

I understand that financial and employee information from any source and in any form is confidential and is available to me solely for the performance of my official duties as a Case employee. I shall protect the privacy and confidentiality of financial and employee information to which I have access and shall use it solely for the performance of my official duties. I also understand that through PeopleSoft I may have the ability to access financial and employee information outside of my unit of responsibility. I agree NOT to access financial or employee information outside my unit of responsibility, without documented authorization from the person with responsibility for that unit.

SPECIFICALLY, I AGREE THAT:

- 1. I WILL only access information I need to do my job.**
- 2. I WILL protect the privacy of financial, employee, and student information.**
- 3. I WILL keep my PeopleSoft password secret and I will not share it with anyone.**
- 4. I WILL log off any password protected applications before leaving my workstation.**
- 5. I WILL tell my supervisor if I think someone knows or is using my PeopleSoft password.**
- 6. I WILL NOT show, tell, copy, give, sell, review, change or delete any confidential information unless it is part of my job. If it is part of my job to do any of these tasks, I will follow the correct departmental procedure (such as shredding confidential papers before throwing them away).**
- 7. I WILL NOT misuse or be careless with confidential and sensitive information.**
- 8. I WILL NOT use anyone else's password to access PeopleSoft.**
- 9. I WILL NOT share any confidential or sensitive information even if I am no longer a Case employee.**
- 10. I AM RESPONSIBLE for any access using my PeopleSoft password.**
- 11. I AM RESPONSIBLE for my use or misuse of confidential information.**
- 12. I AM RESPONSIBLE for my failure to protect my PeopleSoft password or access to confidential information.**
- 13. I KNOW that my access to confidential information may be audited.**
- 14. I KNOW that confidential information I learn on the job does not belong to me.**
- 15. I KNOW that Case may take away my access to PeopleSoft at any time.**
- 16. I WILL tell my supervisor if I think someone else is violating this agreement.**

Failure to comply with this agreement will result in disciplinary action regarding my employment at Case and/or civil or criminal legal penalties. By signing this, I agree that I have read, understand and will comply with this agreement.

Signature: _____

Print Full Name: _____

Date: _____

Add Change Delete

Name: _____ Phone Number: _____
 Title: _____ Fax Number: _____
 Case Network ID: _____ Building: _____
 Department ID: _____ Room Number: _____
 School: _____ Supervisor (name): _____
 Supervisor's Case Network ID: _____

Purchasing / eProcurement

Submit Requisitions Approve Requisitions – \$0 - \$5,000
 Inquire on Requisitions Approve Requisitions – \$5,000 - \$20,000
 Inquire on Purchase Orders Approve Requisitions – greater than \$20,000
 Requisition Approver (name): _____
 Requisition Approver's Case Network ID: _____

Accounts Payable

Submit Check Requests
 Approve Check Requests
 Inquire on Vouchers
 Inquire on Payments

General Ledger

Enter Journals
 Approve Grants Journals
 Departmental Deposits only

User signature (required - please sign within box)

_____ Date

Authorizing Signatures

Supervisor _____

Management Center _____

Printed Name

Printed Name

Top Section

Name: As it appears in the Case directory

Phone Number: Your phone number

Title: Functional job title – the title on your business card

Fax Number: Your fax number

Case Network ID: Formerly CWRU.net ID (everything before the @ in your Case email address)

Building: When you create a requisition the default ship to address will reference this building.

Department ID: Enter the six-digit code which represents the Department in which your salary is based. If you don't know your six-digit code, follow this link to the SpeedType Lookup:

<http://www.case.edu/projects/erp/speedtype/>

Enter your seven-digit FMS Operating Account Number (for example, 2411221). The page will return your new PeopleSoft 8.4 SpeedType. For operating accounts this will be OPRXXXXXX where XXXXXX is your new Department #.

Room Number: When you create a requisition the default ship to address will include this room number.

School: Arts and Sciences (A&S), Engineering (CSE), Dentistry (DEN), Law (LAW), Medicine (MED), Management (MGT), Nursing (NUR), MSASS (SAS), or University General (UGN)

Supervisor: The name of your supervisor

Supervisor's Case Network ID: Your Supervisor's Case Network ID



Purchasing / eProcurement Section

Submit Requisitions: If your job requires that you submit PeopleSoft Electronic Requisitions, please check this box. If not, leave it blank.

Inquire on Requisitions: If your job requires that you view PeopleSoft Electronic Requisitions that were entered by you or by other users, please check this box. If not, leave it blank.

Inquire on Purchase Orders: If your job requires that you view PeopleSoft Purchase orders, please check this box. If not, leave it blank.

