

LOCAL COUNCIL PEOPLESOFT FINANCIAL SECURITY REQUEST FORM

- Any request to add, change or delete a PeopleSoft Financial user must be submitted on this security access request form.
- Completed security access request forms should be submitted to the Member Care Contact Center as an incident for further processing.
- Local Council Scout Executives or designees are authorized to approve access requests.
- Please check on the following roles listed below for the USER ID.

SUBMIT COMPLETED FORM TO MEMBER CARE CONTACT CENTER

Date:		
Requestor:	Local Council #:	Phone Number/ Extension
USER LAST NAME:	USER FIRST NAME:	
Requested Action: ADD ID UPDATE ROLE INACTIVATE ID REACTIVATE ID DELETE ID <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		
<p>✓ a box <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p>		
LOCAL COUNCIL REQUEST ACCESS TO ROLES MARKED BELOW:		
ASSETS: <input type="checkbox"/> Asset Manager <input type="checkbox"/> Asset Staff BANKING: <input type="checkbox"/> Banking- Add/ Update	GENERAL LEDGER: <input type="checkbox"/> GL Staff <input type="checkbox"/> GL Manager <input type="checkbox"/> GL Journal Entry <input type="checkbox"/> GL Post access <input type="checkbox"/> Journals View Only/Upload	ACCOUNTS PAYABLE: <input type="checkbox"/> Print Checks <input type="checkbox"/> AP Manager <input type="checkbox"/> AP Staff <input type="checkbox"/> AP Inquiry <input type="checkbox"/> AP Reporting
REPORTING: <input type="checkbox"/> Query Viewer <input type="checkbox"/> GL Reports <input type="checkbox"/> Executive (non-Scout executive) <input type="checkbox"/> Field Staff <input type="checkbox"/> Auditor	PROJECTS/ TREE MANAGER: <input type="checkbox"/> GL Projects <input type="checkbox"/> Tree Manager	VENDORS: <input type="checkbox"/> Vendor Approval <input type="checkbox"/> Vendor Add/ Update
eBILL: <input type="checkbox"/> eBill Customer	SPECIAL: <input type="checkbox"/> POS Upload	SPECIAL: <input type="checkbox"/> Scout executive (restricted)
USER ID'S WILL BE PROVISIONED ONLY WITH THE ROLES MARKED ON THIS REQUEST FORM.		

APPROVALS BELOW	Signature	DATE
Local Council Scout Executive (or designee)		

Glossary of security roles in PeopleSoft

Title	Roles in PeopleSoft	Description
Assets		
Asset Manager	BSA LC AM Manager	All pages in Asset Management: Add or Transact assets, Transfer assets, retire assets, leases, group assets, administer assets, manage Asset Mgmt Business Unit
Asset Staff	BSA LC AM Staff	Add Assets, Transact, Retire, Inquiry, AM Reports etc
Banking		
Banking- Add/ Update	BSA LC Banking 01	Administer Bank reconciliation, Statement Accounting, Bank statement codes.
AP		
AP Inquiry	BSA LC AP Inquiry	Read only ability to access Voucher information and payments.
AP Manager (+ Print Checks)	BSA LC AP Manager	All AP Functions: Custom AP Pages, Delete/Post/Unpost vouchers, voucher entry and correction, Paycycle and admin processes, vendor maintenance, AP Standard processes, AP Reports, Supervisory processes, Inquiry pages etc
AP Manager NO ability to print checks	BSA LC AP Manager NO PAYCYCLE	All functions of AP Manager Role but without access to create checks.
AP Staff (+ Print Checks)	BSA LC AP Staff	Add/Modify vouchers, post/unpost vouchers & payments, AP Standard processes, Paycycle and payments processing.
AP Staff NO ability to print checks	BSA LC AP Staff NO PAYCYCLE	Same as AP Staff role but no access to print checks
AP Reporting	BSA LC AP Reporting	BSA LC AP Reporting
eBilling		
eBill Customer	BSA LC Customer	Access to eBill Customer Portal
GL		
GL Staff	BSA LC GL Staff	Access to Add/Modify JE, Review Ledgers, Run reports, Allocations, Design CF (Projects)
GL Manager	BSA LC GL Manager	Along with staff access, this role has additional access to set up locations, correct CF Projects, kick off Finance Facts interface, Update periods, Tree manager access
GL Journal Entry	BSA LC GL- Journal Entry	Basic journal entry access
GL Post access	BSA LC GL Post access	BSA LC GL Post access
Journals View Only/Upload	VIEW ONLY UPLOAD	Upload attachments to journals, View Journals
Projects / Tree Manager		
GL Projects	BSA LC GL Design CF projects	GL Projects
Tree Manager	BSA LC TREE MANAGER	Tree Manager access
Reporting		
Query Viewer	BSA LC Peoplesoft User	Basic access to view/run query
GL Reports	BSA LC GL Reports	Access to run all financial reports, nvision reports
Executive (non-Scout executive)	BSA LC Executive	Access like GL Manager, plus all reporting
Field Staff	BSA LC Field staff	Access to run all financial reports, nvision reports, access to view/run queries
Auditor	BSA LC AUDITOR	Council Auditor access to view reports, queries
Vendors		
Vendor Approval	BSA LC Vendor Approval Pages	BSA LC Vendor Approval Page
Vendor Add/ Update	BSA LC Vendors Maintenance	BSA LC Vendors Maintenance
Special		
POS Upload	POS Upload	Upload data file from Point of Sale system
Scout executive (restricted)		