## 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

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### 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**

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### 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* | *Provides access for a Non-Department/Division Head to approve at the fund/SP level in the workflow* |
| **Purchase Requisition Entry** | |
| *Provides access to Purchasing Reports* | **Shopping Cart First Level Approver** |
| **Purchase Reporting** | Funds Center |
| | Funds Center |
| *Provides access to liquidate PO's* | Funds Center |
| **Purchase Order Liquidation** | |
| 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** | **RARC Shopping Approval** |
| **Sidra First Level Approver** | **OHP Shopping Approval** |
| **Sidra Division Head** | **ITS-NY Shopping Approval** |
| **Sidra Department Head** | **EHS Purchasing Goods Receipt** |
| Funds Center(s): | |

*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** | **Clinical Supplemental Compensation Entry** |
|---|---|
| Funds Center | Funds Center |
| 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** | **RARC** |
| **ITS** | **Research Core** |
| **NYPH** | **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** | **BI Personnel Reporting** |
|---|---|
| (Funds, Grants, Accounts Payable, Purchasing) | **BI Payroll Reporting** |
| Funds Center | Funds Center |
| Funds Center | 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". This is part of BI Finance Reporting.*

| **BI ITS Billing** | **BI Faculty Reporting** |
|---|---|
| Fund(s) & Sponsored Program(s): | |

| 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** | **Scheduler** | **Instructor** |
| **Item Admin** | **Reporting** | **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 Reviewer 1** |
| **Budget Entry Salary** | **Budget Reviewer 2** |
| Fund(s) or Funds Center | Fund(s) or Funds Center |
| 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**                **Fund Create**
**Payment Req. First Level Approver**        **Payment Req. and T&E Entry – Non-Employee**
Funds Center                                 Funds Center
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**                        **Performance & Goals Admin**
Funds Center/Org Unit                        Funds Center/Org Unit
Funds Center/Org Unit                        Funds Center/Org Unit

## Additional Comments

## Notes

o  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
o  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.
o  All accounts that have not been active in the WBG for 90 days will be reviewed for inactivity.

| Report Area | Report Name | Funds & Grants | Purchasing & AP | Finance | Personnel | Payroll | Faculty |
|---|---|---|---|---|---|---|---|
| **BI Reporting Access Details** | | | | | | | |
| 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 | |