

AIS User Form

Carbondale Campus End User Instructions FORM - AIS User Form

Use: This form is to request 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.

Enter the date the responsibilities are to become effective DD Mmm YYYY

Effective Date: _____

Enter the employee's name and employee ID Number

<u>Employee Information Section</u>				
NAME: Last	First	Middle	Employee ID Number	
Department	Mail Code	Phone Number	E-Mail Address	
Form prepared by: _____	_____	_____	_____	_____
Last Name	First Name	Phone Number	E-Mail Address	

Enter the employee's department name, mail code, phone number, and e-mail.

Enter the preparer's name, phone number, and e-mail

Purpose Section:

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

<u>Purpose</u>	
<input type="radio"/> Request Access	<input type="radio"/> Revoke Access
If access revoked, reason:	
<input type="radio"/> Separated from SIU	<input type="radio"/> Transfer to another Unit
<input type="radio"/> Change in Duties	<input type="radio"/> Other _____

Select if you are requesting access

Responsibility Section:

Indicate if Fiscal Officer or Delegate

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

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

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Unit Enter the Unit value of each Budget Purpose number.

General Ledger-Unit Inquiry Only

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

Fixed Assets Managerial Inquiry

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

Prepare Purchase Requisitions

Select "Request Access" if the user will need access to enter/prepare purchase requisitions.

Department Receiver

Select "Request 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. Departmental Receipts are required only on transactions that are associated with purchase orders.

Department Buyer

Select "Request Access" if the user will be responsible for the entry/management of releases against Planned Purchase Orders and Blankets.

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 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 "Request Access" if the user will be responsible 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. Currently this access is restricted to certain departments.

SIU HRMS Other

Select "Request 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.

List Budget Purpose and corresponding Unit value to which user will need access

Select for F.O. or delegate access to GL inquiry

Select for GL inquiry for non-delegates or F.O.s

Select for online purchase requisitions

Select for Fixed Asset inquiry

Select for access to enter merchandise on services delivered

Select for access to enter scheduled releases against planned purchase orders

Responsibility	Request Access	Revoke Access	Budget Purpose	Unit	Budget Purpose	Unit
<input type="text" value=""/> (Indicate if Fiscal Officer or Delegate)	<input type="radio"/>	<input type="radio"/>	_____	_____	_____	_____
General Ledger-Unit Inquiry Only (Non-Delegate Access)	<input type="radio"/>	<input type="radio"/>	_____	_____	_____	_____
Fixed Assets Managerial Inquiry	<input type="radio"/>	<input type="radio"/>	_____	_____	_____	_____

Attach list if additional space is required for Budget Purpose and Unit Numbers.

			List Budget Purpose(s) for Department Buyer Approvals of Scheduled Releases. (Leave blank if not authorized to approve.)
Prepare Purchase Requisitions	<input type="radio"/>	<input type="radio"/>	_____
Department Receiver	<input type="radio"/>	<input type="radio"/>	_____
Department Buyer	<input type="radio"/>	<input type="radio"/>	_____
Internal Billing Technician	<input type="radio"/>	<input type="radio"/>	_____

SIU HRMS FO Entry	<input type="radio"/>	<input type="radio"/>	
SIU HRMS Other: <input type="text" value=""/>	<input type="radio"/>	<input type="radio"/>	

Select for access to enter/prepare internal billings for service departments

Select to access other HRMS responsibilities (see explanation in the "Responsibility Section" on this form)

Select to access bi-weekly time entry

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 "Request Access" if the user is an Accounting Services employee requesting AIS access.

List responsibilities

Enter responsibilities being requested for the Accounting Services employee.

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

List responsibilities Enter responsibilities being requested for Accounts Payable employee.

Purchasing Select "Request Access" if the user is a Purchasing employee requesting AIS access.

List responsibilities Enter responsibilities being requested for the Purchasing employee.

H.R./P.O./F.A.O. Select "Request Access" if the user is a Human Resources/Payroll Office/Financial Aid Office employee requesting AIS access.

List responsibilities Enter responsibilities being requested for the H.R.-P.O.-F.A.O. employee.

Budget Select "Request Access" if the user is a Budget Office employee requesting AIS access.

List responsibilities Enter responsibilities being requested for the Budget Office employee.

Indicate user's employing department

List responsibilities needed

Central Units Only:	Request Access	Revoke Access	List responsibilities:
<input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
			<input type="text"/>
			<input type="text"/>
			<input type="text"/>

Select to request access

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.

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Required Signatures Section:

User Original Signature / Date

Obtain user's original signature and the date it was signed.

Unit Officer Name / Phone No.

Enter the name and phone number of the Unit Officer.

Unit Officer Original Signature / Date

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

Fiscal Officer Name / Phone No.

Enter the name and phone number of the Fiscal Officer.

Fiscal Officer Original Signature / Date

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

The diagram shows a form titled "Required Signatures:" with six rows of input fields. The first row is for the User, the second for the Unit Officer, the third for the Unit Officer, the fourth for the Fiscal Officer, the fifth for the Fiscal Officer, and the sixth for the Fiscal Officer. Each row has a label, a signature line with a red arrow pointing to it, and a date field. The first and third rows have a "Date:" label, while the second, fourth, and fifth rows have a "Phone No.:" label. Two callouts on the left point to the signature lines: "User's signature" points to the first row's signature line, and "Fiscal Officer's signature" points to the fifth row's signature line.

Required Signatures:		
User Original Signature:		Date: _____
Unit Officer Name:	_____	Phone No.: _____
Unit Officer Original Signature:		Date: _____
Fiscal Officer Name:	_____	Phone No.: _____
Fiscal Officer Original Signature:		Date: _____

System Administration Use Only Section:

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

Responsibilities Approved and Assigned:

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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.