

Financial System Access Request Form Information

When requesting new or revised system access, the following form must be submitted. The following financial roles are based on job tasks and are to assist in determining the appropriate security access for Finance only. A sample of the financial section of the form is shown below for example only. The entire form can be accessed at <http://www.forms.calpoly.edu/ITSforms/secform.txt>

Select the appropriate Role(s) based on job needs

- Financial Inquiry Role – provides access to PeopleSoft Finance, BrioQuery Financial Tables (Datamarts) and nVision Reporting. Allows user to track financial data and access month end reports.
- Purchasing Requestor Role – grants access to enter purchase requisitions in PeopleSoft, but does not provide approval authority. It is important to indicate the name or names of the Approver that will be authorized to approve these requisitions. Additionally, the primary Department Id which will be linked to the requestor must be listed here.
- Purchasing Requisition Approval Role –gives the necessary access for approving purchase requisitions. Please list names of all Requestors you have the authority to approve.

(sample form)

PEOPLESOFT FINANCIALS:

Financial Inquiry Role

Purchasing Requestor Role

Specify Purchase Requisition Approver(s) _____
Specify the appropriate default DeptID _____

Purchasing Requisition Approval Role

Specify names of requestors that this approver will approve for

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Follow the remaining instructions on the form for successful submission. Upon completion of account setup, separate email notifications will be sent including Citrix password and the nVision password. PeopleSoft Finance is access through the Cal Poly Portal. For questions with the Financial portion of the form, please contact Laurie Borello lborello@calpoly.edu.