

California State University, Long Beach Finance Authority Application



Applicant Information

Name: _____		Campus ID #: _____
Last Name	First Name	(EmplID)
Job Title: _____		Email: _____
Dept ID & Name _____		Phone: _____

Check the box(es) that apply for the access you need. Send the completed original to: FMIS Security Administrator, Brotman Hall 155. A fully completed form must be received prior to attending training. For help in completing the form, send an email to fishelpdesk@csulb.edu.

NOTE: Please refer to the web (http://www.csulb.edu/divisions/af/cms/end_user/FIS/forms/index.html) for the latest instructions on completing this form.

- NEW ACCESS** (check this option if establishing access for the first time)
- CHANGE ACCESS** (check this option to change access – include all access required, as if 're-requesting' access)
- DELETE ACCESS** (check this option when an employee no longer works for CSULB or changes jobs)
- NAME CHANGE** (check this option when an employee changes his/her name) Prior Name _____

BUSINESS UNITS									
<input type="checkbox"/> LBCMP	<input type="checkbox"/> LBTRV	<input type="checkbox"/> LBSTU	<input type="checkbox"/> LBFRM	<input type="checkbox"/> LBGAP	<input type="checkbox"/> LBCSU	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SET-IDs									
<input type="checkbox"/> LBCMP	<input type="checkbox"/> LBTRV	<input type="checkbox"/> LBSTU	<input type="checkbox"/> LBFRM	<input type="checkbox"/> LBGAP	<input type="checkbox"/> LBCSU	<input type="checkbox"/> CSCSU	<input type="checkbox"/> CSGAP	<input type="checkbox"/> MODEL	<input type="checkbox"/>

NOTE: End-Users need only complete page 1 and obtain approval signatures on page 3. Financial Mgmt should skip to page 2.

GENERAL ACCESS			
ROLES		OPERATOR PREFERENCES	
<input type="checkbox"/>	LB_INQUIRY	Inquiry & Reports	(FIS02)
<input type="checkbox"/>	LB_GL_EXTERNAL_USER	Online Journal Entry	(FIS03)
<input type="checkbox"/>	LB_PO_DEPT_BUYER *	Departmental PO Entry	(FIS04)
<input type="checkbox"/>	LB_PO_DEPT_BUYER_I *	Departmental PO Entry	(FIS04)
<input type="checkbox"/>	LB_PO_DEPT_BUYER_P *	Departmental PO Entry	(FIS04)
<input type="checkbox"/>	LB_PO_REQ_ENTRY	Requisition Entry	(FIS05)
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

- * **LB_PO_DEPT_BUYER** cannot approve his/her own Purchase Orders
- * **LB_PO_DEPT_BUYER_I** can independently approve his/her own Purchase Orders (must have Form 700 on file).
- * **LB_PO_DEPT_BUYER_P** can approve his/her own Purchase Orders (must be authorized by manager who has Form 700 on file)

ONLINE Requisition Approvals	
People Who Can Approve My Requisitions	People Whose Requisitions I Can Approve

ONLINE Purchase Order Approvals	
People Who Can Approve My Purchase Orders	People Whose Purchase Orders I Can Approve

CS-Link Report Distribution							
Please specify the highest level of access needed **							
Division	College/Sub Div	Sub-Sub Div	DeptID	Program	Fund	Project	Special

** ie: selecting a division automatically includes all of its sub-divisions. Please submit an attachment to add more DeptID, Program, Fund, or Project.

