KFS Access Requests

- Procedures for requesting access to KFS and Dashboards:

All requests must come from an approved Authorizer, listed below.

- KFS Access Requests:
  - Requests for access should include the name and netid of person requesting access, and all roles being requested (see list of roles below).
  - Request should be sent to kfs-security@cornell.edu **Please note each email sent creates a new Remedy ticket, if responding to a ticket please be sure the INC number is in the email subject**
  - If the request includes access to labor data, either in KFS or in the dashboards, orgs for which access should be granted need to be included.
  - The KFS role: KDW Staff Accounting provides access to Financial and Web Fin 2 dashboards developed for this role. KDW Staff Labor provides access to the Labor Activity dashboard.
  - PI and AM roles are derived roles from KFS. Individuals with these roles see the following dashboards: Account, Account-Award Portfolio and Web Fin 2.

- OBIEE Answers and Special Dashboard requests:
  - Requests for access should include the name and netid of person requesting access, and all roles being requested
  - Request should be sent to kfs-idr@cornell.edu

- OBIEE Act As Proxies:
  - Requests for access are generated from the Financial Data Access Dashboard, OBIEE Act As Proxy Access Page via the Request Modifications to Act As Proxy Access at the bottom of the page.

KFS, KDW and OBIEE Permissions can be viewed on the Data Access and Annual Certification Dashboard by Organization or Netid.

Sample Request:

Please give Sarah Christen, sjc37, access to KFS-User, Staff Accounting dashboard and Staff Labor dashboard for org 0100.

* Procedures for removing access to KFS and Dashboards:*

* It is the responsibility of the college/unit Authorizer to request access removal when a person's access is no longer needed.

  - Please send a request to kfs-security@cornell.edu include name, net id and all roles requesting access removal

Anyone can request a primary department code be filled in for a user; as that is a data field needed for certain transactions but does not grant any access.

Approved Authorizers by Financial Transaction Center

<table>
<thead>
<tr>
<th>Primary Authorizer</th>
<th>Secondary Authorizers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arts &amp; Sciences</td>
<td>Diane West (dw68)</td>
</tr>
<tr>
<td></td>
<td>Maureen Quartararo (mfq1)</td>
</tr>
<tr>
<td></td>
<td>Jolene Layton (jml523)</td>
</tr>
<tr>
<td>CALS/CHE Financial Transaction Center</td>
<td>eshop access: Sherry Thompson sld8 (CALS &amp; CHE)</td>
</tr>
<tr>
<td></td>
<td>KFS Application &amp; Dashboards: Michelle Lyon (CHE), mh30 Mark Pluchino map86 (CALS) Dianna Burger dhb226 (CALS)</td>
</tr>
<tr>
<td></td>
<td>Jennifer Austin</td>
</tr>
<tr>
<td>Extension</td>
<td>Sarah Dayton sfd3</td>
</tr>
<tr>
<td>Department</td>
<td>Contact Person(s)</td>
</tr>
<tr>
<td>------------------------------------</td>
<td>------------------------------------------</td>
</tr>
</tbody>
</table>
| COE/CIS Financial Transaction Center | Lisa Tvaroha                              | George Taylor for COE and CIS  
Christine Day for CoE and CIS  
eshop access  
Pat Musa for CIS  
Heather Parente (hld25) for CoE  
Michael Weissman(mbw76) - NYC Tech Campus |
| College of Business and Statler Hotel | Travis Virgadamo (tjv9)                 | Rebecca Sellen(rss32)  
Tivadar Szegletes(tjs33) |
| WMC (Weill Medical)*               | Amee Patel app34                          |                                                                                        |
| Research Division                  | Mike Barbato                              |                                                                                        |
| Student & Academic Services        | Sharon Baum                               | Johnathan Hart – jgh27  
Linda Charles-lc88  
Catherine Steding-cks93 |
| University Business Service Center | Sandy Swaezeys sls22  
Kim Tilton kmt1 | For Labor Only:  
Library-3700: Ken Putnam krp5, Susan Bristol scb5  
ILR-0500: Cindy Hayes ceh19  
AAP-2000: Melinda Stelick ms294  
Law School-2500: Christina Dovi (cjd88) |
| Veterinary Medicine                | Susan Schattschneider                     | Mike Piston msp35                                                                 |
| DFA/Central                        | Cathy Salino, Dan Dwyer                   |                                                                                        |
|                                    |                                        |                                                                                        |
|                                    | Nancy Preston                             |                                                                                        |
|                                    | Heidi Honor                               | Davina Desnoes                                                                      |
| Bursar                             | Ed Baker                                  | Cindy Morehouse                                                                     |
| Cost & Capital Assets              | Jeff Silber                               | Nancy Abbott                                                                       |
| Sponsored Financial Services (Contracts & Grants) | Jeff Silber | Janet Strait, Michelle Bollock-Smith, Dave Sandoval                              |
| DFA Financial Systems & Reporting (FSAID) | Dan Dwyer | Kris Alise                                                                        |
| General Accounting                 | Erica Jessup                              |                                                                                        |
| Payroll                            | Leora Snowberger                          | Amy Beckhorn                                                                       |
| Procurement and Payment Services   | Tom Romantic, Karen Emley                 |                                                                                        |
| Treasurer/Cash Management          | Michelle Benedict Jones                   |                                                                                        |
| Weill Medical College              | Amee Patel                                |                                                                                        |

