Lucas County Oracle Cloud
Financial Access Request Form

Applicant Responsibilities (Your signature below indicates acceptance of these responsibilites)

1. Access is restricted to Lucas County employees performing official duties of their position.
2. Comply with the Lucas County Internet use policy http://www.co.lucas.oh.us/DocumentCenter/View/66778/Internet-and-Email-Policy-22a.
3. Safeguard your user ID and password, do not share with anyone. Sharing of this information will result in revocation of your access.
4. All public records requests must follow Lucas County public records request policy.

Instructions

1. Complete sections 1 and 2 and sign where indicated in section 3.
2. Obtain Manager/Director approval. A user account will not be created or modified without the Manager/Director signature.
3. Email the completed form to lcishelpdesk@co.lucas.oh.us.
4. Please allow up to one week for the changes to take effect. Expedited requests will be handled on a case-by-case basis.

Section 1: User Information

New User   **Delete User**   **Modify User**

First Name:	**MI:**	**Last Name:**
Department Name:	**Address:**	
Department Code: (ex: 125005)	**Phone:**	**Email:**
Notes:		

Section 2: Oracle Roles   *Check all that apply*   OR   *model your roles after this user name:* _____

General User Roles		See Attached for Role Descriptions		
Accounts Payable (Invoicing)	AP Specialist	Read Only		
Accounts Receivable (Receive Payments)	AR Specialist	Read Only		
Assets	Accountant	Accounting Manager	Read Only	
Procurement (Requisitions)	Agency Requester			
Ability to Approve Requisitions	Include the department number that you will approve requisitions for: (ex. 125005) _____			
Budget Analyst *	Read Only			
Financial Analyst	Read Only			
Agency Limited Roles - Requires Support Services Approval				
	Supplier Sales Rep	Supplier Self Service Admin	Supplier Customer Service Rep	
	Supplier Bidder	Run Supplier Report		
Support Services, Auditor, OMB, Treasurer, LCIS Roles				
Support Services	Buyer	Supplier Bidder	Category Manager	
	Expense Audit Manager	Supplier Customer Service Rep	Contract /Catalog Admin	
	Expense Auditor	Supplier Sales Rep	Procurement Manager	
	Expense Manager	Supplier Self Service Admin	Integration Specialist	
	Accts Receivable Specialist	Corporate Card Admin	Sourcing Project Collaborator	
		Enterprise Contract Manager	Procurement Application Admin	
OMB *	Acct Receivable Manager	Budget Manager		
Auditor	General Accountant	Gen Accounting Manager	Financial Application Admin	
	Accounts Payable Supervisor	Asset Accounting Manager	Financial Integration Specialist	
	Accounts Payable Manager	Expense Audit Manager	Expense Auditor	
	Supplier Manager			
Treasurer	Cash Manager	Financial Application Admin		
LCIS	Purchase Analyst	Financial Integration Specialist	Financial Application Admin	
	IT Security Manager	Application Administrator		

Section 3: Acknowledgement & Signature

Employee Signature & Date:	**Date:**
As the manager/director of this employee, I authorize the access indicated above and I understand that any changes to this access will require additional written approval. Access requested is based on their official duties of their position.	
Manager/Director/ Name Printed:	**Phone:**
Manager/Director Signature & Date:	**Date:**
*** OMB Director Signature Required for Budget Analyst and OMB Roles:**	**Date:**

