



Overview

Ohio University uses many systems to manage our financial and administrative data. Access to some of these systems is automatically granted, while others must be requested and authorized by an approver. This guide explains the access that is available to users in departmental units, who must approve the requests, and where to submit your access requests.

Automatic Access for Faculty & Staff

Faculty and staff access is automatically provisioned for many of our systems. These include:

- Account Validation Tool (AVT)
- Concur
- OBI Finance Dashboard
- OBI Employee Dashboard
- Workforce for hourly staff

Access for Students

Students are automatically granted access to the following systems:

- OBI Employee Dashboard
- OBI Student Funds Available Dashboard

Students are granted access to Workforce after departments create the new hire record in Workforce.

Student access to any other finance or HR system requires CFAO approval and should be submitted to the OIT Service Desk.

Faculty & Staff Access Managed by OIT

Faculty or staff access to the following systems require CFAO approval and should be submitted to the OIT Service Desk.

- BobcatBUY (BCB)
- EBIZ, including the following roles:
 - OUHR:BUMS Planning Unit
 - OUHR:Assignment Costing
 - OUHR:Individual Compensation Distribution
 - OUGMS:Internal Award User
- Journal Entry Tool (JET) – [JET training](#) is required.
- The following OBI access:
 - HR Dashboards (which includes access to the HR reports catalog and the Financial & HR Systems Access Dashboard)
 - Limited HR access that allows drilldowns from the finance dashboards (see roles in the chart below)
- HelioCampus Payroll Data

Financial & Administrative Systems Access

FARM Access

Access to FARM (Financial Approvers & Related Metadata) is managed by CFAOs (or fiscal officers that the CFAO's have authorized). The fiscal officer role in FARM allows users to set up their own delegates for their units.

If the fiscal officer needs to be changed for a unit, please contact Finance Customer Care.

Workforce Access

As stated earlier, hourly employees are automatically granted access to Workforce to record their hours worked and PTO. Access for timesheet approvers is granted by the payroll office. You may request Group Student Coordinator access for student employees who need to approve timesheets, or Group Manager access for faculty/staff who need to approve employee timesheets, maintain schedules, or update payroll costing.

Detailed Systems Access

The following table provides an overview of the access available to departmental users.

System	Role/Responsibility	Used for	Approval Needed	Send Access Requests To
AVT - Account Validation Tool	AVT User	Check to see if GL or PTA account strings are valid	N/A – access is automatic for all faculty & staff	N/A – access is automatic for all faculty & staff
BCB - BobcatBUY	Shopper or Requestor access (only requestors are permitted to submit requisitions)	Procure goods or services/submit requisitions	Planning Unit's Chief Financial & Administrative Officer (CFAO)	submit a BobcatBUY Access and Maintenance Request Form to the OIT Service Desk
Concur	Student or temp employee access	Make travel arrangements, submit travel expense reports, and update PCard transactions	Supervisor (for students or external temp employees only)	Concur access is automatically granted to all active faculty and staff. Access requests for students or external temp employees should be sent to the OIT Service Desk by the supervisor.
EBIZ - Oracle EBusiness Suite	OUHR:Assignment Costing	Update salaried employees' assignment costing	Planning Unit's CFAO	OIT Service Desk

