

System Access Form Instructions

The [System Access Form](#) should be used to establish access to financial applications for one user. This form can be used for any or all of the following applications: 1) Signature Authority, 2) Lawson Requisition Center, 3) BI Portal – Financial Reports.

* Indicates a required field

1	User Information*	<p>Provide the following information for the user:</p> <ul style="list-style-type: none"> • First Name & Last Name • Employee ID # • Department Name • Position/Title • Supervisor • UVID • Email
2	Access Levels or Accounting Units*	<p>List the highest Level or AU(s) that you will need access to for the financial applications selected on this form.</p> <ul style="list-style-type: none"> • Level 1 – Division (2 digits) • Level 2 - VP/School (3 digits) • Level 3 - Program/Area (3 digits) • Level 4 – Department (4 digits) • Accounting unit (6 digits)
3	AU Types	<p>For Level access, select the AU Types that the user will need to access. For a detailed list, please refer to the GL Structure definitions.</p>
4	Signature Authority	<p>Indicate whether the user is authorized to initiate or approve payment requests/make purchases/transfer expenses for the AUs or Levels listed on the form.</p>
5	Lawson Requisition Center	<p>If the user will be using the online application to create purchase requisitions in Lawson, please provide the following information:</p> <ol style="list-style-type: none"> 1. Select one type of access: <ul style="list-style-type: none"> • New – for new Lawson RQC Users • Additional Access – to add new levels or AUs to existing RQC access • Revised – to replace the current RQC user setup 2. Select one type of user: <ul style="list-style-type: none"> • If the user will be a Requester, provide the Approving Manager’s name* • If the user will be an Approver, provide a list of the existing Requesters the user will be approving. <p><i>Note: An Approver should have Signature Authority and be authorized to approve purchases for the AUs on their own profile as well as the AUs on the profiles of the requesters that they approve. Each Approver record should have a secondary Approver for purchases over \$5k to comply with the policy for Approving requests over \$5k.</i></p> <p>Note: a requester can only have one approver but a single approver can approve for many requesters.</p> <p>*If the approving manager does not have access to Lawson Requisition Center, a separate form will need to be submitted to setup their access</p>

6	BI Portal – Financial Reports	<p>If the user should be able to generate financial reports for Levels or Accounting Units, please provide the following information:</p> <ol style="list-style-type: none"> Select one type of access: <ul style="list-style-type: none"> New – for new WebFocus Users Additional Access – to add new levels or AUs to existing WebFocus access Revised – to replace the current WebFocus access Select the appropriate level of payroll access for the user. Access to payroll accounts allows users to view payroll detail by employee, date, and pay code (regular, sick, vacation hours, etc). <p>The following payroll options are available:</p> <table border="1" data-bbox="526 554 1503 993"> <thead> <tr> <th>Payroll Access</th> <th>Account Range</th> </tr> </thead> <tbody> <tr> <td>All Payroll</td> <td>Accounts 5000-5499</td> </tr> <tr> <td>No Payroll</td> <td>No payroll detail access</td> </tr> <tr> <td>Faculty Payroll</td> <td>Accounts 5000-5099, 5200-5299</td> </tr> <tr> <td>Staff/Student/Temp Payroll</td> <td>Accounts 5100-5199, 5300-5399, 5400-5499</td> </tr> <tr> <td>Student/Temp Payroll</td> <td>Accounts 5300-5399, 5400-5499</td> </tr> <tr> <td>Grant Payroll</td> <td>Accounts 5000-5499, where the Accounting Unit = 5xxxxx</td> </tr> </tbody> </table>	Payroll Access	Account Range	All Payroll	Accounts 5000-5499	No Payroll	No payroll detail access	Faculty Payroll	Accounts 5000-5099, 5200-5299	Staff/Student/Temp Payroll	Accounts 5100-5199, 5300-5399, 5400-5499	Student/Temp Payroll	Accounts 5300-5399, 5400-5499	Grant Payroll	Accounts 5000-5499, where the Accounting Unit = 5xxxxx
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7	Department Approval*	<p>List the name of the person who is authorized to approve the request. Requests for Signature Authority for Sponsored Program Accounting Units, must be personally endorsed by the Principal Investigator.</p>														
8	Submit form	<p>Click on the email button in the upper right corner to send the PDF file as an attachment to FinancialSystems@luc.edu. Grntcon@luc.edu should be included on any requests for Signature Authority on Sponsored Program Accounting Units.</p> <p><u>Please remember to copy the AU Approver on the request.</u></p> <p><i>Note: Scanned forms or forms printed to PDF will be returned to the sender for resubmission.</i></p>														