

Instructions on how to complete the electronic Request for Finance Data Access form.

The electronic form can be completed by a user requesting access or by department approver. Users requesting access can complete Section 1, 2, and 3. For department approval, section 5 is required for access to be granted. In cases where a manager is requesting access for a new employee, they can complete Sections 1, 2, 3 and 5.

Form Layout

Section 1 – User Access Information Enter information about the user requesting finance data access to GLez reports, dataND Endowment reports, or buyND.

Note: Department Approver field will route the form to obtain manager approval.

Section 2 – Finance Data Access Request - Select appropriate access (Glez reports, dataND Endowment reports, buyND).

Section 3 – Data Level Access- Enter fund and organization codes allowed for user to view in GLez reports, dataND Endowment Reports or make purchases via buyND.

Note: if more than 5 funds are required, you can upload a file with the complete list of funds, or enter the ND netID of another user that would mirror the new user access, or if assignment of broad fund type access is required complete that section. If broad access to ALL endowment funds is being requested, leave the "Organization Code" field blank and check the "Override" box.

Section 4- Data Level Access (Asset/Liability Reporting) -Enter fund and account codes if user requires access to balance sheet accounts through GLez reports.

Section 5-Department Approver will authorize the access request by entering their name and checking the Grant Access checkbox.

Section 6-Payroll Access Administrator Approval - If payroll access is required, the department approver enters the higher level approver name (Department Chair, Dean, Director or Vice-President) so that the form gets routed to them for payroll approval. The department approver will also enter the employee name so the form gets routed to the employee to acknowledge the Employee Responsible Use policy when handling confidential payroll viewing information.

At each step in the process, by hitting the submit button the workflow will route the form to the approver and then get routed to the Controller's Office Finance Data Access Team.