

Finance ConnectCarolina and Related Applications Access Request Form

Employee Information:			
Name:		Phone/email:	
PID #:		ONYEN:	
Home Dept. #:		Home Dept. Name:	
Manager Name/Title:		Manager Phone/email:	
ConnectCarolina Campus User Roles [select those needed]			
<input type="checkbox"/> Grant <input type="checkbox"/> Revoke	Budget Transfers* – Allows the user to enter, modify, and search for budget transfers. It also allows the user to delete budget transfers that have not been posted and resubmit budget transfers for approval after they have been denied.		
<input type="checkbox"/> Grant <input type="checkbox"/> Revoke	Budget Journals* – Allows the user to enter, modify and search for budget journals. It also allows the user to delete budget journals that haven't been posted and to resubmit budget journals for approval after they have been denied.		
<input type="checkbox"/> Grant <input type="checkbox"/> Revoke	Campus Vouchers* – Allows the user to create campus vouchers for reimbursements for employees and University affiliates, independent contractor payments, cash advances, and petty cash replenishments. It also allows the user to use the Voucher Inquiry option to search for and display voucher information.		
<input type="checkbox"/> Grant <input type="checkbox"/> Revoke	Creating and Changing Vendors* – Allows the user to request new vendors and independent contractors, and request changes to existing vendors and independent contractors.		
<input type="checkbox"/> Grant <input type="checkbox"/> Revoke	Journal Entries* – Allows the user to create campus journals, correct campus journals, correct journal entries, correct voucher journal entries, and inter-unit campus journals. It also allows the user to edit campus journals that have not been posted and to delete campus journals.		
<input type="checkbox"/> Grant <input type="checkbox"/> Revoke	Source Create** – Allows the user to request new fund sources or request changes to fund sources. [This job function is also included in the Journal Entries role so there is no need to request this role in addition to the Journal Entries role.]		
<input type="checkbox"/> Grant <input type="checkbox"/> Revoke	Managing Assets* – Allows the user to enter an asset's location, including searching for and viewing an asset, updating information, and reporting movement and status.		
<input type="checkbox"/> Grant <input type="checkbox"/> Revoke	Purchase Requisitions and Receiving* – Allows the user to create purchase requisitions and make changes to them before they are submitted. It allows the user to view the status of, cancel, print, and make copies of requisitions. It also allows the user to create a change order. This role also allows the user to record receipts, make changes to receipts, handle returns, and close receipts short.		
<input type="checkbox"/> Grant <input type="checkbox"/> Revoke	University Deposits* – Allows the user to process incoming payments at the department or school level, using direct journal deposits. Also allows the user to update and view deposits.		
<input type="checkbox"/> Grant <input type="checkbox"/> Revoke	Vendor Catalog** – Allows the user to place orders in the eProcurement vendor catalogs (such as Staples, Fisher Scientific). Also allows the user to view the status of the requisitions with which these orders are placed and to make changes to those requisitions.		
<input type="checkbox"/> Grant <input type="checkbox"/> Revoke	AR/Billing other than OSR* (only for units doing billing in ConnectCarolina) – This role is only for the small number of units who are doing billing in ConnectCarolina. Allows users to create and maintain customers and customer contacts, create online and internal bills, and adjust bills (including credits and rebills). Allows users to generate invoices with the single action invoice process. It also allows users to run inquiries to see outstanding invoices and information about customers.		
<input type="checkbox"/> Grant <input type="checkbox"/> Revoke	Inquiry Roles** – Gives users access to the accounts payable, purchase order, budgets and eProcurement inquiry options.		
<input type="checkbox"/> Grant <input type="checkbox"/> Revoke	Vendor Catalog View Only** – Allows the user to view items in the eProcurement vendor catalogs (such as Staples and Fisher Scientific) but not place orders from the catalogs.		
ConnectCarolina Central Office			
<input type="checkbox"/> Grant <input type="checkbox"/> Revoke	Connect Carolina Central Office user** – Please describe what access you need.		

Web Travel - Campus

Grant Revoke **Web Travel User**** - This role allows someone to access Web Travel and create Travel Documents. It also grants Approvers access to the application. Note: Anyone who has PeopleSoft Finance Administrative access, i.e. can access the PS Finance menu, is granted this role automatically and does not need to request it via this form.

Grant Revoke **Web Travel FRED Administrator**** - This role allows someone to set up workflow Approval Groups and Routes for departments.

Web Travel – Central Office Only

Grant Revoke **Web Travel Travel Agent**** - This role allows a Travel Agent from one of the approved Travel Agencies access to the Travel Agent functions.

Grant Revoke **Web Travel All Departments Reporting**** - This role grants access to the reporting feature that allows generation of reports against all departments

Grant Revoke **Web Travel All GA Departments Reporting**** - This role grants access to the reporting feature that allows generation of reports against all GA departments

Grant Revoke **Web Travel Travel Office**** – This role grants access to the Travel Office functions.

Grant Revoke **Web Travel Application Administrator**** - This role allows a user to configure the established Web Travel business rules.

Grant Revoke **Web Travel System Administrator**** - This role grants super user access to all Web Travel functions.

Purchasing Card (P-Card) - Campus

Grant Revoke **P-Card Card Holder**** - This role allows a P-Card holder to access the system and add line item detail to the transactions on his/her card.

Grant Revoke **P-Card Operator**** - This role allows a user to add line item detail to the transactions on all cards in the departments to which the user is authorized

List the departments for which Operator access is requested:

Grant Revoke **P-Card Reconciler**** - This role allows a user to add line item detail, enter the chartfields to be used, and approve transactions. Note: If someone is a Reconciler they do not need to be an Operator in those departments because they can do all the operator functions.

List the departments for which Reconciler access is requested:

Purchasing Card (P-Card) – Central Office Only

Grant Revoke **Card Internal Auditor**** - This role grants access to the Reporting functions for all P-Cards in the system.

Grant Revoke **P-Card System Administrator**** - This role grants super user access to all P-Card functions.

Surplus Property Management

Grant Revoke Administrator Manager User

Special Data Level Access Needed:**Business units:**

View Edit

View Edit

Department numbers:

View Edit

View Edit

Please provide justification for foundation business unit access requests. This access must be approved by the authorized contact responsible for the foundation.

* Training is required for this role.

** Training is not required for this role; training materials and courses are available.

Authorization signifies that employee has a business need for the requested access.

Dean/Department Head/HR Officer Name:

Title:

Signature:

Date:

For Access Request Coordinator Use Only:

Entered by:

Date Entered: