

CUNYfirst Procurement User Access Request Form - PRODUCTION

Please Note: This is a required form to gain access to the PeopleSoft system, and must be requested by the employee's manager. No employee may request access for themselves. For transferring employees, a separate form must be completed from the Campus and/or Department transferring FROM and TO in order to modify access in both areas. This request must be made in advance of the Effective Date of the personnel action.
Security is granted by Business Unit.

EMPLOYEE INFORMATION SECTION:			
Last Name:		First Name:	
CUNYfirst Emp ID *:		Job Title:	
Business Unit / Campus:		Department Name:	
Work Phone:	Ext:	CUNY email address:	
CONFIDENTIALITY STATEMENT (Must be signed by the Employee):			
I understand that the data obtained from any CUNYfirst system is to be considered confidential and NOT to be shared with anyone who is not authorized to receive such data. I understand that I am individually accountable for the use of my User ID in the CUNYfirst system. Improper use of my User ID could lead to revocation of access rights and further disciplinary proceedings in accordance with CUNY policies, rules and regulations, and applicable collective bargaining agreements.			
Employee's Signature: _____		Date: _____	

Procurement Roles

Requester*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Creator**	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Requester's Supervisor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Department Approver – Level 1****	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Department Approver – Level 2****	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IT Category Approver	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Facilities Category Approver	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hazmat Category Approver	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Budget Reviewer***	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Buyer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PO Approver	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Receiver	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inspector	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AP Voucher Entry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AP Pend 3(Level1) Approver (Community Colleges)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AP Pend5(Level2) Approver (Community Colleges)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AP Approver (Senior Colleges)©	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contract Entry ^	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

*All Requesters must also specify their Supervisors (See Step#1 below)
 ** For Creator, specify the requestor for whom this individual is creating the requisition (See Step#2 below)
 **** For Department Approvers (See Step#3 below)
 ***If no Department Approver is found on a Requisition, then Budget Reviewer in the campuses will be notified via Worklist
 © AP Approvers for Senior Colleges must not check AP Voucher Entry and vice versa as per New York State Policy
 ^ Refer to Contract Processing section for details (See Page 4 of 5)

Additional Information for Specific Procurement Roles

1) For Requestor (To be verified by Supervisors/Department Heads). Work with your local Budget Office for assistance

Supervisor Employee Id	
Location (room or cubicle code)	
Ship To (Loading Dock room code at the campus)	
Requestor Phone	
Requestor Fax	
GL Business Unit	
Default Fund (10, 11, 20 or 61)	
Default Department	
Default Major Purpose (MP)	
Default Operating Unit (Oper Unit)	
Default Program (Fill 99999 if Not Applicable)	
Default Funding Source (Fnd Src) (Fill 999999 if Not Applicable)	
Default Special Initiative (Sp Init) (Fill 9999 if Not Applicable)	

2) For Creator (To be verified by Requestor's Supervisors/Department Heads)

3) For Department Approver (Level 1 and Level 2)

Only One Primary Permission List is required

Primary Permission List and Row Level Security is Required (Normal Handling)

<input type="checkbox"/>	CUFSDPAPxxx	(Procurement Only)
<input type="checkbox"/>	CUFSDPAPxxxSF	(Student Refunds Only)
<input type="checkbox"/>	CUFSDPAPxxxALL	(Procurement and Student Refunds Both)
<input type="checkbox"/>	Keep Existing	(already a GL user)

Primary Permission List and Row Level Security is Required (HTR/HCS Only)

<input type="checkbox"/>	CUFSDPAPHTR	(Procurement HTR Only)
<input type="checkbox"/>	CUFSDPAPHCS	(Procurement HCS Only)
<input type="checkbox"/>	CUFSDPAPHTRALL	(HTR and HCS Both)*

**Purchasing and Payables Employees for HCS and HTR are common*

Primary Permission List and Row Level Security is Required (GRD/HON/SOJ/SPS Only)

<input type="checkbox"/>	CUFSDPAPGRD	(Procurement for all GRD/HON/SOJ/SPS)*
<input type="checkbox"/>	CUFSDPAPSPS	(Procurement SPS Only)
<input type="checkbox"/>	CUFSDPAPSOJ	(Procurement SOJ Only)
<input type="checkbox"/>	CUFSDPAPHON	(Procurement HON Only)

**GRD does Purchasing for All GRD/HON/SOJ/SPS and GRD does Payments for GRD and HON Business Units*

Student Refunds (Colleges)

Student Refunds - Campus	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Student Refunds (Central Office - Only)

Student Refund - Central Office	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student Refund - Payment Update	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bank Reconciliation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

WorkStudy Payroll Taxes (Central Office - Only)

AP Voucher Entry		<input type="checkbox"/>		<input type="checkbox"/>
AP Pend 3(Level1) Approver		<input type="checkbox"/>		<input type="checkbox"/>
AP Pend5(Level2) Approver		<input type="checkbox"/>		<input type="checkbox"/>

Vendor Management (Central Office - Only)

Vendor Admin		<input type="checkbox"/>		<input type="checkbox"/>

Contract Processing

Contract Entry		<input type="checkbox"/>		<input type="checkbox"/>
Contract Approval (Central Office - Only)		<input type="checkbox"/>		<input type="checkbox"/>

Outside Legal Services Approver (Central Office - Only)

Legal Category Approver		<input type="checkbox"/>		<input type="checkbox"/>

NOTE:

Requesters, Receivers and Inspectors must obtain approval from campus Business Managers.

Requisition Approvers (Supervisors, Department Lev 1 and Lev 2) and Category Approvers must obtain approval from Vice President of Administration or his/her designee at the campus

Refer to the "Approvals and Special Consideration" section of the form for signatures

Approvals and Special Consideration

Last Name:		First Name:	
Date of Security Activation:	OR	Date of Security Deactivation:	

Business unit:		Department:	
Requesting Manager Last Name:		First Name:	
Requesting Manager Signature:		Date:	

*Central Office Controller/Deputy Last Name:		First Name:	
*Central Office Controller/Deputy Signature:		Date:	
Business Manager Last Name:		First Name:	
Business Manager Signature:		Date:	
VP of Administration Last Name:		First Name:	
VP of Administration Signature:		Date:	

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* for Central Office employees ONLY