

AIS User Form

Carbondale Campus End User Instructions

FORM - AIS User Form

Use: This form is to request or revoke access to the Administrative Information System (AIS).

Access: Access the form via the E-Forms web site (<http://www.eforms.siu.edu>), Adobe Reader 7.0 or higher must be installed on your computer.

Instructions: Complete the form using the following instructions.

Assigned by Accounting Services Section:

AIS User ID Leave blank. For Accounting Services use only.

Responsibility Request Number

Leave blank. For Accounting Services use only.

New/Existing

Leave blank. For Accounting Services use only.

Employee Information Section:

Effective Date Enter the effective date for the requested responsibilities.
(Format DD Mon YYYY)

Name Enter the name of the person requesting access (Format Last, First, Middle).

Employee ID Number Enter the employee identification number of the person requesting access. If you do not know this number, it can be found on the Fiscal Officer Certification Report. **Do not enter the user's social security number.**

Department Enter the name of the department where the person requesting access is employed.

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Mail Code Enter the mailcode of the department that the person requesting access is employed.

Phone Number Enter the phone number of the person requesting access.

E-Mail Address Enter the e-mail address of the person requesting access.

Form prepared by Enter the last name, first name, phone number, and e-mail address of the person who prepared the form. This is for contact purposes.

Purpose Section:

Request Access Select if you are requesting access for an AIS user.

Revoke Access Select if you are revoking access for an AIS user. If this option is selected indicate the reason in the "If access revoked, reason:" field.

If access revoked, reason:

If "Revoke Access" is selected choose one of the following reasons for the revocation.

- Separated from SIU
- Transfer to another Unit
- Change in Duties
- Other

Responsibility Section:

Indicate if Fiscal Officer or Delegate

Choose either Fiscal Officer or Delegate from the dropdown list and check "Request Access" or "Revoke Access".

Budget Purpose Enter the Budget Purpose number for which the Fiscal Officer/Delegate is requesting or revoking access.

Unit Enter the Unit value of each Budget Purpose number.

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General Ledger-Unit Inquiry Only

Select either "Request Access" or "Revoke Access" if the user is **NOT** a Fiscal Officer/Delegate, but needs inquiry access to a Unit or needs inquiry access removed.

Fixed Assets Managerial Inquiry

Select either "Request Access" or "Revoke Access" if the user will need access to equipment inventory.

Prepare Purchase Requisitions

Select either "Request Access" or "Revoke Access" if the user will need access to enter/prepare purchase requisitions, or have this responsibility revoked.

Department Receiver

Select either "Request Access" or "Revoke Access" if the user will be responsible for the entry of Departmental Receipts, which are required for shipments of goods that are delivered directly to the Department by the Vendor, or if you would like this responsibility revoked. Departmental Receipts are required only on transactions that are associated with purchase orders.

Department Buyer

Select either "Request Access" or "Revoke Access" if the user will be responsible for the entry/management of releases against Planned Purchase Orders and Blankets, or you would like this responsibility revoked.

List Budget Purpose(s) for Department Buyer Approvals of Scheduled Releases. (Leave blank if not authorized to approve.)

Enter the Budget Purposes for which the user is requesting or revoking access to approve scheduled releases that are entered. If the user does not have the authority to approve releases, leave this section blank.

Internal Billing Technician

Select either "Request Access" or "Revoke Access" if the user will be responsible, or needs responsibility revoked for the entry/preparation of internal billings for Service Departments.

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SIU HRMS FO Time Entry

Select "Request Access" if the department is entering time on-line through HRMS and the person requesting access is a departmental Time Keeper or responsible for entering bi-weekly time for Civil Service employees and/or Student Workers. Select "Revoke Access" if this access is to be revoked. Currently this access is restricted to certain departments.

SIU HRMS Other

Select "Request Access" or "Revoke Access" and select the correct HRMS responsibility from the drop down menu. Six responsibilities are available and must be approved by Human Resources.

- SIUC HRMS Academic Data Specialist
- SIUC HRMS Department View
- SIUC HRMS Graduate Data Specialist
- SIUC HRMS Internal Audit View Only
- SIUC HRMS NRA Specialist
- SIUC HRMS PSO View Only.

Central Units Only Section: This section is only used by the Central Units offices listed below. If you are not in one of these departments leave this area blank.

Accounting Services

Select either "Request Access" or "Revoke Access" if the user is a Accounting Services employee requesting or revoking AIS access.

List responsibilities

Enter responsibilities being requested or revoked for the Accounting Services employee.

Accounts Payable

Select either "Request Access" or "Revoke Access" if the user is an Accounts Payable employee requesting or revoking AIS access.

List responsibilities

Enter responsibilities being requested or revoked for Accounts Payable employee.

Purchasing

Select either "Request Access" or "Revoke Access" if the user is a Purchasing employee requesting or revoking AIS access.

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- List responsibilities* Enter responsibilities being requested or revoked for the Purchasing employee.
- H.R./P.O./F.A.O.* Select either "Request Access" or "Revoke Access" if the user is a Human Resources/Payroll Office/Financial Aid Office employee requesting or revoking AIS access.
- List responsibilities* Enter responsibilities being requested or revoked for the H.R.-P.O.-F.A.O. employee.
- Budget* Select either "Request Access" or "Revoke Access" if the user is a Budget Office employee requesting or revoking AIS access.
- List responsibilities* Enter responsibilities being requested or revoked for the Budget Office employee.

Employee Information Section:

- Name* Leave blank. These fields will populate from the information entered on page one.
- Employee ID Number* Leave blank. This field will populate from the information entered on page one.

Required Signatures Section:

- User Signature / Date*
Obtain user's signature and the date it was signed.
- Unit Officer Name / Phone No.*
Enter the name and phone number of the Unit Officer.
- Unit Officer Signature / Date*
Obtain the Unit Officer's signature and the date it was signed.

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Fiscal Officer Name / Phone No.

Enter the name and phone number of the Fiscal Officer.

Fiscal Officer Signature / Date

Obtain the Fiscal Officer's signature and the date it was signed.

System Administration Use Only Section:

Leave all fields of this section blank. It will be completed by the system administrator.

Responsibilities Approved and Assigned:

Leave all fields of this section blank. They will be completed by the back office once the form is complete.

Routing:

Print form, obtain all required signatures and mail completed form to:

Sandy Partridge

Accounting Services, MC 6812.

All forms must be submitted to Accounting Services. Accounting Services will route to appropriate areas.