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For Financial Management Use Only

BUDGET OFFICE

ROLES		OPERATOR PREFERENCES	
<input type="checkbox"/>	LB_BD_COORDINATOR	Budget Coordinator	Ledger Group
<input type="checkbox"/>	LB_BD_SPECIAL	Budget Specialist	Ledger
			Source
			<input type="checkbox"/> Change Date on Correction Journals
			<input type="checkbox"/> Change Journals from Journal Generator
			Non-Standard Journal Entry Template

Approval By Budget Director

Date:

GENERAL LEDGER

ROLES		OPERATOR PREFERENCES	
<input type="checkbox"/>	LB_GL_ACCOUNTANT	GL Accountant	Ledger Group
<input type="checkbox"/>	LB_GL_BANK_RECON	Bank Reconciliation	Ledger
<input type="checkbox"/>	LB_GL_CLOSE_LEDGERS	GL Month-End Close	Source
<input type="checkbox"/>	LB_GL_CONVERSION	GL Conversion	<input type="checkbox"/> Change Date on Correction Journals
<input type="checkbox"/>	LB_GL_GENERATE_JOURNALS	Generate Journals	<input type="checkbox"/> Change Journals from Journal Generator
<input type="checkbox"/>	LB_GL_INTERFACE	GL Interface	
<input type="checkbox"/>	LB_GL_MANAGER	GL Manager	
<input type="checkbox"/>	LB_GL_PROJECT_RPTS	GL Project Reports	
<input type="checkbox"/>	LB_GL_SAM_REPORT	SAM Reports	
<input type="checkbox"/>	LB_GL_TREASURY_ANALYST	Treasury Analyst	
<input type="checkbox"/>	LB_GL_UCES_RPTS	UCES Reports	
<input type="checkbox"/>	LB_GL_UPLOAD_CHARGEBACKS	Upload Chargeback Files	

Approval By General Accounting Manager

Date:

ACCOUNTS RECEIVABLE / BILLING ACCESS

ROLES		OPERATOR PREFERENCES	
<input type="checkbox"/>	LB_ARB_INQUIRY	AR/Billing Inquiry	
<input type="checkbox"/>	LB_ARB_SPECIAL	AR/Billing Specialist	
<input type="checkbox"/>	LB_ARB_MANAGER	AR/Billing Manager	
<input type="checkbox"/>	LB_ARB_PAYROLL_SERVICES	AR/Billing for Payroll Svcs	

Approval By General Accounting Manager

Date:

FINANCIAL REPORTING

ROLES		OPERATOR PREFERENCES	
<input type="checkbox"/>	LB_FR_CDIP	CDIP User	
<input type="checkbox"/>	LB_FR_CF_MAINT	Chartfield Maintenance	
<input type="checkbox"/>	LB_FR_CF_MAINT_PROJ	Define Project Chartfield Values	
<input type="checkbox"/>	LB_FR_CHARTFIELD_MAPPING	GL Chartfield Mapping	
<input type="checkbox"/>	LB_FR_COA	Chart of Accounts	
<input type="checkbox"/>	LB_FR_COA_HR	Chart of Accounts - HR	
<input type="checkbox"/>	LB_FR_CONTROLLER	University Controller	
<input type="checkbox"/>	LB_FR_FINANCIAL_REPORTING	Financial Reporting	
<input type="checkbox"/>	LB_FR_FIRMS	FIRMS User	
<input type="checkbox"/>	LB_FR_NVISION	Develop nVision Reports	
<input type="checkbox"/>	LB_FR_TREE_MANAGER	Tree Manager	

Approval By Financial Reporting Manager

Date:

