Purpose: Instructions for requesting access to the following applications:
* Internet Procurement
* General Ledger
* Financial Data Warehouse

Prerequisites to requesting access: Prior to gaining access to Rutgers’ applications the applicant must be an active University employee and have a NetID. For instructions on creating a NetID, please go to http://oit.rutgers.edu/services/account/quick.html.

It is also required that the applicant read and accept the Agreement for Accessing University Information. A NetID is required to access and accept this agreement.

The authority to prepare or approve financial transactions (including requisitions, JEs and/or budget adjustments) should be assigned to regularly appointed employees (Employee Class 1, 6, 7, or 9) who are capable of performing at a level that will meet the Basic Expectations for Approvers or Preparers. Student employees (Class 5) will not be granted authority as Preparers. Temporary employees (Classes 3 and 4) will not be granted authority as Preparers unless the unit documents a compelling need that would justify the frequent systems maintenance required for transient classes of employees.

RIAS Internet Procurement and Financial Applications Access Request Form: Using the instructions below, fill out the RIAS Internet Procurement and Financial Applications Access Request Form. Completed and signed forms should be forwarded to University Controller, 65 Davidson Road, Room 308, Busch Campus or faxed to 732-445-2796. Completed forms may also be scanned and emailed to financial-access@uco.rutgers.edu.

Section 1: Applicant Information

All fields in this section are required except for “Position #” which will be filled in by the University Controller’s Office when the form is submitted for processing.

Section 2: RIAS Internet Procurement (IP) & General Ledger (GL) Roles

Access: TYPE IN the kind of access being requested.

- **New Access:** This option is for the first time access requesters.
- **Update/Change Access:** This option is for those who already have access and are requesting a change to their existing role or hierarchy information.
- **Delete All Access:** Use this option if requesting that all RIAS Roles and Responsibilities and Financial Data Access be deleted. If this option is being used, go to Section 5: Applicant Review and Approval.
- **Termination:** Managers should select this option if they are submitting a request for an individual who has terminated employment at the University. This will delete all RIAS Roles and Responsibilities as well as Financial Data Access.
RIAS Internet Procurement (IP) Roles:

Roles: TYPE IN all applicable RU Internet Procurement and/or General Ledger role(s) for which the applicant is requesting access.

- **Preparer**: Provides the ability to prepare requisitions in the Internet Procurement application. If this role is selected, the name of the person to whom the applicant reports in the RIAS Approval Hierarchy must be provided. This would be the person who would be responsible for approving the applicant’s requisitions, journals and/or other transactions.

- **Approver – Level 1**: Approver roles require that specific Org IDs be provided. The Org IDs identify the fund source(s) for which the applicant may approve requisitions. The Approver Level 1 role allows approval of requisition up to $10,000 within the approved Org IDs.

- **Approver – Level 2**: Approver roles require that specific Org IDs be provided. The Org IDs identify the fund source(s) for which the applicant may approve requisitions. The Approver Level 2 role allows approval of all requisitions within the approved Org IDs.

RIAS General Ledger (GL) Role:

- **RU GL Journals**: Check this box to be allowed to enter or approve journal entries and do manual encumbrances.

Basic Expectations for Approvers and Preparers:

Anyone requesting access using this request form must read and accept the Basic Expectations for Approvers or the Basic Expectations for Preparers. The Basic Expectations statements can be found following the application form.

After reading the Basic Expectations for Approvers or the Basic Expectations for Preparers, the applicant must hand initial and date this section of the form confirming that he/she has read and accepted these responsibilities.

Agreement for Accessing University Information

It is also required that the applicant read and accept the Agreement for Accessing University Information. The applicant must hand initial and date this section of the form.

Person to whom the applicant is reporting in the RIAS Approval Hierarchy: Required for all roles except Approver Level 2.

- **Name**: Name of person to whom the applicant is reporting in the Approval Hierarchy.
- **NetID**: The NetID of the person to whom the applicant is reporting in the Approval Hierarchy.
- **Email Address**: The email address of the person to whom the applicant is reporting in the Approval Hierarchy.
- **Position #**: This will be filled in by the University Controller’s Office when the form is submitted for processing.
Org ID#: This is required for all Approvers. The five-digit Organization Code ID for which the applicant will be approving requisitions and/or other transactions. As an Approver, the applicant will be able to approve transactions within all fund source(s) associated with the organization code. However, journal approval routing is based on the applicant’s Approver in the hierarchy or the designated Approver the applicant selected to override the default.

Section 3: RIAS Special Purchasing Roles

TYPE IN the kind of access being requested, i.e. New Access, Update/Change Access, Delete All Access or Termination.

Select if the applicant is requesting access to this role.

RIAS Special Purchasing Role:

- **Delegated Buyer (ORSP):** This role establishes the applicant as a “Buyer” for designated ORSP subcontract preparation. This role has two (2) levels, a purchase order Preparer level and an Approver level. Both have limited buyer responsibilities. The Preparer level creates the Subcontract purchase order which, when submitted, goes to a designated ORSP Approver. An ORSP Approver can prepare and approve Subcontract purchase orders.

Section 4: Financial Data Access (Financial Data Warehouse & REX*)

TYPE IN the kind of access being requested: i.e. New Access, Update/Change Access, Delete All Access or Termination.

Select the applicable Financial Data Warehouse role(s) for which the applicant is requesting access.

**Financial Data Warehouse (FDW) Roles:** At least one Extended Budget Responsibility Code (EBRC) must be provided.

- **FIN: Purchasing, Payables & General Ledger Information:** Provides access to all financial data, except for payroll data, associated with the EBRC.
- **LPR: Payroll Distribution and Budget Information:** Provides access to payroll data associated with the EBRC.
- **EBRC:** The nine-digit Extended Budget Responsibility Codes for which the applicant is requesting access. If this information is unknown, please contact the applicant’s local Business Manager.
- **If REX access is requested, access will default to the same EBRC(s). However, an additional form for departmental REX access is required.**
Section 5: Applicant Review and Approval

- Prior to approving this request, please ensure the applicant has accepted the Agreement for Accessing University Information and the Basic Expectations for Approvers or the Basic Expectations for Preparers.
- Requests for access must be reviewed and approved by the applicant’s Business Manager, if required by that Department.
- The review and approval of the a Dean, Director, or Department Chair is required.
- Authority to access specific administrative data must also come from the appropriate Business Process owners(s) responsible for the data. Requests will not be processed without the appropriate signatures.

Section 6: This section is reserved for use by the individual areas that are responsible for implementing the requested access.

Inactivity of Access: Every year in July, users who have not accessed the RIAS Internet Procurement or General Ledger application for the prior 24 months will be deactivated.

If there are any questions as to the status of a pending request, please email financial-access@uco.rutgers.edu.