



EduTech Staff Only:
Date Received: _____
Processed By: _____
Date Processed: _____

Request for Security Modification nVision Financial Application

Type: Add New User Remove User Change User Permissions Change Role Permissions

Date: _____ District Name: _____

Employee/Role Name: _____ nVision User ID: _____

Job Title: _____ Phone: _____

Email Address: _____ Replacing Employee Name: _____

Administrative Signature to Authorize Security Changes: _____

Please Print Name and Job Title:

2nd Administrative Signature to Authorize Security Changes: _____

Please Print Name and Job Title:

Assign User Role - Place a ✓ next to the role you would like this user to have.

Contact EduTech for additional information regarding permissions for each role.
To change a specific role specify changes in Special Notes section or request additional form.

Finance Roles

Accounting Reports and Lookup		
Account Payable Clerk - CBO		
Accounts Receivable		
Bank Reconciliation - CBO		
District Clerk		
ExtraClass Treasurer		
Fiscal Manager - CBO		
Requisition User		
Requisition Approver		
Treasurer		
Superintendent		

Human Resource Roles

Attendance Entry		
Attendance Inquiry		
Employee Lookup		
Human Resource Clerk		
Payroll Clerk - CBO		
Staff Evaluation/APPR		

District Specific Roles

Human Resource Module

Assign Buildings and Departments to User or write "All"

Buildings

Departments

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Attendance Code Permissions

- Allow Take From Deduction Attendance Entries
- Allow Donation Attendance Entries
- Allow Pay Out Attendance Entries
- Allow Unit Taken Attendance Entries
- Allow Earned Accrual Attendance Entries
- Allow Prior Balance Attendance Entries
- Allow Leave Request Attendance Entries

Employee View Permissions

- Grant access to employees that are not assigned to a building
- Grant access to employees that are not assigned to a depart
- Grant access to View/Modify Employee SSN

Accounting Module

Journal Entry Type Permissions

- Access to Standard Journal Entries
- Access to Budgetary Adjustments
- Access to Opening Entries – Ledger
- Access to Opening Budget Entries – Subsidiaries

Account/PO Balance Overrides

- Can Exceed Account Balance on PO up to: \$ _____
- Can Exceed Account Balance on CD up to: \$ _____
- Can Exceed PO Balance up to: \$ _____
- Can Enter Unbalanced Journal Entries

Approval Permissions

- Can Approve Budget Transfers
- Can Approve Journal Entries
- Can Approve Cash Receipts
- Requires Budget Transfer Approval
- Requires Journal Entry Approval
- Requires Cash Receipt Approval

Account Code Permissions

Please enter all account code ranges the user should have access to and check corresponding module checkbox.
For additional account ranges attach another sheet.

Appropriations

- Report Only Accounting
- Budgeting Receivables

Fund: _____ to _____
 Function: _____ to _____
 Object: _____ to _____
 Location: _____ to _____
 Program: _____ to _____

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General Ledger

- Report Only Accounting
- Budgeting Receivables

Fund: _____ to _____
 Function: _____ to _____
 Fund: _____ to _____
 Function: _____ to _____

Fund: _____ to _____
 Function: _____ to _____

Revenue

- Report Only Accounting
- Budgeting Receivables

Fund: _____ to _____
 Function: _____ to _____
 Object: _____ to _____

Fund: _____ to _____
 Function: _____ to _____
 Object: _____ to _____

Fund: _____ to _____
 Function: _____ to _____
 Object: _____ to _____

Special Notes:

Requisitioning Module

Approval Path(s) _____

- Allow Account Balances to be Viewed

If new Approval Path is needed please fill out Requisition Setup Form

**Fax completed form to EduTech at 315-332-7355
 or email to finance@edutech.org.**