Module	Cloud Role	Role Definition
Financials	Financial Analyst	Analyzes the financial performance of an enterprise or an organization within an enterprise.
	Financial Application Administrator	Manages financial application administration. Collaborates with financial application users to maintain consistent financial application setup, rules, and access.
	Financial Integration Specialist	Individual responsible for planning, coordinating, and supervising all activities related to the integration of financial information systems.
General Ledger	General Accountant	Records and reports financial transactions and manages revenue, expense, asset, liability and equity accounts. Responsible for recording accounting adjustments, accruals, allocations, currency revaluations and translations.
	General Accounting Manager	Manages the general accounting functions of an enterprise including general ledger, subsidiary ledgers, and cost accounting.
Assets	Asset Accountant	Performs customer data management activities including data import, cleansing, duplicate identification, and duplicate resolution.
	Asset Accounting Manager	
	Asset Administrator	
Payables	Accounts Payable Specialist	Enters invoices ensuring accuracy, uniqueness, and completeness. Matches invoices to correct purchase orders or receipts ensuring that invoices comply with company policy.
	Accounts Payable Supervisor	Oversees the activities of Accounts Payables Specialists. Initiates and manages pay runs. Resolves non-data entry holds.
	Accounts Payable Payments Supervisor	
	Accounts Payable Invoice Supervisor	
	Accounts Payable Manager	Manages Accounts Payable department and personnel. Overrides exceptions, analyzes Oracle Fusion Payables balances, and submits income tax and withholding reports to meet regulatory requirements.
Expenses	Expense Audit Manager	Plans, leads, and controls the activities of the internal audit staff to achieve the objectives of the Internal Audit function for an organization.
	Expense Auditor	Reviews and audits expense reports on a daily basis to ensure compliance with the company's reimbursement policy.
	Expense Manager	Manages company's expense policies and processes. Reviews and proposes changes to expense policies.
Cash Management	Cash Manager	Protects and develops the company's liquid assets maximizing their use and return to the organization.
Receivables	Accounts Receivable Specialist	Manages and implements all customer payment activities, including receiving customer payments and electronic remittance advice, performing cash handling activities, processing customer payments, and applying payments to customer accounts.
	Accounts Receivable Specialist - Segregated Role	
	Accounts Receivable Manager	Manages all accounts receivable activities, including defining policy and controls, establishing processes and procedures, resolving issues, monitoring and analyzing accounts receivable balances, and creating reports and business intelligence.
	Accounts Receivable Manager - Segregated Role	
	Customer Data Steward	Performs customer data management activities including data import, cleansing, duplicate identification, and duplicate resolution.
	Customer Account Billing Inquiry	Privilege granted on a discretionary basis for a user to review customer account and related billing transactions on behalf of a customer.
Tax	Tax Accountant	Prepares and files tax returns and reports for an enterprise, including country, federal, state, and local corporate, payroll, and transaction taxes.
	Tax Administrator	Sets up technical areas and the integration with tax service providers.
	Tax Manager	Defines the tax policies and most efficient tax configuration. Sets up relatively stable entities that seldom require updates, such as tax regimes and taxes.
	Tax Specialist	Maintains tax configuration, especially the variable entities that require periodic updates, such as tax rates and tax jurisdictions.

Module	Cloud Role	Role Definition
Procurement	Procurement Manager	Procurement professional responsible managing a group of buyers in an organization.
	Procurement Contract Administrator	Procurement professional responsible for creating, managing, and administering procurement contracts.
	Procurement Application Administrator	Responsible for technical aspects of keeping procurement applications systems available as well as configuring the applications to meet the needs of the business.
	Procurement Integration Specialist	Individual responsible for planning, coordinating, and supervising all activities related to the integration of procurement information systems.
	Buyer	Procurement professional responsible for transactional aspects of the procurement processes.
	Category Manager	Procurement professional responsible for identifying savings opportunities, determining negotiation strategies, creating request for quote, request for information, request for proposal, or auction events on behalf of their organization and awarding future business typically in the form of contracts or purchase orders to suppliers.
	Supplier Accounts Receivable Specialist	Manages invoices and payments for the supplier company. Primary tasks include submitting invoices as well as tracking invoice and payment status.
	Supplier Customer Service Representative	Manages inbound purchase orders and communicates shipment activities for the supplier company. Primary tasks include tracking, acknowledging or requesting changes to new orders. Communicates order schedules that are ready to be shipped by submitting advance shipment notices, and monitors the receipt activities performed by the buying organization.
	Supplier Contract Administrator	Works with internal buyers and legal to negotiate and author supplier contracts and agreements. Tracks critical contract milestones, monitors supplier performance, and assists buyers during contract renewals, closeout, and amendments.
	Supplier Sales Representative	Manages agreements and deliverables for the supplier company. Primary tasks include acknowledging or requesting changes to agreements in addition to adding catalog line items with customer specific pricing and terms. Updates contract deliverables that are assigned to the supplier party and updates progress on contract deliverables for which the supplier is responsible.
	Advanced Procurement Requester	Prepares requisitions on behalf of others and has access to advanced requisition creation permissions.
	Procurement Catalog Administrator	Manages agreements and catalog content including catalogs, category hierarchy, content zones, information templates, map sets, public shopping lists, and smart forms.
	Purchase Analysis	Allows a user to preform line of business analysis on requisitions, purchase orders, and suppliers.
	Supplier Bidder	Sales representative from a potential supplier responsible for responding to requests for quote, requests for proposal, requests for information and reverse auctions.
	Supplier Administrator	Manages supplier profile and user provisioning.
	Supplier Manager	Manages supplier information and authorizes promotion of prospective suppliers to spend authorized.
	Supplier Self Service Administrator	Manages the profile information for the supplier company. Primary tasks include updating supplier profile information and requesting user accounts to grant employees access to the supplier application.
	Supplier Self Service Clerk	Manages the profile information for the supplier company. Primary tasks include updating supplier profile information and requesting user accounts to grant employees access to the supplier application.
Budgeting	Budget Analyst	Analyzes funds available. No changes to budgets can be made with this role.
	Budget Manager	Manages one or more control budgets, including relevant setup, budget loading, exception analysis, transactional overrides, and funds available analysis and reporting.
	Budget Preparer	Individual responsible for performing budget entry for one or more organizational units.