Follow these steps to complete the Café Systems Express Access Form. For access not indicated by the roles below, use the General Security Access Form instead.

1. Enter **Applicant Information**
   - Select checkboxes (as applicable): New User, Transfer, Inactivate
   - Enter Date, NetID, Name, EMPLID (employee ID number), title, department name, email, and phone number.
   - **Optional: Model an existing user’s access** – this option will copy the other user’s access exactly for items in each section. Any existing access will be replaced with this new security.

2. Select **NUFinancials** checkboxes (as applicable):

   **Select only one of the following:**
   - **Expenses Entry and iBuyNU Shopper** – Enter and view expense reports, advances, and travel authorizations for yourself. Shop iBuyNU and assign your cart(s) to a Requester.
   - **Expense Entry, Requester and GL Journals** – Enter and view expense reports, advances, and travel authorizations for yourself or for other individuals for whom you have proxy access. Create and view requisitions for any chart string. Access iBuyNU via NUFinancials to create catalog orders and pick up carts assigned to you by Shoppers. Modify and receive your own orders. Enter Ship To Code (Find Ship To Code). Create and edit Online Vouchers (Direct Payment Requests, Visitor Expense Reports, and Contracted Services Forms). Create revenue and expense GL adjustment entries via the actuals journal portal. Also permits access to GL inquiry pages.

   **Select from the following:**
   - **Budget Journal Entry** – Create revenue and expense budget adjustment entries via the budget journal portal.
   - **CRT Entry** – Enter and inquire on deposits.
   - **CRT Inquiry** – View only access to deposits.

   **Sponsored Accts (NUFinancials):**
   - **Post Award Inquiry** - Inquiry into profile data for award, project, activity, and contract. Inquiry into billing and information. Inquiry to professionals, sponsors, institution, departments, and sub-recipients configuration subject to row-level security.
   - **Post Award – AR Inquiry View** - Inquiry into Accounts Receivable (AR) data for sponsored projects.
3. Select **Cognos Report Access** checkboxes (as applicable):
   Access to Monthly Financials & Supply Chain folders is included with any selections below.
   - **Budget/COA** – Capital project, budget detail, chart field mapping and job cost reports
   - **Sponsored Program Management** – Financial and management reports for sponsored projects
   - **Salary Access** – Provides the ability to view payroll detail by employee for all departments and projects where row level security has been indicated.
   - **Ad Hoc Query Viewer** – Provides the ability to run reports created by Ad Hoc Query Authors
   or
   - **Ad Hoc Query Author** – Ad Hoc Query Viewer plus Access to Query Studio to create, build, and save reports. Includes Ad Hoc Query Viewer capabilities

4. Select **Approval** checkboxes (as applicable):
   - **Workflow** – Specify an Approval Level for Expenses, Requisitions, Online Vouchers, and Journals. See Workflow to specify departments or projects on page 2 of the form.
   - Special Approvals:
     - **Budget Journals** – provides the ability to approve budget journals of any amount for the department you specify. See Workflow to specify departments or projects on page 2 of the form.
     - **Project Pre–Approval** – for project level approvers who approve transactions before the department approvers.

5. Select **Additional Café Systems Access** checkboxes (as applicable).

   **FAMIS (facilities requests)** Select only one of the following:
   - **Self Service** – Create and inquire on Facilities Management self–service requests.
   or
   - **Community Assistant** – for University Housing users only

   **Sponsored Accounts (InfoEd):**
   - **Department Administrator** – Enter Dept. Tree Node (Trees are structures in NUFinances that define various roll–ups by using levels and nodes (Dept. Tree Mapping) or Dept. ID.
   - **Investigator w/ Management** – for Principal Investigators (PI) to manage their proposals
   - **Genius Administrator** – edit P.I. profiles (within your tree node) in the Genius database
   - **Cognos: Reporting** – InfoEd Report Access
   - **Delegate(s)** – For personnel that will act as delegates for specific faculty but not an entire department (Project Coordinators and Post Docs Only). See Delegates on page 2 of the form. Indicate the names & NetIDs of all faculty whose proposals you require access.
6. **Workflow** (page 2) – Workflow approval provides the ability to approve expense reports, requisitions, online vouchers, and journals for the specified department or project. Specify only one chart string value on each line – Tree Node or DeptID or Project ID:
   - **Tree Node** – (Trees are structures in NUFinancials that define various roll-ups by using levels and nodes) used to grant access for multiple departments (Dept. Tree Mapping) and/or
   - **Dept ID** – Department access automatically grants access to all projects owned by those departments.
   - **Project ID** – Only indicate projects that are not owned by the departments where you are requesting access.

7. **Row Level Security** (page 2) – Row Level Security indicates the chartstrings you may access. Specify only one chart string value on each line – Tree Node or DeptID or Project ID. Do not enter full chart string combos as access is only granted to the last chart string value. (ex: 171-1234567-10011111 – access is granted for Project ID 10111111, not DeptID 1234567)
   - **Tree Node** – (Trees are structures in NUFinancials that define various roll-ups by using levels and nodes) used to grant access for multiple departments (Dept. Tree Mapping) and/or
   - **Dept ID** – Department access automatically grants access to all projects owned by those departments.
   - **Project ID** – Only indicate projects that are not owned by the departments where you are requesting access.

8. Print the completed form (2 pages) and gather Required Signatures on both pages.

9. Send the printed and signed form via one of the following methods:
   - Scanned via email: cafesecurity@northwestern.edu
   - Fax to 847-467-3070
   - Campus Mail: Café Security, Financial Operations IT, 619 CLARK #118, Evanston Campus 1116