URGEMS Security Request Form QRC

The URGEMS Security process has recently been changed to a centralized model. This Quick Reference Card (QRC) has been created to outline the general steps to request or change access in the system.

University of Rochester Security Request Form for URGEMS

1. Go to the URGEMS website and locate the *Access Form* link

2. Enter your NetID and password to view the form details.

University of Rochester Security Request Form for URGems

This form is to be completed by the individual requesting security permissions, and at a minimum requires a manager's signature. In cases where the requester requires company level permissions or Grants permissions, additional signatures are needed. Please refer to the Role sheet to define the roles that can be requested.

Logout

Requester:	Sally Field	Cost Center:	Phlebotomy
Requester NetID:	sfield		
Requester EMail:	Sfield@UR.Rochester.edu		
Date of Request:	09/14/2016		

☐ I agree to the following *required

*Note: The access or use of any University of Rochester data for one's own personal gain of profit, for the personal gain of profit of others, or to satisfy one's own personal curiosity or that of others is EXPRESSLY FORBIDDEN. Also forbidden is the disclosure of distribution of University of Rochester data in any medium, except as required by this employee's job responsibilities. Violations of these guidelines will be dealt with seriously, up to and possibly including employment termination.

☐ Check if you need access to URGEMS Ad-Hoc Reporting? This will require training.

| Add / Delete | Company(s) | OR | Cost Center(s) | OR | FAO(s) / Grant(s) | Role | |
| Add ⌄ | -- Select One -- ⌄ | | -- Select One -- ⌄ | | | -- Select One -- ⌄ | Add New Row |

Senior Administrator/Manager (Printed Name): _____ Senior Administrator/Manager (Signature): _____ Date: _____

Additional Signature required for company level access:

Company Finance Director(Printed Name):_____ Company Finance Director(Signature):_____ Date_____

Print out, gather signatures, scan and send completed form to **URGEMSSecurityAdmin@ur.rochester.edu**

Internal Use Only:

UR Gems Security (Printed Name):_____ UR Gems Security (Signature):_____ Date_____

[Reset Form] [Print]

Form Instructions

3. Verify the employee information at the top of form is correct. Make any necessary changes.
4. Select the check box to agree to the Disclosure Statement
5. Select the second check box if you need access to URGEMS Ad Hoc Reporting
6. Choose access level requested (See page 2)
7. Print form at bottom of page
8. Acquire all necessary approvals/signatures
9. Scan and email completed form to URGEMSSecurityAdmin@ur.rochester.edu

UR Financials

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Choosing Access Level *in detail*

Requesting <u>New</u> Access:

A. Keep the *Add/Delete* drop down to **Add**
B. Choose a company from the *Company(s)* drop down menu, if requesting company level access
C. OR Select a cost center from the *Cost Center(s)* drop down menu, if needing access to a Cost Center
D. OR type in an FAO(s)/Grant(s) in the *FAO(s)/Grant(s)* field
E. Select the appropriate Role from the *Role* drop down menu. *See page three (3) of QRC*
F. Select the Add New Row button if you need to enter more data; either Company, Cost center, or FAO/Grant

> Removing Access to the system is by email request from the Senior or Department Administrator with employee information sent to URGEMS Security Admin URGEMSSecurityAdmin@UR.Rochester.edu

Changing Access for Existing Users:

A. Set the *Add/Delete* drop down to **Add,** or **Delete** to remove access (i.e. transfers)
B. If requesting company level access, choose the company to get access on from the *Company(s)* drop down menu, or skip if not needed
C. Select a cost center from the *Cost Center(s)* drop down menu, if needing access to a Cost Center (department)
D. Type in an FAO(s)/Grant(s) in the *FAO(s)/Grant(s)* field
E. Select the appropriate Role from the *Role* drop down menu. *See page three (3) of QRC*
F. Select the **Add New Row** button if you need to enter more data; either Company, Cost center, or FAO/Grant