**University Wide Access Roles and Authorizers:**

<table>
<thead>
<tr>
<th>Role</th>
<th>Authorizer</th>
</tr>
</thead>
<tbody>
<tr>
<td>KDW Staff Labor (role 3000015)</td>
<td>Dan Dwyer, Kris Alise</td>
</tr>
</tbody>
</table>
Distributed Role Descriptions:

KFS Application

- **Account Delegate Global Initiator (cu)** role 1000000187: Allows users to initiate the Account Delegate Global (GDLG) and the Account Delegate Model (GDM) functionalities.
- **Account Reversion Initiator (cu)** role 1000000282: Allows users to initiate the Account Reversion (ACCR) and the Global Account Reversion (GARV) functionalities.
- **Campus Viewer (cu)** role 100000453: Grants access to users to view FP edocs, PURAP edocs and gives the ability to look up values, grants view access only no initiate permissions.
- **Confidential attachment viewer (cu)** role 100000502: Grants access to view confidential attachments.
- **Contracts & Grants Project Director** role 40: Allows users to serve as a project director. Needs to be approved by one of the central authorizers: Jeff Silber, Janet Strait, Michelle Bollock-Smith.
- **CU Bank Selector** role 10011: Users in this role can edit the bank code information on the Advance Deposit and Non-check Disbursement documents.
- **CU Vendor Initiator** role 10009: This role allows users to initiate vendor transactions. This role should be granted by the access authorizer using the Kuali Security Request (KSR).
- **e-SHOP User** role 100000002: This role has a $1,500 APO limit and grants the permission to initiate, edit and accept assignment of carts in e-SHOP. This role should be requested for users who initiate e-SHOP transactions or any user who would be assigned a cart from another e-SHOP user to complete in KFS. This role should be granted by the access authorizer using the Kuali Security Request (KSR).
- **e-SHOP Plus User (cu)** role 100000358: This role grants access with a $5,000 APO limit. This role grants the permission to initiate, edit and accept assignment of carts in e-SHOP. NOTE: For this role to be granted, the e-SHOP Plus User Role Criteria must be met and approved by the FTC/BSC Director via the eShop Criteria.
- **e-SHOP Shopper Office (cu)** role 10000422: This role allows users to limit their e-SHOP catalogs to the Office supply vendors only. NOTE: You can have more than one view.
- **e-SHOP Shopper Lab (cu)** role 10000423: This role allows users to limit their e-SHOP catalogs to the Lab supply vendors only. NOTE: You can have more than one view.
- **e-SHOP Shopper Facilities (cu)** role 10000442: This role allows users to limit their e-SHOP catalogs to the Facilities supply vendors only. NOTE: You can have more than one view.
- **Favorite Account Manager** role 100000353: This role allows users to create and administer favorite accounts on behalf of others.
- **FP Limited Doc Attacher (cu)** role 100000166: This role allows non-kfs users to attach documents to the DV and the PCDO docs.
- **FTC/BSC Members** role 10000157: This role is limited to FTC/BSC members. It includes the ability to use additional Chart of Accounts functionality (global account, global account delegate, account delegate, account delegate model, account reversion and global account reversion), as well as initiate Disbursement Voucher, Vendor e-docs, Requisitions, PO Void, PO Amendment, and PO Close.
- **Non-Check Disbursement Initiator (cu)** role 10000006: Allows users to initiate non-check disbursement edocs.
