INSTRUCTIONS FOR FILLING OUT THE FINANCIAL SYSTEMS ACCESS FORM

1. Check the box for the type of access required – New User, Modify User, Delete User

2. Enter the District information in the lines provided.

3. Enter the employee's full name and position.

4. Provide your name on the line labeled "Person Completing Form".

5. Provide a User Login name. This is typically the first letter of their first name and their entire last name. This cannot be more than fifteen characters.

   Ex. Robert Frost User Login Name: rfrost

   Some workplaces have employees with the same first initial and last name; it is recommended that you use their middle initial as well to differentiate between these individuals.

6. Select a user password; this can be up to fifteen characters. ***Do Not*** use Social Security numbers, birth dates, spouse's names, your user login name or other easily guessed passwords.

7. Obtain the approval of the Site Administrator. This should be the person whose name is on file with the IS&T department at FCOE as the authorized system coordinator.

8. Mail or fax this form, accompanied by the FINANCIAL SYSTEM MENU ACCESS pages to FCOE c/o Information Systems and Technology, Attention: Financial System Administrator or fax to: 497-3707.

NOTE: For new or modified users, this form must be accompanied by a completed Menu Access Form.

INSTRUCTIONS FOR FILLING OUT THE FINANCIAL SYSTEMS MENU ACCESS FORM

NOTE: Each page must be completely filled out. You should not leave any access line blank.

1. Write in the Employee's name and the name of the District at the top of each page.

   Each application may have up to three menu choices: RW – Read/Write, RO – Read Only, and NA – No Access.

   RW — This box should be checked to provide the employee the ability to input data. Applications such as Purchase Orders, Requisitions, and Payroll and Personnel entry require this type of access.

   RO — Read Only access allows users to obtain information from the application but not to affect the data. This would allow applications such as Personnel and Payroll to be queried by non-payroll and personnel technicians where applicable.

   Any reports for which access is to be provided should be marked with this access type.

   NA — Choose this access type to restrict the user from being able to perform these functions. Internal controls over the financial system recommend that certain types of functions be kept separate – for example, payroll technicians should not have access to personnel functions, and *vice versa*.

2. Fill out the form, making sure that for every line only one box is checked. (Do not check multiple boxes on the same line.)

3. Initial each page at the bottom, and sign and date the final page.

4. Send in every page of the form, even if no access is provided for that page.

5. Mail or fax these pages, accompanied by the FINANCIAL SYSTEM ACCESS form to FCOE c/o Information Systems and Technology, Attention: Financial System Administrator or fax to: 497-3707.