UR Financials

UNIVERSITY *of* ROCHESTER

URGEMS Security Roles

	PI	Co-Investigator	Non-Sal Data Entry	Non-Sal Reconciliation	Sal Data Entry	Sal Reconciliation	Sr. Data Entry	Sr. Reconciliation	Dept. Administrator	Sr. Dept. Administrator
Agency										
Agency - Add										
Agency - Update										
Agency - Delete with Data										
Agency - Delete w/o Data										
Award										
Award - Add							✓	✓	✓	✓
Award - Update							✓	✓	✓	✓
Award - Update status to Awarded							✓	✓	✓	✓
Award - Delete								✓	✓	✓
Accounts										
Account - Add							✓	✓	✓	✓
Account - Update							✓	✓	✓	✓
Account - Delete							✓	✓	✓	✓
Subcodes										
Subcode - Add			✓			✓	✓	✓	✓	✓
Subcode - Update			✓			✓	✓	✓	✓	✓
Subcode - Delete							✓	✓	✓	✓
Encumbrances										
Encumbrance - Add			✓	✓		✓	✓	✓	✓	✓
Encumbrance - Update			✓	✓		✓	✓	✓	✓	✓
Encumbrance - Delete			✓	✓		✓	✓	✓	✓	✓
NonSal Expenses										
NonSal Expense - Add			✓	✓		✓	✓	✓	✓	✓
NonSal Expense - Update			✓	✓		✓	✓	✓	✓	✓
NonSal Expense - Delete							✓	✓	✓	✓
Employees										
Add employees					✓	✓	✓	✓	✓	✓
Update employees					✓	✓	✓	✓	✓	✓
Delete employees							✓	✓	✓	✓
Appointment										
Add appointment					✓	✓	✓	✓	✓	✓
Update appointment					✓	✓	✓	✓	✓	✓
Delete appointment							✓	✓	✓	✓
Salary										
Add salaries					✓	✓	✓	✓	✓	✓
Update salaries					✓	✓	✓	✓	✓	✓
Delete salaries							✓	✓	✓	✓
Salary Distribution										
Add Distribution					✓	✓	✓	✓	✓	✓
Update salary distributions					✓	✓	✓	✓	✓	✓
Split salary distributions					✓	✓	✓	✓	✓	✓
Delete salary distributions							✓	✓	✓	✓
Run MakePay Process							✓	✓	✓	✓

	PI	Co-Investigator	Non-Sal Data Entry	Non-Sal Reconciliation	Sal Data Entry	Sal Reconciliation	Sr. Data Entry	Sr. Reconciliation	Dept. Administrator	Sr. Dept. Administrator
Salary Expenses										
Add salary expenses					✓	✓	✓	✓	✓	✓
Update salary expenses						✓	✓	✓	✓	✓
Delete salary expenses							✓	✓	✓	✓
Update Expense via salary reconciliation screen							✓	✓	✓	✓
NonSal Reconciliation										
Add Encumbrances				✓				✓	✓	✓
Close Encumbrance				✓				✓	✓	✓
Update Expenses				✓				✓	✓	✓
Salary Reconciliation										
Add salary expenses						✓		✓	✓	✓
Update a salary Expense						✓		✓	✓	✓
Delete salary expenses								✓	✓	✓
Admin										
Add a user										
Update a user										
Delete a User										
Add/Update a Unit										
Modify Dept Prefs									✓	✓
Modify Validation Tables										
Add a Division										
Reports										
1. Non-Salary Encumbrance/Expense Status	✓		✓	✓	✓	✓	✓	✓	✓	✓
2. Salary Expense	✓				✓	✓	✓	✓	✓	✓
3. Employee Salary Expense	✓				✓	✓	✓	✓	✓	✓
4. Cumulative Salary	✓				✓	✓	✓	✓	✓	✓
5. Cumulative Salary Report by Account	✓				✓	✓	✓	✓	✓	✓
6. Salary Source Report	✓				✓	✓	✓	✓	✓	✓
7. Salary % of Distribution	✓				✓	✓	✓	✓	✓	✓
8. PI Employee % Distribution	✓				✓	✓	✓	✓	✓	✓
9. PI Account Distribution	✓				✓	✓	✓	✓	✓	✓
10. Chart of Accounts	✓		✓	✓	✓	✓	✓	✓	✓	✓
11. Account Summary	✓		✓	✓	✓	✓	✓	✓	✓	✓
12. Account Detail	✓		✓	✓	✓	✓	✓	✓	✓	✓
13. Account Subcode Attribute 2	✓		✓	✓	✓	✓	✓	✓	✓	✓
14. Award Report	✓		✓	✓	✓	✓	✓	✓	✓	✓
15. Key Personnel Effort Report	✓		✓	✓	✓	✓	✓	✓	✓	✓