

WBG Departmental Access Request Form – NY

Employee Name:	Employee Number:	Employee CWID:
New User	Change Access	Position Change (will replace existing access as noted in this form)
		Deactivate WBG Access

Department Administrator Access

Administrator Type

The Department Administrator (DA), Department Designee (DD) and Division Administrator (DivA) by default contain access to the following applications: BI Reporting (FM/GM, Purchasing/AP, Payroll, HR), Shopping Cart Entry & Approval and eForm Fund Create & Approval. In addition, DA/DD's have access to the following applications: System Access Requests, Change of Funding Entry & Approval, Budget & Planning Entry/Approval, and Space Management. Clinical DA's and DD's will have Medical Service Agreement access.

Indicate the required Fund Center(s) and the level of access to "Add" or "Remove".

Funds Center	Funds Center
Funds Center	Funds Center
Funds Center	Funds Center

Time Administrator Approval access is optional. If access is desired, indicate the Sub Area(s) to "Add" or "Remove".
Provides access to approve time for the designated sub area(s)

Time Administrator Approval

Sub Area	Sub Area
Sub Area	Sub Area

Time Keeper access is optional. If access is desired, select "Add".

Provides access to Enter Time for your Department or Division. Access is restricted to the employees where you have a DA, DD, or DivA Fund Center relationship.

Time Keeper

For Clinical Departments only. If access is desired, select "Add".

Provides access to both Enter and Approve Supplemental Compensation.

Supplemental Compensation

Division Administrator (Part 2 - Optional)

Indicate the required Fund Center(s) to "Add" or "Remove".

Provides access to enter Change of Funding. There is no Change of Funding approval with this position.

Change of Funding

Funds Center	Funds Center
Funds Center	Funds Center

Indicate the required Fund Center(s) and the level of access to "Add" or "Remove".

Provides access to enter Supplemental Compensation. There is no Supplemental Compensation approval with this position.

Supplemental Compensation

Funds Center	Funds Center
Funds Center	Funds Center

Division Administrator (Part 2 Continued- Optional)

Indicate the required Fund Center(s) and the level of access to "Add" or "Remove".

Provides access to maintain contracts and sales orders for a clinical department and run MSA reports by Fund Center.

Medical Service Agreement (MSA) Administrator

Funds Center
Funds Center

Funds Center
Funds Center

Non-Department Administrator Access

Purchasing Access

Indicate the position(s) to "Add" or "Remove".

Provides access to create a shopping cart

Purchase Requisition Entry

Provides access to Purchasing Reports

Purchase Reporting

Provides access to liquidate PO's

Purchase Order Liquidation

Funds Center
Funds Center

Provides access for a Non-Department/Division Head to approve at the fund/SP level in the workflow

Shopping Cart First Level Approver

Funds Center
Funds Center
Funds Center

Indicate the position(s) to "Add" or "Remove".

Department-specific product category approvals and Goods Receipt. For RARC, OHP, ITS, EHS and Sidra departments only.

Sidra Shopper

Sidra First Level Approver

Sidra Division Head

Sidra Department Head

Funds Center(s):

RARC Shopping Approval

OHP Shopping Approval

ITS-NY Shopping Approval

EHS Purchasing Goods Receipt

Note: For P-Card access, complete the additional form available [here](#).

Time Management Access

Indicate "Add" or "Remove" for each Sub Area.

Time Admin Provides access to approve time for the designated sub area(s). Time Keeper provides access to maintain the time for employees and all Sub Areas. No approval access.

Time Administrator:

Sub Area
Sub Area

Sub Area
Sub Area

Time Keeper:

Compensation Access

Indicate the required Fund Center(s) to "Add" or "Remove".

Provides Entry only access in the Fund Center(s) indicated.

Change of Funding Entry

Funds Center
Funds Center

Clinical Supplemental Compensation Entry

Funds Center
Funds Center

Auxiliary Billing Access

Indicate "Add" or "Remove".

Provides access to administer billing activities within the noted departments. Access is only applicable to the departments listed.

Duplicating

ITS

NYPH

RARC

Research Core

Epigenomics Core

BI Reporting Access (access details on page 5)

Indicate the required Fund Center(s) to "Add" or "Remove".

Provides BI reporting access by category for the specified fund center(s). Reports in each category are documented on page five.

BI Finance Reporting

(Funds, Grants, Accounts Payable, Purchasing)

Funds Center

Funds Center

Funds Center

BI Personnel Reporting

BI Payroll Reporting

Funds Center

Funds Center

Funds Center

Indicate the required Fund(s) or Sponsored Program(s).

Provides BI reporting for faculty members by specific Fund(s) or Sponsored Program(s). Reports in this role are documented on page five. **BI ITS Billing** provides access to "ITS Billing Details" and "ITS Scorecard" reports; as well as the ability to submit ITS request forms that require SAP funds on myHelpdesk.

BI ITS Billing

Fund(s) & Sponsored Program(s):

BI Faculty Reporting

Space Management

Indicate the position(s) to "Add" or "Remove" and the required Fund Center(s).

Provides access to maintain space and inventory associated to your department. This access is entry only.

