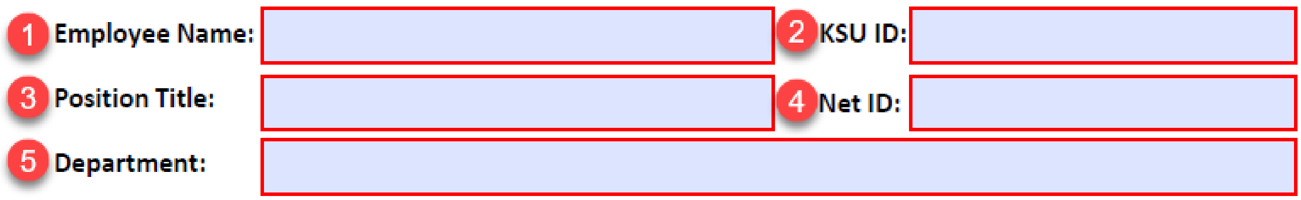
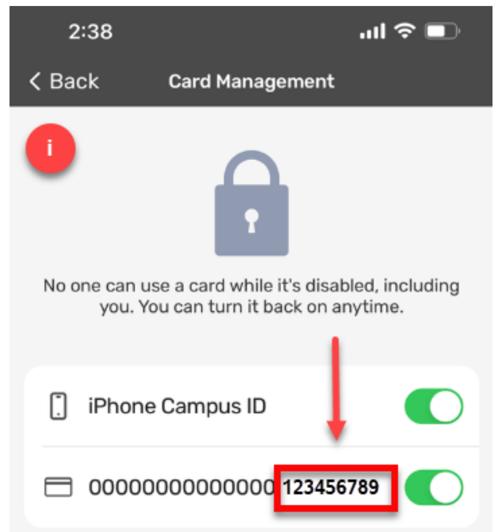
Job Aid: How to Request Access to SAS Financial Reports

The purpose of this job aid is to describe how to complete a SAS User Account Request form. The form can be found here: https://fiscalservices.kennesaw.edu/docs/FinancialReportingDataWarehouseUserAccountRequestForm.pdf

Enter Account Requester Information





1. Requester's first and last name
2. Requester's KSU ID
   a. To find your KSU ID with a Mobile Talon Card:
      i. Open the Transact eAccounts App and sign in.
      ii. Click the gear icon in the top right corner to open your account manager.
      iii. Select Card Management.
      iv. The KSU ID number is the **last 9 digits** of the numeric string as indicated in phone app image.
      v. Please note that for Android phones, you may need to rotate the device horizontally to see the full KSU ID number.
   b. To find your KSU ID on a physical Talon Card: Locate the ID number near the bottom left of the card, as indicated in the Talon Card image.
3. Requester's position title
4. Requester's Net ID
5. Requester's home department

Select User Type

1. **New User -** Select this option if:
   a. You **do not have** a Financial SAS account.
   b. You have an Academic or non-financial SAS account.
2. **Modify Existing User -** Select this option if:
   a. You have a Financial account and are requesting additional department access.
   b. You are removing existing department access.
   c. You are requesting access to additional reports.

Select (Grants Users Only)

1. **Grants Accountant -** Select this option if you are in the Office of Fiscal Services Grants Accounting department.
2. **Grants Manager -** Select this option if you are the budget owner for one or more grants.

Data Description

1. Grants Reports users may skip this section and go to **Required Signatures**.
2. In the “Departments to Add” box, list the **7-digit department numbers** for which you are requesting access.
    a. You may list multiple department numbers.
    b. If you require access to an **entire division**, you may list the 3-letter prefix for the division (e.g., BUS, SCM).
    c. Do not enter speed keys or other speed chart fields (like fund), as SAS Security is granted by department or division only.
    d. If you need access to a Project that is outside of your department access, list it here. Projects within your department are automatically included in your access.
3. In the “Departments to Remove” box, you may list department numbers that are no longer needed.
4. Check the box if you need access to Position Management data.
    a. Position Management reports include ***employee salary*** information.
    b. Additional review may be required to confirm that you are authorized to use these reports.

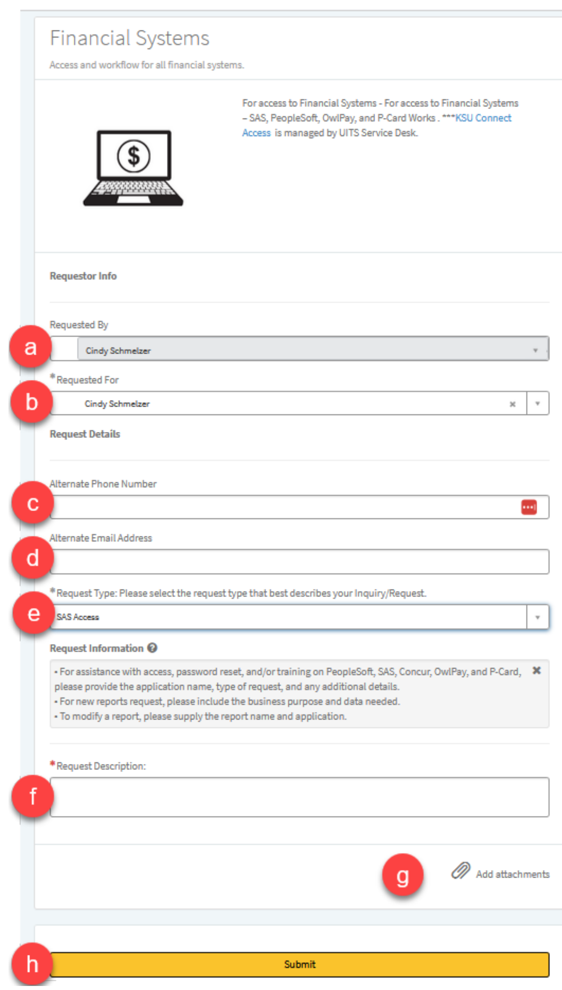
Required Signatures

1. The requester, the requester’s supervisor, and the business manager for the requested departments must complete the gray signature box on the bottom of page 1 via DocuSign. ***Note:*** *The business manager’s signature is not required for users within the Office of Budget and Planning or Grants Reports users.*
2. The requester must read the Financial Reporting Confidentiality Agreement on pages 2 and 3.
3. The requester must complete the gray signature box on the bottom of page 3 via DocuSign to indicate acceptance of the Financial Reporting Confidentiality Agreement.

Submission Instructions

Once the form has been signed, submit to OFS Service Now.

1. Navigate to https://kennesaw.service-now.com/ofs and select **Service Request**.
2. Select Financial Systems, select Financial Systems again.
3. Complete the form.
    a. Requested By is the individual entering the request
    b. Requested For is who the subject of the request
    c. (Optional) Alternate Phone Number
    d. (Optional) Alternate Email
    e. Request Type is **SAS Access**
    f. Provide a brief description
    g. Attach the completed and approved SAS Financial User Account Request Form
    h. Click Submit



Note: Please allow 3-5 days for account creation. UITS will notify the new SAS Financial Account User via email when the account has been created. Please test your login and ability to open reports prior to attending a SAS training class. The link for SAS training can be found here: https://share.percipio.com/cd/SnsxlAIVn .