Financial & Administrative Systems Access

System	Role/Responsibility	Used for	Approval Needed	Send Access Requests To
EBIZ - Oracle EBusiness Suite	OUHR:BUMS All Employees	Update the Concur default cost center for any employees who are not in your planning unit	Human Resources	OIT Service Desk
EBIZ - Oracle EBusiness Suite	OUHR:BUMS Planning Unit	Update the Concur default cost center for employees within your own planning unit	Planning Unit's CFAO	OIT Service Desk
EBIZ - Oracle EBusiness Suite	OUHR:Individual Compensation Distribution	Submit ICD requests for employee compensation	Planning Unit's CFAO	OIT Service Desk
EBIZ - Oracle EBusiness Suite	OUGMS:Internal Award User	Set up, maintain, and close out internal projects and awards	Planning Unit's CFAO	OIT Service Desk
FARM - Financial Approvers & Related Metadata	Fiscal Officer	Update financial approvers and set up delegates to assist with maintaining approvers in FARM	Planning Unit's CFAO	Finance Customer Care
FARM - Financial Approvers & Related Metadata	Delegates	Update financial approvers	Planning Unit's CFAO	Planning Unit's CFAO
JET - Journal Entry Tool	OUJE:Journal Entry Tool	Upload journal entries	Planning Unit's CFAO. (JET training is required)	OIT Service Desk
OBI - Oracle Business Intelligence	Finance Dashboard	Use finance lookups, or view data in the GL, Grants, Purchasing, or Equipment Inventory dashboard pages	CFAO (for students or external temp employees only)	Access is automatically granted to all active faculty and staff. Access requests for students or external temp employees should be sent to the OIT Service Desk by the CFAO.
OBI - Oracle Business Intelligence	Student Funds Available	Used by students to view funds available for student orgs or to look up cost centers and object codes	N/A	Access is automatically granted to students, faculty, and staff.

Financial & Administrative Systems Access

System	Role/Responsibility	Used for	Approval Needed	Send Access Requests To
OBI - Oracle Business Intelligence	Employee Dashboard	Look up employee directory information or look up an employee's CFAO	CFAO (for external temp employees only)	All faculty, staff, and students are automatically granted access. If an external temp worker requires access, the CFAO should request access through the OIT Service Desk
OBI - Oracle Business Intelligence	Human Resources Dashboard (FAA_HR_DBRD_USERS)	Look up employee HR and payroll data such as absences, appointment and costing information, salary, and payroll details. Additionally, this access allows users to drill down to the payroll detail from the finance dashboards. It also allows users to view access data on the Finance & HR Systems Access dashboard.	Planning Unit's CFAO	OIT Service Desk
OBI - Oracle Business Intelligence	HR_PEDS_ALL	For users who require access to the payroll drilldowns from the finance dashboard, but do not require full HR dashboard access	Planning Unit's CFAO	OIT Service Desk
OBI - Oracle Business Intelligence	HR_PEDS_PTA	For project/award key members who require access to the payroll drilldowns for their assigned projects/awards only	Planning Unit's CFAO	OIT Service Desk
OBI - Oracle Business Intelligence	HelioCampus Payroll Data (FAA_HR_DBRD_HELIO_PAYROLL_USERS)	View employees' appointment, FTE, and payroll detail used in HelioCampus benchmarking	Planning Unit's CFAO	OIT Service Desk
Workforce	Hourly Users	Record hours worked and PTO (for hourly employees)	N/A - automatic	N/A – access for hourly staff is automatic. Access for hourly

Financial & Administrative Systems Access

System	Role/Responsibility	Used for	Approval Needed	Send Access Requests To
				students is granted after the department hires the student into Workforce.
Workforce	Group Student Coordinator	Approve timesheets	Manager	Payroll
Workforce	Group Manager	Approve timesheets and maintain employees' costing/schedules	Manager	Payroll

Department-Specific User Access

Some departments have unique systems access/roles that are not listed in this guide. If you require access for other financial & administrative systems/roles that are not listed above, please contact the OIT Service Desk and they will route the ticket to the appropriate approvers.

View EBIZ and OBI Access

The Finance & HR Systems Access dashboard is available in OBI for CFAOs (and other authorized users) to view EBIZ and OBI access to Finance or HR subject areas. Access to this dashboard is restricted to only users who have access to HR data. For more information about this dashboard, view the [Finance & HR Systems Access Dashboard quick reference guide](#)

Contact Information

- **OIT Service Desk:** Visit <https://help.ohio.edu/TDClient/30/Portal/Home/> to create an OIT service ticket.
- **Finance Customer Care:** financecustomercare@ohio.edu
- **Payroll:** payroll@ohio.edu
- **Planning Unit's Chief Financial & Administrative Officer (CFAO):** If you need to contact your CFAO and you're unsure who that is, use the [Employee Lookup](#) dashboard in OBI to identify your CFAO.