- **KFS-CAM Processor** role 6: Users who can use the Organization Salary Setting, import/export payrate and unlock options on the Budget Construction Document. This role also grants access to the Budget Construction dashboard. Requests for this role must include an ORG code. **All Requests for the BC Processor role must have authorization from Rose Wright, Davina Desnoes or Megan Keene**. Budget is now created via Longview-Budget System.
- **KFS-CAM Processor role 6**: Users who can initiate CAM transactional and maintenance documents, create new records using the asset document, maintain asset locations and modify accounting lines on invoice document. This role needs to be assigned a hierarchical ORG qualifier. **** NEW Update!! Also need to request role 10000473 Retire Multiple Asset User (cu). This will allow CAM Processor to retire multiple assets.****
- **KFS User [KFS-SYS User]** role 54: The KFS-User role will be given to individuals with financial transaction responsibilities. This role gives users access to initiate the majority of financial processing e-docs, common maintenance e-docs (including account), as well as most purchasing e-docs.
- **KSR Authorizers**: approvers of KSR edocs.
- **Salary Transfer Initiator (CU)** role 10005: Users in this role can initiate the salary expense transfer e-doc and view labor inquiries within the KFS screens. Access to labor data in this role is restricted by organization. **Note**: All requests for access to this role must include the KFS org code(s) to which access is required. You MUST ensure that every organization in your entire org tree has at least one person with access, so that there are no gaps in your salary transfer coverage. Also, make sure that staff that initiate salary transfers, and need to see that information via the Dashboards, have corresponding org assignments. Payroll plans to communicate with staff who currently initiate Account Distribution Adjustment Forms (ADAF’s) to encourage them to contact their campus liaisons, through their supervisors, to make sure that their ability to perform this business function is not interrupted.
KFS Dashboards

For Central University Office Access (People who work in DFA or those who need university wide access to Labor) requests for KDW Staff accounting and/or KDW labor should be sent to KFS-IDR@cornell.edu for initial approval. For Campus requests, please send requests directly to KFS-Security@cornell.edu

- **KDW Staff Accounting role 3000014**: This role will allow users to see all accounts in the Financial dashboard and the Sponsored dashboard. No labor data will be displayed with this role.

- **KDW Staff Labor role 3000015**: This role gives users access to see the Labor dashboard and is limited by organization. When requesting this role, you must specify to which org/orgs access should be granted. **Note: If University wide access to Labor reporting is required, DFA Financial Reporting authorizers listed above will need to approve the request.**

- **KDW Local Distributed Authorizer role 100000295**: This role is for users that will grant local access within KDW. An ORG code needs to be included with this request and please note if descends hierarchy should be yes or no-if a user is already a KFS Distributed Authorizer (100000198) they do not need to be added to both roles.

- **Principal Investigator/Account Manager role**: This role gives access to the Financial dashboard, the Sponsored dashboard and the Labor dashboard with rows limited to accounts associated with the account manager and project director fields. This role is automatically assigned based on data entered in the Account Document and Award Document in KFS.

- **KFS Accounting Answers**: This role needs to be approved by DFA and the ID&R team. Requests should be sent to KFS-IDR@cornell.edu for this role.

Reference Documents

- Financial Data Stewardship Implementation Guide