received
- Requisition - REQ - create requisitions only - No Approval authority - complete Req Default, Procurement Supplemental Information, & Route Control
- Requisition - REQ25 - create and approval Authority of reqs up to \$25,000 - complete Req Default, Procurement Supplemental Information, & Route Control
- Requisition - REQ100 - create and approval Authority of reqs up to \$100,000 - complete Req Default, Procurement Supplemental Information, & Route Control
- Purchasing Card User - FN_PCARD_USER - (Note: Cardholder Info Form & Cardholder Agreement are required for purchasing card.*)
- Purchasing Card Reviewer - FN_PCARD_REVIEWER - (Note: Reviewer Agreement is required for purchasing card.*)
- AR Dunning - UB_AR_DUNNING - generate Dunning letters (Inform your departments Business Administrator and request training from them)
- Billing - UB_BILL_SPECIALIST - create invoices. Please list Billing Business Units:

(For Billing & AR Dunning, inform your department's Business Administrator and request training from them.)
- AR/Billing Query Access - UB_ARBI_QUERY_VIEWER - run Billing & AR queries
- Purchasing/Finance/OTS Staff Only:

My signature denotes the assumption of full responsibility for security of the information contained in all files as determined by the "Privacy Act 1974" (P.L. 94-247 as amended) and the State of Maryland Executive Order 01.01.1983 (article 27, Sections 45A and 146 of the Annotated Code of Maryland, as amended). My signature requesting access expressly consents to having my use of the system monitored and recorded by system personnel. If such monitoring reveals possible evidence of criminal activity, system personnel may provide the evidence of such monitoring and recording to the appropriate university and law enforcement officials.

Applicant Signature: _____ Date: _____

The Applicant's duties require access to this information. It is my responsibility to inform the Human Resources department of any changes in this employee's status which may affect access (e.g. termination of employment, leave of absence, change of job responsibilities or department).

Approved by: _____ Date: _____
Manager's Signature Printed Name

Training must be completed and access approved by the Procurement Office for procurement access, by the Budget Office for budget transfer and by the Comptroller's Office for financial reporting and AR/Billing before access is granted.

Comptroller's Office: _____ Date: _____
Printed Name

Procurement Director: _____ Date: _____
Printed Name

Budget Office: _____ Date: _____
Printed Name

Requisition Code Default & Supplemental Information

Dept #	Fund #	Program #	Grant/Project #
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Please list users who will be able to approve the applicant's requisitions:

Please list users for whom the applicant will have approval authority (if any):

*Cardholder Agreement, Cardholder Information, and Reviewer Agreement forms can be found at:
<http://www.ubalt.edu/about-ub/offices-and-services/procurement/purchasing-card-program.cfm>

Route Control - Enter Dept ID/Description and Project/Grant if applicable. Select desired access from each applicable dropdown. Obtain Manager signatures.

Dept #	Description	Project/Grant (if applicable)	Manager Signature	Budget	Procurement	Report Dist.
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Please send completed form to PeopleSoft Functional Systems Analyst in Administration and Finance.

Admin Only - Initial & Date:

Ticket #	PS Finance Approval	Copy to Fin Rptg	Security Admin Setup	Email to User
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