Space Management Department Entry

Funds Center

Funds Center

Learning Management System Access

Indicate the position(s) to "Add" or "Remove". Content Admin provides allows for the managing of content. Item Admin provides curricula and course related access.

Content Admin

Item Admin

Scheduler

Reporting

Instructor

Assignment Profile

Budget and Planning

Indicate the position(s) to "Add" or "Remove". Access may be requested for specific funds or funds centers. If the user should get access to all the accounts that roll up to a Funds Center, then request the Funds Center. If requesting for more than four (4) funds, please attach a separate Text file or Excel Document. For an overview of each position, please use [the SBP overview document](#).

Budget Entry OTPS

Budget Entry Salary

Fund(s) or Funds Center

Fund(s) or Funds Center

Budget Reviewer 1

Budget Reviewer 2

Fund(s) or Funds Center

Fund(s) or Funds Center

Electronic Forms (eForms)

Indicate the eForm to “Add” or “Remove”.

Provides access to create and approve electronic forms. Approver roles require a Fund Center selection.

T&E First Level Approver

Payment Req. First Level Approver

Funds Center

Funds Center

Fund Create

Payment Req. and T&E Entry – Non-Employee

Funds Center

Funds Center

Medical Service Agreement (MSA)

Indicate the required Fund Center(s) and the level of access to “Add” or “Remove”.

Provides access to maintain contracts and sales orders for a clinical department and run MSA reports by Fund Center.

Medical Service Agreement (MSA) Administrator

Funds Center

Funds Center

Funds Center

Funds Center

Personnel Administration

Indicate “Add” or “Remove”.

Provides the ability to proxy into all managers that roll-up to the Department Fund Center hierarchy indicated for the requested SuccessFactors module.

Recruitment Admin

Funds Center/Org Unit

Funds Center/Org Unit

Performance & Goals Admin

Funds Center/Org Unit

Funds Center/Org Unit

Additional Comments

Notes

- All positions requested require that you attend a training session. To schedule a training session, please contact the training team at: wbg-training@med.cornell.edu
- The Department Administrator/Department Designee must attach this completed request form within WBG Access Request by opening a WBG Access Request. To open an Access Request, log in to the WBG and click on the “System Access” tab followed by the “Create Access Request” link.
- All accounts that have not been active in the WBG for 90 days will be reviewed for inactivity.

BI Reporting Access Details

Report Area	Report Name	Funds & Grants	Purchasing & AP	Finance	Personnel	Payroll	Faculty
FI-Funds & Grants	Discretionary Fund Statement (4*, 5*, 6*, 8*)	X		X			X
FI-Funds & Grants	Fund Detail Statement	X		X			X
FI-Funds & Grants	Fund Master Data	X		X			X
FI-Funds & Grants	Fund Responsible Assignments	X		X			X
FI-Funds & Grants	Fund Statement (1*, 3*)	X		X			X
FI-Funds & Grants	Funds Reservation Details	X		X			X
FI-Funds & Grants	Grant Detail Statement	X		X			X
FI-Funds & Grants	Grant Responsible Assignments	X		X			X
FI-Funds & Grants	Grant Statement	X		X			X
FI-Funds & Grants	Journal Voucher Details	X		X			X
FI-Funds & Grants	Open Commitments	X		X			X
FI-Funds & Grants	PO Fund Statement	X		X			X
FI-Funds & Grants	Project Fund Statement	X		X			X
FI-Funds & Grants	Sponsored Program Master Data	X		X			X
FI-Funds & Grants	Research Visibility – Finance			X			X
FI-SRM/AP	Accounts Payable Details		X	X			X
FI-SRM/AP	Good Receipt Details by Fund		X	X			X
FI-SRM/AP	Good Receipt Details by SP		X	X			X
FI-SRM/AP	Invoice/Purchase Order Summary		X	X			
FI-SRM/AP	Line of Credit Order Details		X	X			
FI-SRM/AP	Purchase Order Details		X	X			X
FI-SRM/AP	Purchase Order Life Cycle		X	X			
FI-SRM/AP	Shopping Cart Approval Trail		X	X			
FI-SRM/AP	Shopping Cart by Status		X	X			
FI-SRM/AP	Shopping Cart Details		X	X			
HR-Personnel	Employee Action History				X		
HR-Personnel	Employee Basic Data				X		
HR-Personnel	Number of Personnel Actions by Start Date				X		
HR-Payroll	Employee Planned Funding by Fund					X	X
HR-Payroll	Employee Planned Funding by Organizational Unit					X	
HR-Payroll	Employee Planned Funding by WBS					X	X
HR-Payroll	Labor Commitment/Consumption Details by Fund					X	X
HR-Payroll	Labor Commitment/Consumption Details by Organizational Unit					X	
HR-Payroll	Labor Commitment/Consumption Details by SP					X	X
HR-Payroll	Labor Distribution by Fund					X	X
HR-Payroll	Labor Distribution by Organizational Unit					X	
HR-Payroll	Labor Distribution by WBS					X	X
HR-Payroll	Research Visibility – Labor					X	