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| **Harvard Financial Systems FAS Access Request Form** |

\*\*\*\*\* Please complete this form and return it in its original MS Word document format, not as a pdf file \*\*\*\*\*

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| **Requestor Name** (Dept Admin/Supervisor): |  | **Dept:** |  |
| **New User Name:** |  | **Huid:** |  |

**CLONE ACCESS**

this function can only be used for cloning a user’s entire access. if partial access is required, skip this section.

it is required to review and confirm the user’s access that you are copying. to see the user’s access that you are copying, run the “Central Financial Systems Roles” Ruffas report at [**https://ruffas.fas.harvard.edu**](https://ruffas.fas.harvard.edu)

**Name of user to copy:**  **HUID to copy:**

**Buy2Pay Supplier Request**

**Accounts Receivable** Org(s):

**FedEx** Org(s):

**PCard Access:**To add or Remove access,Contact Joshua Dunn at [dunn@fas.harvard.edu](mailto:%20dunn@fas.harvard.edu)

**HCOM**

ROPPA training certificate required ([**link**](https://trainingportal.harvard.edu/Saba/Web_spf/NA1PRD0068/app/shared;spf-url=common%2Fledetail%2Fcours000000000003094%3Freturnurl%3Dcommon%2Fsearchresults%2FIntroduction%20to%20ROPPA%2FALL%3FembeddedInTorque%3Dtrue)). Email the certificate along with this form.

Complete Shopper or Approver.

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| **Shopper (If Shopper, do not fill out Approver section)**  Provide next approver’s HUID:  Provide 33 digit default coding:  Should Shopper be able to do payment request? **Yes No**  **Approver (If Approver, do not fill out Shopper section)**  Provide next approver’s HUID:  Provide 33 digit default coding:  Provide Org(s) for approval:  Indicate approval dollar amount: **$ Choose an item.**  **GENERAL LEDGER -- Journal Processing** |  |

**Fill in 1 & 2:**

**1. Org(s)/Org Range:**

**2. Salary Restrictions**  (PICK ONE):

**Access to all salaries**

**-S**: **excludes salary and fringe object codes** 6001-6090, 6130-6290, 6340-6370

(includes only temp salaries 6100-6129, 6300-6323)

**-FE**: **excludes faculty and exempt object codes** 6001-6054, 6130-6179, 6230, 6250-6270, 6340- 6370 (includes only non-exempt staff and temp salaries)

**-F**: **excludes faculty salary & fringe object codes** 6001-6040, 6230, 6250, 6340-6370 (includes exempt and non-exempt staff and temp salaries)

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| **HART – Financial Reporting**   |  | | --- | | **HART Dashboards** \*\*\*HART online Tools training certificate required for all dashboards ([**Link**](https://trainingportal.harvard.edu/Saba/Web_spf/NA1PRD0068/app/shared;spf-url=common%2Fledetail%2Fcours000000000003072%3Freturnurl%3Dcommon%2Fsearchresults%2FOBI%20Tools%20Training%2FALL%3FembeddedInTorque%3Dtrue)). Email the certificate along with this form. \*\*\*  **Public Access Only – University Wide Access -** includes only CSMA, Chart of Accounts, User Security Look-up  **P2P (Procure to Pay)** ORG(s):       (ORG(s) Required For Access)  **Accounts Receivables – University Wide**  **Cash Management – University Wide Access** Dashboard – Unclaimed Wires  **Grants Management –** GMAS access required  Approval by Physical Resources required for CAPS access  **CAPS (Capital Reports) Tub(s):**       \*required  **FINANCE – CIP**  **HART Financial Dashboards**HART Financials (Instructor led) training is not required, but highly recommended ([**Link**](https://trainingportal.harvard.edu/Saba/Web_spf/NA1PRD0068/common/ledetail/cours000000000007701))   1. **Pick Content Role**   Fin-General and Fin-Detail Comp can be selected together  **Finance General** - Provides summary salary information. Includes the following dashboards:   * Budget and actual comp * Fund management * GL Account monitoring * Transaction Listing with Bal Fwd (Balances w/Summary Comp) * Transaction Listing (TL W/Summary Comp and lite)   **Finance – Detailed Compensation** - Provides detail salary information on the following dashboards:   * Transaction Listing with Bal Fwd (Balances All) * Transaction Listing (TL All) * Transaction Listing Lite (TL All)   **Finance Limited Compensation** - Provides detailed transaction information but suppresses sensitive compensation-related object codes. Balance Forwards info **not** included. Dashboards included:   * Budget and Actuals Comparison - Limited Comp * Transaction Listing (TL - W/Limited Comp)   **Travel and expense**  - ORG(s):       Provides detail info on **concur** transactions  *DAs only* **Finance – Journals General** ORG(s):  *DAs only* **Finance – Management** – Dashboards included :   * Balance Sheet * Trial Balance * Change in Net Assets * Budget by Major Fund Groups **Tub(s):**       ORG(s):  1. **Choose** ONE **OBI-Segment Role and specify value(s)**   Select one of the following and fill in ranges, single or multiple values  Tub  Org(s)  allows access cross orgs and cross schools  Org+Activity   Fund(s):  Org+Fund   Activity(s):  Org+Root   Root(s):  Fund+Root | |  | |  | |  | |

