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

Includes Ad Hoc Reporting, Accounts Receivable, Concur, eCRT, FEDEX, General Ledger, GMAS, HUBS, HART, PI Dashboard, and Buy2Pay. Please return this form in its original MS Word document format, not as a PDF file.

**Requestor Name** (Dept Admin/Supervisor):       **Dept:**

**Name:**       **HUID:**

**For Person of Interest (POI) Provide an End Date:**

[ ]  **Clone Access**\*\*\*NEW June 2021\*\*\* It is required to review and confirm the user’s access that you are copying and to attach the report(s) along with this request. To see the user’s access that you are copying, run the “Central and FAS Security Roles” in the FINReport app: [Security Roles Reports](https://finreport.fas.harvard.edu/)

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| [ ]  **Clone All**  – User’s access for ALL the systems on this form will be the same as the user you are copying. |
| [ ]  **Clone Partial/Add Access** – Add access (to a user’s current access) that is a copy of another user’s access, but only for the systems you have chosen in this form. Check off the systems you would like to clone.  |
| [ ]  **Clone Partial/Replace Access** – Replace access with another user’s access, but only for the systems you have chosen in this form. Check off the systems you would like to clone. |
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| **Name of user to copy:**       | **HUID to copy:**        |

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**[ ]**  **Accounts Receivable Org(s):**

[ ]  **FedEx Org(s):**

[ ]  **HRVD^IPRO^Inquiry**

**PCard Settlement:** To add or remove access, contact Joshua Dunn at dunn@fas.harvard.edu. For access to view PCard transactions in the GL, scroll down to the HART section.

**[ ]  GMAS**

Indicate the type of access. We strongly encourage org-based access only when possible). The D.A. can assign fund-based access immediately ([GMAS](https://huit.harvard.edu/apps/finance)).

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| \* **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. |

[ ]  **General Ledger** – Journal Processing

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| **Fill in 1 & 2:** |
|  **1.** Org(s)/Mega Org Range: |
|  **2.** Salary Restrictions (Pick One):  |
| [ ]  Access to all salaries includes GL-PCR access  |
|  This is the only option that will allow processing GL\_PCR salary journals (excludes 6010-52100 salaries). This new function is now part of a user’s GL access and it requires access to HART Transaction Listing with Finance Detail to have HU\_GL journal appear under the Oracle menu as “GL/Journals responsibility.”  |
| [ ]  **-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) |

[ ]  **General Ledger Role** (GL-PCR) forProcessing Senior Salaries

This is a Tub Level role and needs special approval from Fac Affairs and Finance

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| Provide justification why this employee needs access:       |
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| [ ]  GL FAS^FCOR^370 Role [ ]  HART access to root 52100 [ ]  Aurora access to Sr Faculty  |

[ ]  **B2P**

Both ROPPA and B2P training are required to obtain B2P shopper (external user only), Supplier Portal Requestor and/or Approver access.

For ROPPA Training click here: [ROPPA Training](https://trainingportal.harvard.edu/Saba/Web_spf/NA1PRD0068/app/shared;spf-url=common%2Fledetail%2Fcours000000000003094%3Freturnurl%3Dcommon%2Fsearchresults%2FIntroduction%20to%20ROPPA%2FALL%3FembeddedInTorque%3Dtrue)

For B2P Supplier Portal Training click here: [Buy-to-Pay: Supplier Portal Overview (University-Wide)](https://trainingportal.harvard.edu/Saba/Web_spf/NA1PRD0068/app/me/learningeventdetail/cours000000000018121?regId=regdw000000000892711&returnurl=common%2Fsearchresults%2Fb2p%2FALL)

For B2P Requestor and Approver Training click here: [B2P Training](https://b2p.procurement.harvard.edu/eprocurement-ap)

Email the completion certificates for ROPPA & B2P Trainings along with this form.

