

Instructions for completing and submitting request forms

FS002 – Request for Financial System General Ledger Access

This form is required in order to access the General Ledger on PeopleSoft. The user must have a System Operator ID in order to access the General Ledger.

From the **Finance - University of Houston System Finance System References and Forms** page

1. Scroll down to ***FORMS – Requests for Financial System Access*** under **FS002 – Request for Financial System General Ledger Access**
2. Click on either **MS Word** or **Adobe (pdf)**
 - a) **MS Word** allows you to enter data directly onto ***Form FS002***. You can either save ***Form FS002*** to your hard drive or fill out ***Form FS002*** directly online and then print. Use the mouse or the tab button to maneuver and enter data onto the form.
 - b) **Adobe (pdf)** allows you to print ***Form FS002*** and then manually fill out the form.
3. Fill in the top portion of the form:
 - a) ***Effective Date*** is the date on which the action is to take place (e.g. termination date)
 - b) ***Action Requested***
 - 1) ***Set Initial Security*** – for new users
 - 1) ***Add Operator Class(es)*** – to add new functions to an existing user
 - 2) ***Delete Security Class(es)*** – to remove functions from an existing user
 - 3) ***Inactivate All Access*** – for terminated employees or reassigned employees
 - c) ***Employee Information*** – please fill in each field
 - 1) ***Name***
 - 2) ***EmplID*** – available from your business manager
 - 3) ***OperID*** – required field
4. Sign the form and get necessary approvals. Be sure to keep a copy for your records
5. Second section must be filled out by department business manager

FOR UNIVERSITY OF HOUSTON:

Send forms via UH mail to ***Financial Systems-0913*** or ***fax to 713-743-8799***.

For additional assistance, please call the ***Help Desk at extension 31411***.

FOR UH-CLEAR LAKE, UH-DOWNTOWN, UH-VICTORIA:

Contact your campus security coordinator.
