FINANCE

REQUEST FOR FINANCE SYSTEMS ACCESS

Central Office

Employee/User Information							
Last Name:		**First Name:**		**MI:**		**CB:**	
Onyen:		**PID:**		**Email:**			
Department Number:		**Department/School Name:**		**Position's Manager:**			
Position Number:		**Working Title:**		**Phone:**			

Action Requested Effective Date (Check only one.)

☐ **Add New User** *Effective date:*	**Modify Existing User:** ☐ Grant Access ☐ Revoke Access *Effective date:*

Access To UNCCH Business Unit and all unrestricted departments is granted automatically. Restricted Department Access (listed below) or Additional Business Unit or Foundation access requires justification in the area below. (System Office users are automatically granted access to UNCGA Business Unit and System Office Departments.)

Restricted Department Access Request (Check the restricted departments you require.)

☐ Athletics (270000-279900) ☐ Chancellor (200000-201398) ☐ Provost (500000-501002)	☐ Workforce Strategy Equity and Engagement (WSEE) (260000-269999) ☐ Budget Office (280100, 280200, 280300, 280400, 286000, 287000, 288000) ☐ System Office (UNCGA)

Justification for restricted department access, additional business unit access, or foundation access:

Section 1: ConnectCarolina Campus User

Section 1-A: Campus/Dept Finance (check all functions needed) Read ConnectCarolina Campus Finance Access Role descriptions.

☐ Budget Transfers*	☐ Budget Journals*	☐ BuyCarolina	☐ Campus Vouchers*
☐ Creating and Changing Suppliers*	☐ Inquiry Roles	☐ Journal Entries*	☐ Managing Assets*
☐ Purchase Requisitions and Receiving*	☐ Source Create	☐ University Deposits*	

** Training is required for these roles.* See the ConnectCarolina Finance Campus Access Roles page for training information.
Note: Roles with no required training have optional training available.

Section 1: ConnectCarolina LIMITED User Access (Requires Special Approval as noted below.)

Section 1-B: ConnectCarolina Enhanced Reporting (Special Access for campus users. MCU Leads determine who in their school or division needs to have enhanced reporting access. MCU Lead signature **required**.)

☐ Enhanced Reporting Access for Finance – Allows campus users to run queries in the RPT Reporting environment. MCU leads determine who needs to have enhanced reporting access. Staff members with this access can see information beyond their own department, so this group is kept small to keep information secure. Requires approval from the MCU lead (proxy signatures are not accepted).

Name of MCU Lead:		Title:
Signature of MCU Lead:		Date:

Section 1-C: ConnectCarolina Journal Import (Special Access for campus users. Requires pre-approval by Accounting Services.) Only valid for certain Journal Sources with Accounting Services approval.

☐ Journal Import Access – Allows user to import journals via flat file or Spreadsheet. This access requires approval of Accounting Services.

Section 2: ConnectCarolina –Central Office Staff

Section 2-A: Finance Central Office (check all functions needed) Read ConnectCarolina Central Office Finance Role descriptions.

☐ Central Office Chartfield Data Access	☐ Central Office Inquiry	☐ Central Office Reporting	☐ Central Office View Configuration	
☐ Internal Auditor				

☐ Other:

Note: Central office training is provided internally by each office. Self-paced online learning is available for many areas.

REQUEST FOR FINANCE SYSTEMS ACCESS

Central Office

Section 2-B: Viewing Sensitive Data (e.g. Social Security Numbers / Tax ID Numbers) The University restricts access to sensitive data. Only available for Central Office staff with a business need to view Sensitive Data.			
Name of employee's Director:		Title:	
Signature of employee's Director:		Date:	
Justification for Viewing Sensitive Data (required):			

Section 3: Travel-Related Access

SECTION 3-A: Travel and Expense Card (T&E Card)
Required:
- Attach a completed T&E Card Application and accountholder agreement form with every T&E Card request. Training must be complete prior to submitting a request and is linked on the Travel & Expense Card page.

☐ T&E Accountholder - Allows for processing of T&E Card Application.

SECTION 3-B: Concur Travel System User. (**Required:** Training on the Concur page.)
Note: User access is automatically created for employees and some affiliates and does not need to be requested. Information and instructions on how to assign delegates and approvers is on the Concur Travel Page.

Concur Travel System User Describe what access you need:	

SECTION 3-C: Web Travel – Campus (For Student and Guest Travel) Read Campus Web Travel role descriptions

☐ Web Travel User	☐ Web Travel FRED Administrator

See Finance's Travel Help page for Web Travel manuals, optional online training and more information.

SECTION 3-D: Web Travel – Central Office Only (For Student and Guest Travel) Read Central Office Web Travel role descriptions

☐ Web Travel Travel Agent	☐ Web Travel Travel Office
☐ Web Travel All Departments Reporting	☐ Web Travel Application Administrator
☐ Web Travel All GA Departments Reporting	☐ Web Travel System Administrator

Section 4: Purchasing Card (P-Card) Access

SECTION 4-A: Purchasing Card (P-Card) – Campus. Read Campus P-Card role descriptions.
Required: Attach a P-Card Application or WORKS Access Maintenance Form with every P-Card request.

☐ P-Card Account Holder*	☐ P-Card Group Approver*	☐ P-Card Group Proxy Reconciler*	☐ P-Card Group Scoped Auditor

* *Training* is required for these roles and must be completed prior to submitting a request. Training is linked on the Purchasing Card page.

SECTION 4-B: Purchasing Card (P-Card) – Central Office Read Central Office P-Card role descriptions.

☐ P-Card Internal Auditor	☐ P-Card System Administrator

Section 5: Surplus Property Management System (SPMS)

SECTION 5-A: Surplus Property Management System
Required: Attach the SPMS Registration with every SPMS request.

☐ Administrator	☐ Manager	☐ User	

Section 6: Customer Billing Management (CBM)

SECTION 6-A: Customer Billing Management (CBM) Read Campus CBM role descriptions.

☐ Modify Current Charges	☐ View Department Defaults	☐ Edit Department Defaults	
☐ Transaction File Status Journal Source:	☐ Reconciliation Journal Source:	List Department ID/ Ranges:	

Authorized signature required.

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

Role of Authorizer: (check one)	☐ Dean	☐ Department Head	☐ Manager/Delegate	☐ MCU Lead	☐ ARC
Name of Authorizer:		Date:			
Signature of Authorizer:					

Please submit this completed form to your Access Request Coordinator.