Single Click Access to...

- Email & Calendar
- Student & HR Administration
- CSU Portal - Financial Administration
- PolyData Dashboards
- Student Assistant Management
- MustangJOBS: Job Listings for Students
- Electronic Workflow
- Technical Service Request
- Facilities Requests
- Telephone Administration
- Email Distribution Lists

4 hidden links
Hide/Show Links

NOTICE: This form is for CMS (Student, HR Administration, and Finance) accounts only.
If you are requesting an account for the Advance application, please submit a "Account Requests" ticket.

Select the CMS Account Request type:
- *Request Types:
  - New User
  - Add/Change/Remove (partial) current security
  - Remove (ALL) current security

Enter short description of request (e.g.; New CMS Request - jmustang):

*Summary:

In the summary field enter "Access to PeopleSoft Financials".

Recipient Information - Technical Access

Enter the Recipient's Cal Poly Username (e.g. jmustang):

*Username: Enter you Cal Poly user name click on Lookup Recipient.

Full Name:
Dept ID:
Dept:

Email:
Role:
Phone:

Be sure to click this box.

Responsible Use Policy (RUP), Confidentiality/Security Agreement Verification:
Cal Poly (RUP) forms: Student (RUP) and New Employees (RUP) - Cal Poly Confidentiality/Security Information and Forms.
NOTE: The usage agreement form MUST be on file before the user receives access.

*Usage Agreement:
Certify the recipient has completed Cal Poly's RUP and Confidentiality/Security agreements.

Approver Information - Individual approving access for Recipient

1. MUST be filled-in before proceeding to Step 2
2. Approver must have the role Head of Department or Higher and must be available to approve request.

Enter the Approver's Cal Poly Username (e.g; jmustang):

**Approver Username: Click Lookup Approver after entering Username:

Approver's Name:
Approver's Phone:

Enter you Approver's Cal Poly User Name. Click on Lookup Approver and the information will populate for you.
Incumbent/Person with Similar Roles Information - (Optional)
If you want/need this Recipient's roles to match the Incumbent or somebody with similar roles, please provide full name.

Incumbent/Similar Person: Enter the name of the person before you who had PeopleSoft Financials

Proceed to Step-2
1. If you are done entering all information above, select Proceed to Step-2
2. If you are not done entering all information above, select Finish which will save your work and you can reopen ticket later to finish.
<table>
<thead>
<tr>
<th>Role Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CFSSL_EU_FINANCIAL_QUERY</td>
<td>This Finance role allows Users to have view only access to Accounts Payable, Purchasing, Asset Mgmt, Receivng, General Ledger and Chart of Accounts.</td>
</tr>
<tr>
<td>CFSSL_EU_REQUESTOR</td>
<td>This Finance role allows Users to enter, but not approve, a Requisition.</td>
</tr>
<tr>
<td>CFSSL_EU_REQUESTOR_APPROVAL</td>
<td>This Finance role allows Users to enter and approve regulations for themselves and other specified users.</td>
</tr>
<tr>
<td>CFSCSU_AP_ProCard_02</td>
<td>This role is required for anyone using the Procurement card. It allows them to view charges, make changes to charts, and print their monthly ProCard statement.</td>
</tr>
<tr>
<td>CFSSL_TR_DB_FINANCE_USERS</td>
<td>This role allows Users access to the Finance Dashboard.</td>
</tr>
<tr>
<td>CFSSL_TR_DB_PAYROLL_ALL</td>
<td>This role allows Users access to the Labor Cost Dashboard and should only be granted to Users who need access to payroll information.</td>
</tr>
</tbody>
</table>