# UC ANR Aggie Enterprise Access Request

Complete access request form below and route for approvals.  Please note before roles are provisioned, training will be required.  Additionally, contingent workers will have a longer processing time for the profile to be created.

## EMPLOYEE INFORMATION

| Name: | Job Title: | EMPLID: |
|---|---|---|
| Email: | Dept: | UCD Kerberos ID: |
| Effective Date: | End Date (if applicable) | Request Type |
| *Justification: Please provide business justification for access.* | | |

## ROLES REQUESTED:

Please select the closest persona to your role in Aggie Enterprise as this will be used for roles.

| Academic | Administrative Inquiry | Administrative Support | BOC Analyst |
|---|---|---|---|
| BOC Supervisor | Director | Financial Assistant | Financial Services Analyst |
| Financial Services Supervisor | Fiscal Officer | Office Manager | RPM Analyst |
| RPM Supervisor | SWPR Analyst | SWPR Supervisor | Technical Support |
| If not listed, please explain: | | | |

## FISCAL OFFICER APPROVAL ROLES

Please list all applicable fiscal officer approver departments, for example 9923241 UCCE Sacramento.

## ACCESS REQUEST APPROVALS

Please route the form according to the workflow below.

| #1 Supervisor: | #3 UC ANR Financial Services: |
|---|---|
| #2 Security Liaison: rjgoradia@ucanr.edu: | #4 Ad-Hoc Routing for Exception: |

V3.0 February 2024

**Inquiry Roles with Description:**

| | |
|---|---|
| UCD General Ledger Inquiry JR | This role has access to:<br>- Access to search journals via the dashboard<br>- View GL transactions<br>- View journals<br>- View accounting periods<br>- View recurring and reversal journals |
| UCD General Ledger Journal Entry JR | This role has access to:<br>- Access to search journals via the dashboard<br>- Enter, copy, reverse, delete journals<br>- Upload journals through spreadsheet<br>- Import/correct Journals<br>- Generate subledger journals<br>- View and run GL reports and process |
| UCD Receivables Adjustments and Write-offs JR | This role has access to:<br>- Create/Manage Receivables Credit Memo<br>- Manage Receivables Adjustment<br>- Manage Write-offs |
| UCD Receivables Inquiry JR | This role has access to:<br>- View customers, customer account details<br>- View invoices |
| UCD Receivables Invoice Entry JR | This role has access to:<br>- Create/Manage Receivables Invoice |
| UCD Fixed Assets Inquiry JR | This role has access to:<br>- View asset additions<br>- View asset adjustments<br>- View asset transfers, retire and reinstatement of assets<br>- View asset information |
| UCD Budget Inquiry JR | This role has access to:<br>- View Budgets |
| UCD Budget Transactions JR | This role has access to:<br>- Update or Correct budget |
| UCD Payables Inquiry JR | This role has access to :<br>- View invoices, payments, suppliers<br>- View reports |
| UCD Purchasing Inquiry JR | This role has access to:<br>- View only access for procurement transactions (Including purchase agreements, purchase orders, and purchase requisitions)<br>- View suppliers |
| UCD Purchasing Receiving JR | This role has access to:<br>- Receive expected shipment lines<br>- Correcting received lines<br>- Managing returns |
| UCD Purchasing Requisition Entry JR | This role has access to:<br>(Confined to campus users ONLY)<br>-Create and manage procurement requisitions<br>-Enter line item receiving |
| UCD Projects Cost Inquiry JR | This role has access to:<br>- View project costs<br>- View project invoice<br>- View project revenue |
| UCD Projects Inquiry JR | This role has access to:<br>-View project Master Data |

| | |
|---|---|
| UCD Projects Maintenance JR | This role has access to:<br>- Edit projects |
| UCD Projects Cost Adjustment JR | This role has access to - Transfer Costs |
| UCD Grants Inquiry JR | This role has access to:<br>- View awards<br>- View contracts |
| UCD BI Consumer JR | This role has access to:<br>- Run Business Intelligence Reports<br>*Please note: Users must have this role along with Inquiry roles in order to run/view reports allowed via those Inquiry roles* |

**Transactional Roles**

| | |
|---|---|
| UCD General Ledger Journal Entry JR | This role has access to:<br>- Access to search journals via the dashboard<br>- Enter, copy, reverse, delete journals<br>- Upload journals through spreadsheet<br>- Import/correct Journals<br>- Generate subledger journals<br>- View and run GL reports and process |
| UCD Receivables Adjustments and Write-offs JR | This role has access to:<br>- Create/Manage Receivables Credit Memo<br>- Manage Receivables Adjustment<br>- Manage Write-offs |
| UCD Receivables Invoice Entry JR | This role has access to:<br>- Create/Manage Receivables Invoice |
| UCD Budget Transactions JR | This role has access to:<br>- Update or Correct budget |
| UCD Purchasing Receiving JR | This role has access to:<br>- Receive expected shipment lines<br>- Correcting received lines<br>- Managing returns |
| UCD Purchasing Requisition Entry JR | This role has access to:<br>(Confined to campus users ONLY)<br>-Create and manage procurement requisitions<br>-Enter line item receiving |
| UCD Projects Maintenance JR | This role has access to:<br>- Edit projects |
| UCD Projects Cost Adjustment JR | This role has access to - Transfer Costs |