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

- Go to the <u>URGEMS</u> website and locate the *Access Form* link
- 2. Enter your NetID and password to view the form details.



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



Univers	sity of Ro	ches	ter Se	curi	ty Request	Form fo	r UR(Gems
This form is to be cor	npleted by the ind	lividual re	equesting see	curity pe	ermissions, and at a	minimum require	s a mana	ger's signature. In
cases where the reque	ster requires comp	pany leve	l permission	s or Gra	ants permissions, ad	ditional signature	s are nee	ded. Please refer to
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Requester:	Sally Field		Cost Ce	inter: P	hlebotomy			
Requester NetID:	stield	- 6						
Requester EMail:	Sfield@UR.Rochester.edu							
Date of Request:	09/14/2016							
I agree to the following 🐄	equired 4							
*Note: The access or us	e of any University o	f Rocheste	er data for one	's own pe	ərsonal gain of profit, for	the personal gain (of profit of	others, or to satisfy
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Created on: 09/14/16

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OR

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Cost Center(s)

Select One --

FAO(s) / Grant(s)

Choosing Access Level in detail

Requesting <u>New</u> Access:

A. Keep the Add/Delete drop down to Add

Add / Delete

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

Company(s)

Select One --

- E. Select the appropriate Role from the *Role* drop down menu. <u>See page three (3) of QRC</u>
- F. Select the Add New Row button if you need to enter more data; either Company, Cost center, or FAO/Grant

<u>Removing</u> 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

<u>Changing</u> Access for Existing Users:

Role

Co-Investigator Non-Sal Data Entry Non-Sal Reconciliation Sal Data Entry Sal Reconciliation Sr. Data Entry

Sr. Reconciliation Dept. Administrator Sr. Dept. Administrator

System Administrator

A. Set the *Add/Delete* drop down to **Add,** or **Delete** to remove access (i.e. transfers)

Add New Row

- 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. <u>See page three (3) of QRC</u>
- F. Select the Add New Row button if you need to enter more data; either Company, Cost center, or FAO/Grant







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							<pre>/</pre>	~	~	~
to Awarded									- /	
Award - Delete				L				~	~	~
Accounts									1	
Account - Add					<u> </u>		V .	×	×	×
Account - Update							×	*	*	*
Account - Delete						ļ	v	v	~	~
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Subcode - Add				× ·		× ·	¥	×	*	¥
Subcode - Opulie Subcode - Delete				- ·	<u> </u>	⊢ Ť	Ě	ž	~	ž
Subcode - Delete							v	v	•	*
Encumbrance - Add	1		~	~	1	~		~	~	~
Encumbrance - Undate			~				Ż	~	~	~
Encumbrance - Delete			~	~	-	~		~	~	~
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NonSal Expense - Hod				-		~	·	- ·	1	· ·
NonSal Expense - Delete			-	-		-	~		1	-
Funloyees		-	-	_	-			1.		
Add employees		-	1	-	~ 1	~ 1	~	1.	1	
Update employees					~	~	~	~	~	~
Delete employees							~	~	~	×
Appointment										
Add appointment					~	~	~	V	V	
Update appointment					~	~	~	V	×	×
Delete appointment						~	~	~	~	~
Salary	• • •									
Add salaries					~	~	~	V	V	
Update salaries					~	~	~	~	~	×
Delete salaries						~	~	~	~	~
Salary Distribution										
Add Distribution					~	~	~	~	~	×
Update salary distributions					~	~	~	~	~	×
Split salary distributions					~	~	~	1	~	×
Delete salary distributions						~	~	1	~	
Run MakePay Process						~	~	1	~	~

					_					
	Ы	Co-Investigator	Non-Sal Data Entry	Non-Sal Reconciliation	Sal Data Entry	Sal Reconciliation	Sr. Data Entry	Sr. Reconciliation	Dept. Administrator	Sr. Dept. Administrato
Salary Expenses										
Add salary expenses		1			×	×	~	I 🗸	 ✓ 	~
Update salary expenses					~	~	~	~	~	~
Delete salary expenses						~	~	~	~	~
Update Expense via salary						~	~	~	~	~
NonSal Reconciliation										
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Close Encumbrance				¥				Ť	×	~
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Salary Reconcination					1					
Add salary expenses						v		· ·	×	×
Update a salary Expense						v		×	×	×
Delete salary expenses								~	~	V
Admin					1			1		
Add a user					ļ					
Update a user										
Delete a User										
Add/Update a Unit										
Modify Dept Prefs									~	~
Modify Validation Tables										
Add a Division										
Reports										
 Non-Salary 	~		~	~	 	~	~	~	~	\checkmark
Encumbrance/Expense Status										
Salary Expense	✓				 ✓ 	~	~	~	~	\checkmark
Employee Salary Expense	~				 	~	~	~	~	\checkmark
 Cumulative Salary 	~				~	~	~	~	~	 ✓
 Cumulative Salary Report by Account 	1				`	~	~	~	~	~
Salary Source Report	~	_7		l	1	✓	~	✓	~	\checkmark
Salary % of Distribution	~				 ✓ 	×	 ✓ 	 ✓ 	✓	×
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9. PI Account Distribution	 ✓ 				 V 	×	 ✓ 	×	 ✓ 	 ✓
Chart of Accounts	~		~	V	V	~	~	~	~	 ✓
11. Account Summary	~		~	 V 	 V 	×	 	 ✓ 	 ✓ 	
12. Account Detail	V		✓	V	 V 	V	V.	 	×	✓
13. Account Subcode Attribute 2	v		V	V .	×	×	×	×	×	×
14. Award Report	V		V	V	✓	×	V	×	×	V
 Key Personnel Effort Report 	v		~	V	V	V	~	✓	V	V