

# CMS Finance Security Roles

	Conversion Mapping	Req Entry	Req Approval	Budget Transfer Entry	Baseline Transfer	Budget Approval	Commitment Entry	Dept Reports				Division Ad-Hoc Reports	Approve the-Fact Justifications
			(**has Fiscal Authority)		One-time Approval	Baseline Approval		Security	Commitment	Budget	Encumbrances/ Expenses		
Dept User (role 1)	✓	✓		✓			✓	✓					
Dept User (role 2)	✓	✓					✓	✓					
Custom Role (role 3) *** TBD	✓												
Dept Responsible Person (Chair / Director) (role 4)	✓		✓				✓	✓					
College/Unit Financial Manager (role 5)	✓	✓	✓	✓	✓		✓	✓				✓	
College/Unit Head (Dean, AVP, Assoc/Asst Dean) (role 6)	✓	✓	✓	✓	✓			✓				✓	
Division Financial Manager / Division Head (role 7)	✓	✓	✓	✓	✓	✓	✓	✓				✓	✓
Future Role (TBD)													
Delegated Approver (MPP?)	✓	✓	✓				✓	✓					

- \*\* Fiscal Authority - individual authorized to do the following:
- Approve Requisitions
  - Approve payment of invoices
  - Approve Direct Expense Check Requests
  - Approve Account Corrections
  - Approve Travel Authorizations (at their level)
  - Approve Change Orders
  - Approve Travel Claims on Approved Travel Authorizations

\*\*\* Requires Division Head (or official designee) approval



**California State University, Fullerton  
Common Management System (CMS)  
Finance Access Request Form**



**Employee Information**

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_  
 Campus Wide ID: \_\_\_\_\_ Campus E-mail: \_\_\_\_\_  
[CWID Lookup](#)  
 Department Name: \_\_\_\_\_ Campus Extension: \_\_\_\_\_  
 Permanent Temporary If Temporary, List Appointment End Date: \_\_\_\_\_  
 Faculty Staff Management Student Contractor or non-CSUF employee

**Account Action Request (check all that apply)** New Modify Disable

Reason for access: Primary Dept User Backup Dept User Other (state reason)

Please select the necessary role(s) below. **Note:** *the corresponding CMS distributed roles will be selected automatically.*

- Dept User (role 1)      Dept User (role 2)      Custom Role (role 3) \*Requires Division Finance Manager approval  
 Dept Responsible Person (Chair/Director) (role 4)      College/Unit Financial Manager (role 5)  
 College/Unit Head (Dean, AVP, Assoc/Asst Dean) (role 6)      Division Financial Manager (role 7)

**Finance Distributed Roles**

- |   |   |
|---|---|
| Requisition Data Entry (FUL_FREQ_ENTRY)     | Commitment Entry (FUL_FCOM_ENTRY)                       |
| Requisition Inquiry (FUL_FREQ_INQUIRY)      | FRS to CMS Conversion Mapping (FUL_FGL_CNV_MAPPING)     |
| Requisition Approval (FUL_FREQ_APPROVAL)    | Encumbrance/Expenditure Reports (FUL_FDR_FILENET_EXP)   |
| Budget Transfer Data Entry (FUL_FBD_ENTRY)  | Budget Allocation/Transfer Reports (FUL_FDR_FILENET_BD) |
| Budget Transfer Inquiry (FUL_FBD_INQUIRY)   | Open Commitment Reports (FUL_FDR_FILENET_COM)           |
| Budget Transfer Approval (FUL_FBD_APPROVAL) | Security Report (FUL_FDR_FILENET_SEC)                   |

Entire Division Access <a href="#">Click here</a> for list List Division to which user is requesting access  Entire College / Sub-Division Access <a href="#">Click here</a> for list List College to which user is requesting access	Department Access <a href="#">Click here</a> for list List <u>all</u> DeptID(s) or nodes to which user is requesting access  List campus location where items purchased are to be delivered (e.g. CP 800)
---	---

**Requisition Approvers**

**Budget Approvers**

Approver Name	Approver Role
	Primary Alternate
	Primary Alternate
	Primary Alternate
	Primary Alternate
	Primary Alternate
	Primary Alternate
	Primary Alternate

Approver Name	Approver Role
	Primary Alternate
	Primary Alternate
	Primary Alternate
	Primary Alternate
	Primary Alternate
	Primary Alternate
	Primary Alternate

Please enter the name of each approver and indicate if the approver is the primary approver or an alternate approver.

Please enter the name of each approver and indicate if the approver is the primary approver or an alternate approver.

**Note:** There can only be one primary approver per preparer

**Note:** There can only be one primary approver per preparer



**California State University, Fullerton  
Common Management System (CMS)  
Finance Access Request Form**



<b>CMS Core/Central Roles</b>	
Accounts Payable	General Ledger
Asset Management	Purchasing
Billing and Receivables	Other
Budget	Other

I certify that I have read, understood and agree to follow the Access and Compliance form which I signed when I was hired.

Employee Signature	_____	Date	_____
Employee Supervisor / Department	_____	Date	_____
Chair Signature	_____	Date	_____
Division Finance Manager's Signature	_____	Date	_____
<i>*Role 3 only</i>			
Dean / AVP / Division Head / Designee Signature	_____	Date	_____

Custodian of Record Signature	_____	Date	_____
Information Security Officer Signature	_____	Date	_____

<b>For CMS Use Only</b>			
CMS Finance Business Analyst Approval (for core/central requests)	Date		Distribution List LearnerWeb Register Email Master File CMS Finance tab