

COMMON FINANCIAL SYSTEM (CFS) & BUSINESS INTELLIGENCE (BI) ACCESS REQUEST FORM INSTRUCTIONS

Use this instruction request access for COMMON FINANCIAL SYSTEM (CFS) and/or BUSINESS INTELLIGENCE (BI). Complete ONE form for each employee/module.

If an employee is leaving and a new employee is hired, two forms must be completed. One form to remove all access for the employee leaving and another form for the new employee requesting new access to the specified module.

1. USER INFORMATION:

All fields are mandatory in this section.

2. EMPLOYEE STATUS:

Select the employee status.

3. SECURITY TRAINING STATUS:

"Data Security & Privacy" and "FERPA & Protecting Education" training needs to be completed. This can be found here: <http://tech.sfsu.edu/guides/skillport>. This will be filled out by the Account Access Administrator.

4. MODULES:

Select **ONE** of the following CFS modules for each employee:

1. **Create Requisitions**
2. **Approve Requisitions**
3. **AR billing – End user**

Or

Select **ONE** of the following BI modules for each employee:

1. **Payroll Access**
2. **Finance Reporting**

5. REQUEST DETAILS:

Specify details in the data grid.

Use the comments for any special instructions such as **ADD, REMOVE or UPDATE**, along with a brief description of the requested access within the selected module.

6. USER TO CLONE:

If applicable, provide the full name and ID number of another employee in the department that has the same access.

7. SIGNATURE/APPROVALS:

This form must be signed by the *Applicant's Supervisor* and *Departmental Approvers* after completion. Send the form to the appropriate contact listed at the bottom on the form.

8. TRAINING

The *Applicant's Supervisor / Department* is responsible for ensuring the completion of appropriate training for the requested roles.

9. QUESTIONS

If you have questions about the form or need clarification on the roles, please contact the security administrator

CERTIFICATION ACCEPTANCE:

By signing and submitting the approved request, you certify acceptance of the following conditions below:

I certify that I have read and understood the computing Ethics and Security document (located at <http://www.sfsu.edu/~helpdesk/docs/rules/ethics.htm>) and I agree to abide by the practices stated therein. I certify that the proposed use of CMS – Financial Management System and of other SFSU Fiscal Affairs Business Systems application/s is justified by the programs of the California State University system. Penal Code Section 502 states that it is a criminal offense to intentionally access, or cause to be accessed, any computer system or application for the purpose of:

1. Maliciously accessing, altering, deleting, damaging, or destroying any computer system/network, or
2. Devising or executing any scheme or artifice to defraud or extort, or
3. Obtaining money, property, or service with false or fraudulent intent, representation, or promise.

I certify that I have been oriented regarding the state and federal laws and University policies that govern access to and use of information contained in employee, applicant, and student records, including information/data that is accessible through oral, written, or electronic means including data that is accessible through the CMS-PeopleSoft Human Resource System and Financial Management Systems.

I understand that I am being granted access to this information/data based on my agreement to comply with the following terms and conditions:

- I will comply with state/federal laws and University policies that govern access to and use of information contained in employee, applicant, and student records, including information that is accessible through oral, written, or electronic means
- My right to access information is strictly limited to the specific information/data that is relevant and necessary for me to perform my job-related duties
- I am prohibited from accessing information that is not relevant and necessary for me to perform my job-related duties
- I will be a responsible user of information, whether it relates to my own or another's unit
- I will store information that I obtain under secure conditions
- I will maintain the privacy and confidentiality of the information that I obtain
- I will make every reasonable effort to interpret the information I obtain in an accurate and professional manner and will not modify or delete information unless authorized to do so
- I will ensure that the recipient is authorized to receive information and understands his/her responsibilities as a user before sharing information/data with others by any means
- I will sign off the automated system when I am not actively using it
- I will keep my password(s) to myself and will not disclose it (them) to others unless my immediate supervisor authorizes such disclosure in writing • I will store and secure confidential/sensitive information, data, reports, etc. in a manner that will maintain their confidentiality when I am not actively using it
- I will dispose of confidential/sensitive information/data in a manner that will preserve its confidentiality when I have finished using them

I understand that if I misuse personal information/data/electronic systems that I obtain through my employment, I will be subject to disciplinary action up to and including termination.