Common Financial Systems (CFS)
Data Access Request Form

California State University MONTEREY BAY

User Information

Last Name: _____ First Name: _____ Work Phone: _____

Employee ID # (Not SSN): _____ Email: _____ DeptID: _____

Working Title: _____ Contact (If other than the user): _____

Business Unit(s): ☐ MB000 ☐ MB075 ☐ MB104 ☐ MBCSU ☐ MBGAP ☐ New Access ☐ Change Existing Access

Access Roles for Departments

☐ Data Warehouse/COA/Finance Inquiry
This security role provides all necessary inquiry access for department administrative users in CFS including Data Warehouse and chart of accounts (COA).

☐ ProCard
This security role provides all necessary access for CSUMB ProCard user to maintain purchasing information and update card holder transactions.

☐ Create Purchase Requisitions
This security role provides access to create purchase requisitions.

☐ Budget Transfers (MB000 only)
This security role provides access to enter budget transfer journal entries.

☐ AR/BI (MB000 only)
This security role provides inquiry access to AR/BI.

Have you completed Training?

Data Warehouse/COA	☐ Yes	☐ No
Requisition	☐ Yes	☐ No
Budget Transfers	☐ Yes	☐ No

Access Roles for Finance Service Providers (Finance Internal Use Only)

Accounting & A/P - State
☐ Accounting Director
☐ Accounting Manager
☐ GAAP Accountant
☐ GL Accountant
☐ Asset Accountant
☐ Post Journal Entries
☐ A/P Lead
☐ A/P Technician
☐ Print Checks

Accounting & A/P - Auxiliaries
☐ Accounting Management
☐ Asset Accountant
☐ Accountant
☐ Admin Integration
☐ Grants Accounting
☐ A/P Technician
☐ Print Checks

Purchasing Roles
☐ Procurement Director
☐ Buyer / Contracts Analyst
☐ Procurement Assistant
☐ Property
☐ Receiving
☐ Vendor Maintenance

Budget Roles (MB000 only)
☐ Director of Budget & Planning
☐ Lead Budget Analyst
☐ Budget Analyst

Other Roles
☐ ASM Analyst - Finance
☐ CFS Security

ASM Use Only:

Employee Signature: _____

MPP Signature: _____   Print Name: _____   Date: _____

Return Completed form to Administrative Systems Management (Mtn Hall D)

Information Security Awareness Training Completed, Confidentiality Agreement on file or attached?: ☐ Yes ☐ No   Verified By: _____

Forward form to CFS Security Analyst

CFS Security Analyst Signature: _____   Date: _____