

ConnectCarolina and Related Applications Access Request Form ***Finance***

Employee Information:			
	Name:		Phone/email:
	PID #:		ONYEN:
	Home Dept. #:		Home Dept. Name:
	Manager Name/Title:		Manager Phone/email:
ConnectCarolina Campus User Roles [select those needed]			
Grant	Revoke	Budget Transfers – Allows the user to enter, modify, and search for budget transfers. It also allows the user to delete budget transfers that have not been posted and resubmit budget transfers for approval after they have been denied.	
Grant	Revoke	Budget Journals – Allows the user to enter, modify and search for budget journals. It also allows the user to delete budget journals that haven’t been posted and to resubmit budget journals for approval after they have been denied.	
Grant	Revoke	Campus Vouchers – Allows the user to create campus vouchers for reimbursements for employees and University affiliates, independent contractor payments, cash advances, and petty cash replenishments. It also allows the user to use the Voucher Inquiry option to search for and display voucher information.	
Grant	Revoke	Creating and Changing Vendors – Allows the user to request new vendors and independent contractors, and request changes to existing vendors and independent contractors.	
Grant	Revoke	Journal Entries – Allows the user to create campus journals, correct campus journals, correct journal entries, correct voucher journal entries, and inter-unit campus journals. It also allows the user to edit campus journals that have not been posted and to delete campus journals.	
Grant	Revoke	Source Create – Allows the user to request new fund sources or request changes to fund sources. [This job function is also included in the Journal Entries role so there is no need to request this role in addition to the Journal Entries role.]	
Grant	Revoke	Managing Assets – Allows the user to enter an asset’s location, including searching for and viewing an asset, updating information, and reporting movement and status.	
Grant	Revoke	Purchase Requisitions and Receiving – Allows the user to create purchase requisitions and make changes to them before they are submitted. It allows the user to view the status of, cancel, print, and make copies of requisitions. It also allows the user to create a change order. This role also allows the user to record receipts, make changes to receipts, handle returns, and close receipts short.	
Grant	Revoke	University Deposits – Allows the user to process incoming payments at the department or school level, using direct journal deposits. Also allows the user to update a deposit and view deposits.	
Grant	Revoke	Vendor Catalog – Allows the user to place orders in the eProcurement vendor catalogs (such as Staples, Fisher Scientific). Also allows the user to view the status of the requisitions with which these orders are placed and to make changes to those requisitions.	
Grant	Revoke	AR/Billing other than OSR (only for units doing billing in ConnectCarolina) – This role is only for the small number of units who are doing billing in ConnectCarolina. Allows users to create and maintain customers and customer contacts, create online and internal bills, and adjust bills (including credits and rebills). Allows users to generate invoices with the single action invoice process. It also allows users to run inquiries to see outstanding invoices and information about customers.	
Grant	Revoke	Inquiry Roles – Gives users access to the accounts payable, purchase order, budgets and eProcurement inquiry options.	
Grant	Revoke	Vendor Catalog View Only – Allows the user to view items in the eProcurement vendor catalogs (such as Staples and Fisher Scientific) but not place orders from the catalogs. [IMPORTANT: Be sure to not request this role in addition to the Vendor Catalog role, because this role prevents checking out vendor catalog orders.]	
ConnectCarolina Central Office			
Grant	Revoke	Connect Carolina Central Office user – Please describe what access you need.	
Web Travel - Campus			
Grant	Revoke	Web Travel User - This role allows someone to access Web Travel and create Travel Documents. It also grants Approvers access to the application. Note: Anyone who has PeopleSoft Finance Administrative access, i.e. can access the PS Finance menu, is granted this role automatically and does not need to request it via this form.	

