

**OSU Financials and eApplications Access Request Form**

**Access to this system is contingent upon successful completion of the Institutional Data Policy and any other required training for the access requested below.**

 **(For Institutional Data Policy Training Info go to :** [**http://buckeyesecure.osu.edu/Policy/InstitutionalDataTraining**](http://buckeyesecure.osu.edu/Policy/InstitutionalDataTraining)**)**

**Please Submit completed request form to** **access@osu.edu****.**

**AUTHORIZED SECURITY CONTACT:** (See [Access Contact List](https://dcmshib.osu.edu/content/groups/authenticated/%40.group.data_security%24/documents/contact_info/administrative_system_contacts.pdf))

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| --- | --- | --- |
| **\*Name:** | **OSU Phone #:** | **OSU Email Address:** |
|  |  |  |

\*Note: If the person who ‘submits’ the request is not an authorized contact, the form will be

    forwarded to the valid contact for approval before it is processed.

**II. ACCESS REQUESTED FOR:**

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| --- | --- | --- |
| **\*Name:** | **OSU Phone #** | **Emplid** |
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| --- | --- | --- |
| **Dept #** | **OSU Name.#:** | **OSU Email Address:** |
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**III. REQUEST TYPE: (**Select type of request by Checking the appropriate box.)

** New Request**

**Note:** If adding a new user, can another current user be deleted from the system?

        Please indicate below as a "Delete Request".

|  |  |
| --- | --- |
| **User Id** | **Date to be removed** |
|  | Click to Select Date |

** Delete Request**

** Model Request**

|  |  |
| --- | --- |
| **Model User’s Id** | **Model User’s Id** |
|  |  |

 Model User Account After:

 Note: Use of this option requires that you verify the Model user's access, and confirm that

        the new user will need **all** of the Model User's access.

**** I have verified that the model user's access is appropriate for this user.

** Change Request** (Specify in "Special Instruction" below what access to add or remove.)

**IV. Special Instructions:**

**V. USER MODULE ACCESS REQUESTED:**

**PROCUREMENT**

Requisitioner                              Delegated Buyer\*

Receiver Senior Delegated Buyer\*

PCARD Reconciler

PCARD 2ND Approver

Equipment Coordinator

PREP Initiator

Invoice Approver

PO & Req. Approver

eReports Only

**\*Note:** Training requirements and a signed M.O.U. are associated with the Delegated Buyer Roles

**GENERAL LEDGER**

****Deposit

Journal

Transfer

Plan Budget

General Funds PREP

Earnings PREP

Earnings Maintenance

GL Inquiry

GL Tree Read

**Indicate Required Departments**

**DNodes/Organizations:**

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Please enter any additional Dnodes or Orgs, as well as any additional information here!!

**Financials Workflow**

**Enter Workflow Role:** **Requisitions**

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| **DNODE/ORG** | **Req. 0K** | **Req. 5K** | **Req. 25K** | **Req. All** | **Gatekeeper** |
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**Note:  Enter X or WF in respective Workflow Role(s).**

**Initiator receives 0K role only.**

**Enter Workflow Role:** **Purchase Orders**

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| **DNODE/ORG** | **PO 0K** | **PO 1K** | **PO 5K** | **PO 25K** |
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**Note:  Enter X or WF in respective Workflow Role(s).**

**Initiator receives 0K role only**

**Enter Workflow Role:** **Invoice Approval**

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| **DNODE/ORG** | **Voucher** | **Blanket** | **Payment Request** |
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**Note:  Enter X or WF in respective Workflow Role(s).**

**Enter Workflow Role:** **General Ledger**

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| **DNODE/ORG** | **Journal Initiator** | **Journal Approver 1** | **Journal Approver 2** |
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**Note:  Enter X or WF in respective Workflow Role(s).**

**Enter Workflow Role:** **Budget**

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| **DNODE/ORG** | **Transfer Initiator** | **Transfer Approver 1** | **Transfer Approver 2** |
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**Note:  Enter X or WF in respective Workflow Role(s).**

**User Defaults:**

**Ship To:**

**Location:**

**eRequest Access:**

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| **DNODE/ORG** | **FR Purchase Requestor** | **FR Purchase Appr First** | **FR Purchase Appr Second** | **FR Service Center User** | **FR Pcard Mgr** |
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**Note:  Enter Node/Org with an X in Appropriate Role(s).**

** FR\_Internal\_Order\_Vendor**

** FR\_Purchase\_Inquiry\_All**

** FR\_ADHOC\_APPROVAL**

**For more information about eRequest go to the Assist pages at:**

[**https://assist-erp.osu.edu/assisterequest/**](https://assist-erp.osu.edu/assisterequest/)

**Comments:**

|  |
| --- |
| **Travel** |
| **User Roles**(Choose one or more roles below as appropriate)       |
|  |

 **(Enter D Node/Orgs and Choose one or more roles by putting a X in the box below the correct role(s))**

**\*Note:** Travel Initiator and Approver roles require training

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| --- | --- | --- | --- | --- |
| **DNODE/ORG** | ****TR Travel Arranger\***** | ****TR Travel First Approver\***** | ****TR Travel Second Approver\***** | ****TR Travel Request Inquiry**** |
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| **DNODE/ORG** | ****TR Payment Requestor\***** | ****TR Payment First Approver\***** | ****TR Payment Second Approver\***** | ****TR Travel Payment Inquiry**** |
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**Comments:**

**Central User Roles:**

TR\_Travel\_Admin

TR\_Travel\_OSURF\_Central\_Appr

**VII. DATA SECURITY COMPLIANCE:**

**By submitting this request form you are acknowledging that said User requires the specified access in accordance with their job functions. This user will be asked to comply with all OSU, Federal, State, and Local rules and regulations that are applicable to the data and must sign and return a compliance form as confirmation that they are aware of their responsibilities.**