Potsdam
STATE UNIVERSITY OF NEW YORK

Financial Security
Access Request Form

Sections I and II to be filled out by employee's supervisor.
Questions and completed forms can be forwarded to the Campus Security Administrator-Primary, Phyllis Charleson, charlepc@potsdam.edu and Secondary-Ellen Mathews, mathewer@potsdam.edu.

I. Please provide information for employee(s) requiring access:

Employee Name: _____ **P#:** _____

Please list all names & P#'s if requesting same permissions for multiple people:
_____

II. Applications/Functions/Account(s) Requested: *Please check box(es) for access required*

Effective Date: _____ **Add** **Remove**

Business Intelligence (BI) **Other Applications (list below)**
State Financial System (SFS) **P-Card Permissions-Contact S. Cobb**
Finance & Management System (FMS) **OSC {Payserv}**

Copy Access of Existing User (If applicable):

Existing User's Name: _____ **Existing User's P#:** _____

Application or Permission Title / Description: _____

Individual Account(s): _____

Account Group(s): _____

Comments: _____

_____
Supervisor Name (printed)

_____
Supervisor Title

_____
Supervisor Signature

_____
Date

The supervisor's signature confirms that the user requires access to SUNY Administration's *computer system(s)/data to perform his/her job duties.* **It is also required that the supervisor submit this form in the event an employee separates, transfers out of the department or has a change in job duties.**

III. For Security Adminstrator Use Only

BI add via role: _____ BI add via group: _____
SFS User ID: _____ P-Card Acct Access: _____
FMS Workflow: _____ OSC User ID: _____

_____
Campus Security Administrator Signature
Primary - Phyllis Charleson
Secondary - Ellen Mathews

_____
Date

Financial Security Access Request Instructions

This form is used to request:
1. Web-based applications, such as Business Intelligence and others specified by the department
2. State Financial System (for limited users)
3. P-Cards (this is only one step of the process; please contact Susie Cobb in Purchasing for complete instructions)
4. Financial & Management System (FMS) applications
5. OSC (PayServ – only for Human Resource Services and Payroll Services employees)

Section I – Employee(s) Information:

Fill in the Name and P# for the employee requesting the access. If requesting for a department or group of people {all must be requesting the same access(es)}, please list all the names and P#'s in the specified area.

Section II – Application(s)/Function(s)/Account(s) Requested:

Enter the following:

1. Effective Date – the current date or future date for access needed at a later time. For example, a later date would be appropriate for a future new hire or an employee who is separating from the department or college at a later date.

2. Select one of the following:

   a. New – new access is being requested
   b. Remove – requesting the access be removed from the employee (group) due to change in assignment or separation from institution.

3. If you wish to copy an existing person's access(es)/permission(s), please provide the existing user's name and P#. If you have exceptions, please list the permissions to add or not assign in the comment section.

4. Application or Permission Title/Description – If you know the permission title being requested, please enter it here. If the specific title is not known, please describe the application and permission. A follow-up with the supervisor may be needed to ensure the proper permission is being granted.

5. Individual Account(s) – Identify the specific account(s) that the requester needs access. This is for access to Account Summary dashboards in Business Intelligence (BI). If requesting one account plus all the sub-accounts, please indicate as such here.

6. Account Group(s) – Please specify account groups by reporting level (name the department, division, etc.)

7. Comments – Please enter any special notes or instructions in this area. If requesting to copy an existing user's permissions with exceptions, please list the exceptions here.

8. Supervisor Name and Title – this should be the supervisor of the individual requesting the access/permission. If requesting a permission that is outside your area, the authority overseeing that area may be required to approve the request in addition to the immediate supervisor.

9. Supervisor Signature and date.

Section III – For Security Administrator Use Only

The security administrator will enter the following, based on the permission(s) being requested.

➢ BI add via role and group
➢ SFS User ID
➢ P-Card Account Access
➢ FMS application/workflow
➢ OSC User ID

Please forward questions and completed forms to Phyllis Charleson, Administrative Assistant II and Campus Security Administrator, at charlepc@potsdam.edu or Kelly Deshaies at deshaikl@potsdam.edu.

4/13/21; Rev 2; sll