California State University, Long Beach Finance Authority Application



For Financial Management Use Only

ACCOUNTS PAYABLE ACCESS		
ROLES		OPERATOR PREFERENCES
<input type="checkbox"/>	LB_AP_APPROVAL	AP Approval
<input type="checkbox"/>	LB_AP_BUSINESS_USER	AP Business User
<input type="checkbox"/>	LB_AP_BU_MGR	AP Business Unit Manager
<input type="checkbox"/>	LB_AP_CHECK	AP Check
<input type="checkbox"/>	LB_AP_INTERFACE	AP Interface
<input type="checkbox"/>	LB_AP_MANAGER	AP Manager
<input type="checkbox"/>	LB_AP_STUDENT	AP Student Assistant
<input type="checkbox"/>	LB_AP_STUDENT_GROUP	AP Student Group
<input type="checkbox"/>	LB_AP_STU_VCHR_ENTRY	AP Student Voucher Entry
<input type="checkbox"/>	LB_AP_STU_VNDR_ENTRY	AP Student Vendor Entry
<input type="checkbox"/>	LB_AP_TECH	AP Technician
<input type="checkbox"/>	LB_AP_TRAVEL	AP Travel
<input type="checkbox"/>	LB_AP_VNDR_CREATE	AP Vendor Creation
<input type="checkbox"/>	LB_AP_VNDR_INQUIRY	AP Vendor Inquiry
<input type="checkbox"/>		Default Origin
<input type="checkbox"/>		Vouchers in Groups Only
<input type="checkbox"/>		Post Vouchers
<input type="checkbox"/>		Manually Schedule Payments
<input type="checkbox"/>		Override Match
<input type="checkbox"/>		Record Payment
<input type="checkbox"/>		Allow Regular Voucher
<input type="checkbox"/>		Allow Journal Voucher
<input type="checkbox"/>		Allow Adjustment Voucher
<input type="checkbox"/>		Allow Template Voucher
<input type="checkbox"/>		Allow Reversal Voucher
<input type="checkbox"/>		Add Vendor
<input type="checkbox"/>		Approve Vendor
<input type="checkbox"/>		Inactivate Vendor

Approval By Accounts Payable Manager

Date:

PURCHASING ACCESS		
ROLES		OPERATOR PREFERENCES
<input type="checkbox"/>	LB_PO_ANALYST	Purchasing Analyst
<input type="checkbox"/>	LB_PO_BUYER	Purchasing Buyer
<input type="checkbox"/>	LB_PO_INTERFACE	PO External Interface
<input type="checkbox"/>	LB_PO_MANAGER	Purchasing Manager
<input type="checkbox"/>	LB_PO_RECEIVER	Purchasing Receiver
		Location
		Ship To Location
<input type="checkbox"/>		Approve PO
<input type="checkbox"/>		Cancel PO
<input type="checkbox"/>		Work Approved PO
<input type="checkbox"/>		Full Auth for All Buyers
<input type="checkbox"/>		Approve Requisition
<input type="checkbox"/>		Cancel Requisition
<input type="checkbox"/>		Work Approved Requisition
<input type="checkbox"/>		Full Auth for All Requesters
<input type="checkbox"/>		Override Preferred Vendor
<input type="checkbox"/>		Approve Contracts
<input type="checkbox"/>		Enter Contracts
<input type="checkbox"/>		Hold Contracts
<input type="checkbox"/>		Close Contracts
<input type="checkbox"/>		Approve RFQ
<input type="checkbox"/>		Enter RFQ
<input type="checkbox"/>		Hold RFQ
<input type="checkbox"/>		Close RFQ

Approval By Purchasing Manager

Date:

SPECIAL ACCESS		
<input type="checkbox"/>	LB_QUERY_MANAGER	Create New Queries
<input type="checkbox"/>	LB_QUERY_MANAGER_2_TIER	Create Queries in 2-tier mode
<input type="checkbox"/>	ReportSuperUser	Delete Own Reports
<input type="checkbox"/>	ReportDistAdmin	Report Distribution Admin
<input type="checkbox"/>	LB_DEVELOPER	Developer Read-Only Access
<input type="checkbox"/>	LB_SECURITY	Security Administrator
<input type="checkbox"/>	LB_DBA	Database Administrator
<input type="checkbox"/>	Portal Administrator	Portal Administrator

I have read & will comply with all provisions for security & protecting the confidentiality of financial data per CSULB and State Law requirements. An administrator's signature certifies my business need for the FIS system access requested. I have permission to attend training prior to being granted a system password.

Signature of Person Requesting Access	Date	Division Approval	Date
Department Approval	Date	Director FMIS	Date
ASM Approval	Date	Vice President, Administration & Finance	Date