**GMAS**

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| Indicate the type of access (we strongly encourage org-based access only when possible). The D.A. can assign fund-based access immediately (**link**).  **1.  Org-based access**  Org(s):  **2. Please indicate which role the user needs:**  PER - Period Expense Report (observer)  Action Memo  Dept Admin - for UPAS and At-Risk accounts. includes PER and Action Memo roles  Lab Admin - same as Dept Admin, but does not allow Administrative team management |

**ECRT- Electronic Salary Certification**

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| Primary Effort Coordinator Org(s):  Grant Manager Org(s): |

**AP Adjustments** - **Fixed Assets**

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| Adjustments Requestor - can request and approve, but not self-approve  Adjustments Approver - can approve only |

**PI DASHBOARD**

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| Access to all faculty - tub/org or access to a particular faculty - tub/root or full account string:  **Tub-Org(s):** -  or  **Tub-Root(s):** -  OR  **Full Account string:** Tub-Org-Fund-Act-Sub-Root     .      .     .      .      .     . |

**HUBS – Budgeting System**

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| **\***1. **Org(s)/Mega Org(s):**  \***2.** **Select Role:**  **Planner** (read/write access) OR  **Viewer** (read only access)  \***3.** **Select Responsibility:**  **EmplCINA user** - Access to the Employee and CINA data and most object codes between 4000-9336  **CINA user** - Access to object codes in the 4000-9336 range at an aggregate level. Individual employee salary information is blocked.  **TFO user** - limited to non-Tub 370 FAS Affiliates.  EmplCINA user for entire tub as described above. Allows users to copy CINA or Employee snapshots of the budget to draft versions. |

**CONCUR** ROPPA training certificate required ([**link**](https://trainingportal.harvard.edu/Saba/Web_spf/NA1PRD0068/app/shared;spf-url=common%2Fledetail%2Fcours000000000003094%3Freturnurl%3Dcommon%2Fsearchresults%2FIntroduction%20to%20ROPPA%2FALL%3FembeddedInTorque%3Dtrue)). Email the certificate along with this form.

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| **Add New User (not currently in Concur)** \*\*Only to be used for individuals who are Harvard Employees in pay classes not currently fed into Concur\*\*  \* required User must have A Harvard email Address:  \* required Tub:  Org:  \* required User has a Corporate Card? Yes  No  \* required Reason For Adding: Choose an item.  End Date (default is one year from set-up date):  -------------------------------------------------------------------------------------------------------------------------------------------------  **Delegate Role** - **THIS role is managed by the reimbursee –** see process below to assign delegate   1. On the upper right hand corner of the screen, click **Profile**, then **Profile Settings** 2. Under Expense Settings, click **Expense Delegates** 3. Click **Add** to bring up a Search Box 4. Enter the name of your Delegate into the **Search Box** 5. Select your **Delegate** from the list of names 6. Click **Add** to confirm your selection 7. Next to your Delegate’s name, select which actions you would like the delegate to have access   -------------------------------------------------------------------------------------------------------------------------------------------------  ADD  REMOVE  **Expense Approver**   **COA Approver – final approver**  Only one COA approver per org  ADD  REMOVE  Tub:  Org:  Tub:  Org:  Tub:  Org:  Tub:  Org: |

**Web Voucher Inquiry -** BCD Travel Authorizations and Employee Advance Request only . ROPPA training certificate required ([**link**](https://trainingportal.harvard.edu/Saba/Web_spf/NA1PRD0068/app/shared;spf-url=common%2Fledetail%2Fcours000000000003094%3Freturnurl%3Dcommon%2Fsearchresults%2FIntroduction%20to%20ROPPA%2FALL%3FembeddedInTorque%3Dtrue)). Email the certificate along with this form.

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| **Please choose one option below required for BCD Travel and Employee advance access only:**  **Preparer**  OR  **Approver** If Approver, please provide Org(s)/Org Range: |

Comments: