

## CUNYfirst Production CRM User Access Request Form

**Please Note:** This is a required form to gain access to the PeopleSoft system, and must be requested by the employee's manager. No employee may request access for themselves. For transferring employees, a separate form must be completed from the Campus and/or Department transferring FROM and TO in order to modify access in both areas. This request must be made in advance of the Effective Date of the personnel action.

### EMPLOYEE INFORMATION SECTION (Please Print):

Last Name:	First Name:	
CUNYfirst EMPL ID or Username:	Job Title:	
Business Unit / Campus:	Dept / Office:	
CUNY email address:	Work Phone:	Ext:
<input type="checkbox"/> Full time <input type="checkbox"/> Part time – {Please see: <a href="http://security.cuny.edu">http://security.cuny.edu</a> > Security Policies & Procedures > IT Procedures – General (section 3); If applicable, the Non-Public University Data Access Waiver must be submitted and approved separately to CIS Security and prior to requesting access to CUNYfirst Production}		
<b>CONFIDENTIALITY STATEMENT (Must be signed by the Employee):</b>		
I understand that the data obtained from any CUNYfirst system is to be considered confidential and NOT to be shared with anyone who is not authorized to receive such data.		
I understand that I am individually accountable for the use of my User ID in the CUNYfirst system. Improper use of my User ID could lead to revocation of access rights and further disciplinary proceedings in accordance with CUNY policies, rules and regulations, and applicable collective bargaining agreements.		
Employee's Signature:		Date:

**\*CRM Access is for help desk and support staff that will review and resolves cases; access is restricted for this purpose only\***

### TO BE COMPLETED BY REQUESTING MANAGER

<b>1. Action requested</b> (check only one): <input type="checkbox"/> Add Access <input type="checkbox"/> Revise Existing Access <input type="checkbox"/> Disable Access	<b>2. Role requested</b> (check only one): <input type="checkbox"/> Support Analyst ( <i>i.e. Help Desk staff, Super Users, Prod Support</i> ) <input type="checkbox"/> Help Desk Manager ( <i>For Managers of Help Desks only</i> )
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### 3. This section is for \*College Employees only - Select CRM Provider Group

- Add – check the appropriate \*\*Provider Group for which the Employee will support and be assigned CRM cases for resolution.
- Delete – check to remove Employee from a provider group.

Add	Delete	Provider Group	Add	Delete	Provider Group
<input type="checkbox"/>	<input type="checkbox"/>	Admissions	<input type="checkbox"/>	<input type="checkbox"/>	Help Desk (College Help Desk staff only)
<input type="checkbox"/>	<input type="checkbox"/>	Blackboard	<input type="checkbox"/>	<input type="checkbox"/>	IT
<input type="checkbox"/>	<input type="checkbox"/>	Bursar	<input type="checkbox"/>	<input type="checkbox"/>	Procurement
<input type="checkbox"/>	<input type="checkbox"/>	Faculty Workload	<input type="checkbox"/>	<input type="checkbox"/>	Registrar
<input type="checkbox"/>	<input type="checkbox"/>	Financial Aid	<input type="checkbox"/>	<input type="checkbox"/>	Security (ASL's only)
<input type="checkbox"/>	<input type="checkbox"/>	HCM			

**\*Colleges:** Please **ESCALATE** completed request to CIS. CRM access is **NOT** processed by college ASL's.

**\*\*Please do not check multiple groups unless the employee will support & resolve cases for the selected group. Email notification of Case assignment is sent to the group or assignee. As a note, CRM access allows visibility to all cases within the employee's Business Unit.**

**4. This section is for CIS Central Office Employees ONLY – Select CRM Provider Group**

- Add – check the \*\*Provider Group for which the Employee will **support** and be **assigned** CRM cases for resolution.
- Delete – check to remove Employee from provider group.

Add	Delete	Provider Group	Add	Delete	Provider Group
<input type="checkbox"/>	<input type="checkbox"/>	ALM	<input type="checkbox"/>	<input type="checkbox"/>	LDAP
<input type="checkbox"/>	<input type="checkbox"/>	ASL	<input type="checkbox"/>	<input type="checkbox"/>	Network
<input type="checkbox"/>	<input type="checkbox"/>	App Dev Team	<input type="checkbox"/>	<input type="checkbox"/>	OAM
<input type="checkbox"/>	<input type="checkbox"/>	Blackboard	<input type="checkbox"/>	<input type="checkbox"/>	OHRM
<input type="checkbox"/>	<input type="checkbox"/>	C5 / Change Control	<input type="checkbox"/>	<input type="checkbox"/>	OHRM - BADR
<input type="checkbox"/>	<input type="checkbox"/>	CRM	<input type="checkbox"/>	<input type="checkbox"/>	OIRA - Testing
<input type="checkbox"/>	<input type="checkbox"/>	CS	<input type="checkbox"/>	<input type="checkbox"/>	Oracle ESAS
<input type="checkbox"/>	<input type="checkbox"/>	CS Implementation	<input type="checkbox"/>	<input type="checkbox"/>	Oracle Functional Team
<input type="checkbox"/>	<input type="checkbox"/>	CUNYfirst Operations	<input type="checkbox"/>	<input type="checkbox"/>	Oracle Hosting
<input type="checkbox"/>	<input type="checkbox"/>	Degreeworks	<input type="checkbox"/>	<input type="checkbox"/>	Oracle Tech Team
<input type="checkbox"/>	<input type="checkbox"/>	ELM	<input type="checkbox"/>	<input type="checkbox"/>	OUR
<input type="checkbox"/>	<input type="checkbox"/>	EPM	<input type="checkbox"/>	<input type="checkbox"/>	Planning & Budget
<input type="checkbox"/>	<input type="checkbox"/>	FACTS	<input type="checkbox"/>	<input type="checkbox"/>	PMO
<input type="checkbox"/>	<input type="checkbox"/>	FIN Implementation	<input type="checkbox"/>	<input type="checkbox"/>	Portal
<input type="checkbox"/>	<input type="checkbox"/>	Financial Aid	<input type="checkbox"/>	<input type="checkbox"/>	Procurement
<input type="checkbox"/>	<input type="checkbox"/>	Financials	<input type="checkbox"/>	<input type="checkbox"/>	Security
<input type="checkbox"/>	<input type="checkbox"/>	FWL (Faculty Workload)	<input type="checkbox"/>	<input type="checkbox"/>	Service Desk
<input type="checkbox"/>	<input type="checkbox"/>	HCM	<input type="checkbox"/>	<input type="checkbox"/>	UAPC - Prod
<input type="checkbox"/>	<input type="checkbox"/>	HCM Implementation	<input type="checkbox"/>	<input type="checkbox"/>	UAT - Testing
<input type="checkbox"/>	<input type="checkbox"/>	HR	<input type="checkbox"/>	<input type="checkbox"/>	Work Study
<input type="checkbox"/>	<input type="checkbox"/>	IMS			

\*\*Please do not check multiple groups unless the employee will support & resolve cases for the selected group. Email notification of Case assignment is sent to the group or assignee. As a note, CRM access allows visibility to all cases within the employee's Business Unit.

# CUNY *first* Production CRM User Access Request Form

## FOR EMPLOYEE:

Last Name:

First Name:

Date of Security Activation:

**OR:**

Date of Security Deactivation:

## MANAGERIAL REQUEST:

Business Unit:

Department:

Requesting Manager Last Name:

First Name:

Requesting Manager Signature:

Date:

## APPROVAL:

Campus Help Desk Manager Last Name:

First Name:

Campus Help Desk Manager Signature:

Date:

\*CRM Training Completed Date:

**\*Please Note: Before access is granted, user must have completed training in CRM.**

## SPECIAL CONSIDERATIONS OR COMMENTS: (List additional roles required below)