Approve Requisitions - \$0 - \$5,000: If you are authorized to approve Requisitions up to \$5000, please check this box. If not, leave it blank.

Approve Requisitions - \$5,000 - \$20,000: If you are authorized to approve Requisitions up to \$20,000, please check this box. If not, leave it blank.

Approve Requisitions – greater than \$20,000: If you are authorized to approve Requisitions over \$20,000, please check this box. If not, leave it blank.

Requisition Approver (name): If applicable, enter the name of the person that will approve your requisitions after you have entered them into PeopleSoft. (Please note that all requisitions exceeding your approval authority will be routed to this person first.)

Requisition Approver Case Network ID: If applicable, enter the Case Network ID of the person above.

Accounts Payable Section

Submit Check Requests: If your job requires that you submit PeopleSoft Check Requests, please check this box. If not, leave it blank.

Approve Check requests: If your job requires that you approve hard copy Check Requests, please check this box. If not, leave it blank. This box will not affect your PeopleSoft online security. It will be used by Accounts Payable to verify that the signatures on the hard copies of the Check Requests are consistent with approval authority.

Inquire on Vouchers: If your job requires that you view PeopleSoft Payment Vouchers that were entered by you or by other users, please check this box. If not, leave it blank.

Inquire on Payments: If your job requires that you view PeopleSoft accounts payable payments, please check this box. If not, leave it blank.

General Ledger Section:

Enter Journals: If your job requires that you enter PeopleSoft Non-Salary Journals either online or through the Excel interface, please check this box. If not, leave it blank.

Approve Grants Journals: All Non-Salary Journals which reference a Sponsored Project (Grant or Contract) must be approved by the Grants Accounting office in the Controller's Office. In addition, some schools require additional approvals within the school prior to the central approval. If you approve Non-Salary Journals in your school, please check this box. If not, leave it blank.

Authorizing Signatures Section:

Supervisor: The immediate supervisor of the PeopleSoft user must sign this form and print their name.

Management Center: The finance director or their designee must sign each PeopleSoft user form for users based in their school.



Top Section

Name: As it appears in the Case directory

Case Network ID: Formerly CWRUnet ID (everything before the @ in your Case email address)

'Access by:' Section

In this section you indicate whether your access to PeopleSoft data will be based on one or more departments or one or more projects or both. Users whose access is based solely on department will check that box only. Users whose access is solely based on projects will check that box only. Users whose access is based on a combination of departments and projects will check both boxes.

Section A

Enter your 6-digit Department ID: Enter the six-digit code which represents the Department that you want to access for reports and inquiries. If you don't know your six-digit code, follow this link to the Speed Type Lookup:

<http://www.case.edu/projects/erp/speedtype/>

Enter your seven-digit FMS Operating Account Number (for example 2411221). The page will return your new PeopleSoft 8.4 Speed Type. For operating accounts this will be OPRXXXXXX where XXXXXX is your new Department ID.

Rollup: If your access should be to the Department above plus any other departments which roll up to that department, please check this box. If not, leave it blank. For example, if you are the finance director of a school and the department you entered above is the dean's office, then by placing a Y in this box you will receive access to all of the departments in the school (since they all roll up to the dean's office).

Access operating and instructional funds only: By checking this box, your access will be limited to operating and instructional SpeedTypes within the specified department(s). If you need access to all Speed Types in your department(s), leave this box blank.

Access all projects that rollup to this department: By checking this box, your access will be limited to all projects within the specified department(s). If you need access to all Speed Types in your department(s), leave this box blank.

Access to specific projects within this department: By checking this box, your access will be limited to the projects which you specify below in Section B, within the specified department(s).

Section B

In this section you can specify either a list of projects and / or project ranges. If you have specified a department in Section A, your access will be limited to the projects which reside in the department(s) you have specified.

For example, in Section A you indicated Department 261221. In this section you specify a project range of RES000000 to RES999999 and checked the Access box, the user would have access to all research project SpeedTypes in Department 261221.

Please note that if the same entry was made in Section B without recording a department in Section A, the user would be granted access to all research project SpeedTypes across all departments.

Some of the more common SpeedType prefixes include:

- RES – Research Grants
- TRN – Training Grants
- SPC – Special Programs
- OSA – Other Sponsored Activity
- END – Endowment Funds
- FHB – Funds Held in Trust by Others
- CIP – Construction in Progress
- AGY – Agency Funds

By checking either the Access or Deny boxes, you can use either inclusive or exclusive logic to indicate the SpeedTypes a user can access.

Authorizing Signatures Section

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CASE WESTERN RESERVE
UNIVERSITY EST. 1826

Please Return Completed Forms to:

PeopleSoft Security Administrator
Crawford Hall, Room 532
Location Code: 7052