Click on link to view detailed descriptions of the roles: [Role Descriptions](file:///%5C%5Cfas-depts.ad.fas.harvard.edu%5Cadmin%5Cfas%20finance%5CAppSec%5CB2P%20%28new%20HCOM%29%5CePro%20Roles%20and%20Descriptions%20%28002%29.docx)

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| [ ]  Supplier Portal - maximum of 2 users per dept. For larger depts maximum of 4 users |
| [ ]  TCM - Total Contract Manager  |
| **[ ]** Shopper – For external users /contractors only  |
| **[ ]** Requestor  |
| **[ ]** Approver – Orgs required for Approver Role only |
| Provide Org(s) for approval:                               |
| Indicate approval level: $ **Choose an item.** |

[ ]  **PI Dashboard**

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| [ ]  Access to all faculty - **Tub/Org(s)** -  |
| [ ]  Access to a particular faculty – Choose either Tub/Root or account string. |
|  **Tub-Root(s):**      -       |
|  Or  |
|  **Account String:** Tub-Org-Fund-Act-Sub-Root     .      .      .      .     .       |

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[ ]  **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 |

[ ]  **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. |

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| [ ]  **HART** – Financial Reporting

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| **HART Dashboards**  |
| HART online Tools training certificate is required for all dashboards. Link here: [HART Tools Training](https://wiki.harvard.edu/confluence/display/HART/HART%2BTools%2BTraining). Email the certificate along with this form. |
| [ ]  Public Access Only – Univ Wide Access - Includes CSMA, COA, User Security Look-up |
| [ ]  Accounts Receivables – Univ Wide Access |
| [ ]  Cash Management **-** Univ Wide Access Dashboard – Unclaimed Wires |
| [ ]  P2P (Procure to Pay) **Org(s):**       |
| [ ]  Travel and expense **Org(s):**       Provides detailed info on Concur transactions |
| [ ]  PCard Dashboard **Org(s):**       Provides detailed info on PCard transactions - in the GL only |
| [ ]  DAs only Finance – Journals General **Org(s):**       |
| [ ]  DAs onlyFinance – Management **Tub(s):**       or **Org(s):**       Dashboards included: Balance Sheet, Trial Balance, Change in Net Assets, Budget by Major Fund Groups  |
| [ ]  Grants Management – GMAS access required  |
| [ ]  CAPS (Capital Reports)– **Tub(s):**       Approval by Physical Resources required for CAPS access |
| [ ]  Finance – CIP |
| **HART Financial Dashboards**  |
| HART Financials (instructor led) training is not required, but highly recommended. Link here: [HART Financial Dashboard Training](https://trainingportal.harvard.edu/Saba/Web_spf/NA1PRD0068/common/ledetail/cours000000000007701) |
| **Step 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)
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| * Transaction Listing (TL W/Summary Comp and lite)
 |
| [ ]  Finance – Detailed Compensation - Provides detailed salary info 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(Object codes included in view 6100-6129, 6131-6177, 6260-6269, 6300-6309) Balance forwards info not included. Dashboards include: |
| * Budget and Actuals Comparison - Limited Comp
 |
| * Transaction Listing (TL - W/Limited Comp)
 |
| **Step 2: Choose ONE** **HART segment role and specify value(s)**  |
|  Select one of the following and fill in ranges - single or multiple values: |
|  [ ]  Tub       Allows access across orgs and across schools |
|  [ ]  Org(s)       [ ]  Fund(s):       |
|  [ ]  Org + Activity       [ ]  Activity(s):        |
|  [ ]  Org + Fund       [ ]  Root(s):        |
|  [ ]  Org + Root        |
|  [ ]  Fund +Root        |

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**[ ]**  **Concur**

ROPPA training certificate required. Click here for [ROPPA training](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 completion 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. Pay classes that are automatically fed into Concur include: Exempt, Non-Exempt, Internal Post Docs, and Faculty (excluding Emeritus). |
|  \* 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
 |
| 1. Under Expense Settings, click Expense Delegates
 |
| 1. lick Add to bring up a Search Box
 |
| 1. Enter the name of your Delegate into the Search Box
 |
| 1. Select your Delegate from the list of names
 |
| 1. Click Add to confirm your selection
 |
| 1. Next to your Delegate’s name, select which actions you would like the delegate to have access
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| [ ]   **Expense Approver –** Add |
| [ ]   **Expense Approver –** Remove |
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| [ ]   **COA Approver** - There can only be one approver per Org. If you are adding a COA Approver to an Org that already has someone assigned as the COA Approver for that Org, you must send in two forms – one form to add the new approver and one to remove the current approver. |
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| [ ]   **Add** COA ApproverOnly one COA Approver Per Org  **Tub:**       **Org:**        **Tub:**       **Org:**        |  [ ]   **Remove** COA Approver Only one COA Approver Per Org  **Tub:**       **Org:**        **Tub:**       **Org:**        |

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**Comments:**