Finance Application Security Requests

Finance Apps Security Request

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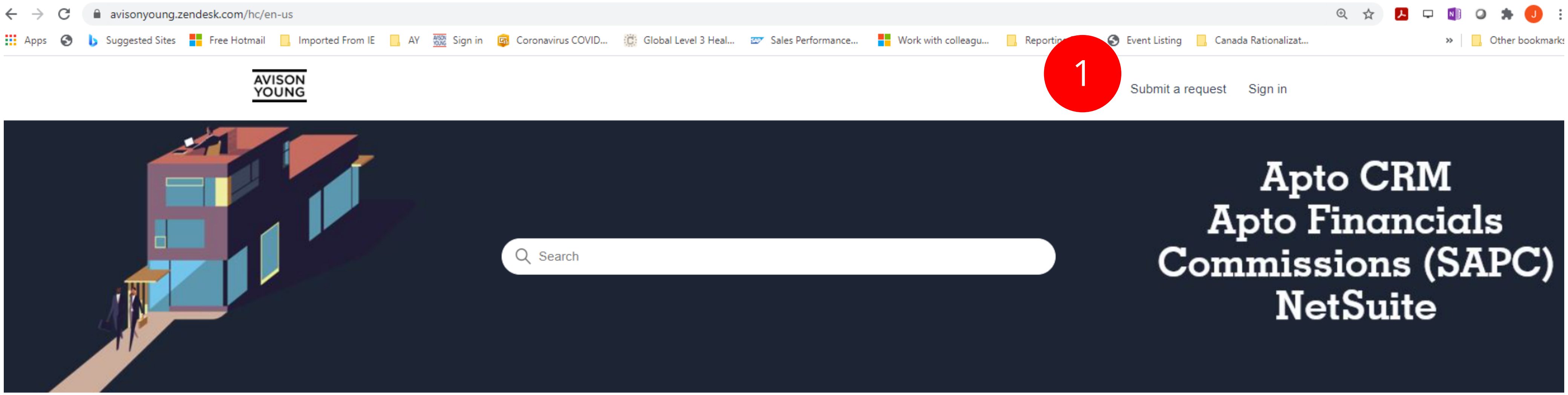
The following slides outline the process for requesting NetSuite and/or SAPC access via the Finance Apps Security Form in Zendesk

1. Go To Zendesk Guideand Click “Submit a Request”.



Finance Apps Security Request

2. Submit a Request page appears, click down arrow and select “Finance Apps Security Form”

Submit a request

2

Please choose your issue below

Finance Apps Security Form

3. Enter Requestor’s name in Your email address field
4. Enter “Security Request for [name of person]” in Subject

3

Your email address

4

Subject

5. Enter Description – Use this space for any special instructions, otherwise just copy Subject Line

5

How can we help you?

T B I

Finance App Security Request Options

Choose one of the three options:

6. Copy security from another user (most commonly used option)
7. Create or update a Deal Management security request (NetSuite DMS and SAPC only)
8. All Other General Security Requests (such as Role Changes or Trust Account Access)

6

Are you requesting to copy security from another user? (optional)

☐

Please indicate if you intend to use the copy from another user option.

7

Is this a Deal Management Security Request? (optional)

☐

Click here if this is a request for Deal Management Security, this selection will simplify the form.

8

Security Request Type

-

Copy Security From Another User

Copy Security from Another User

9. Enter the Email Address of the User for whom this access is being requested

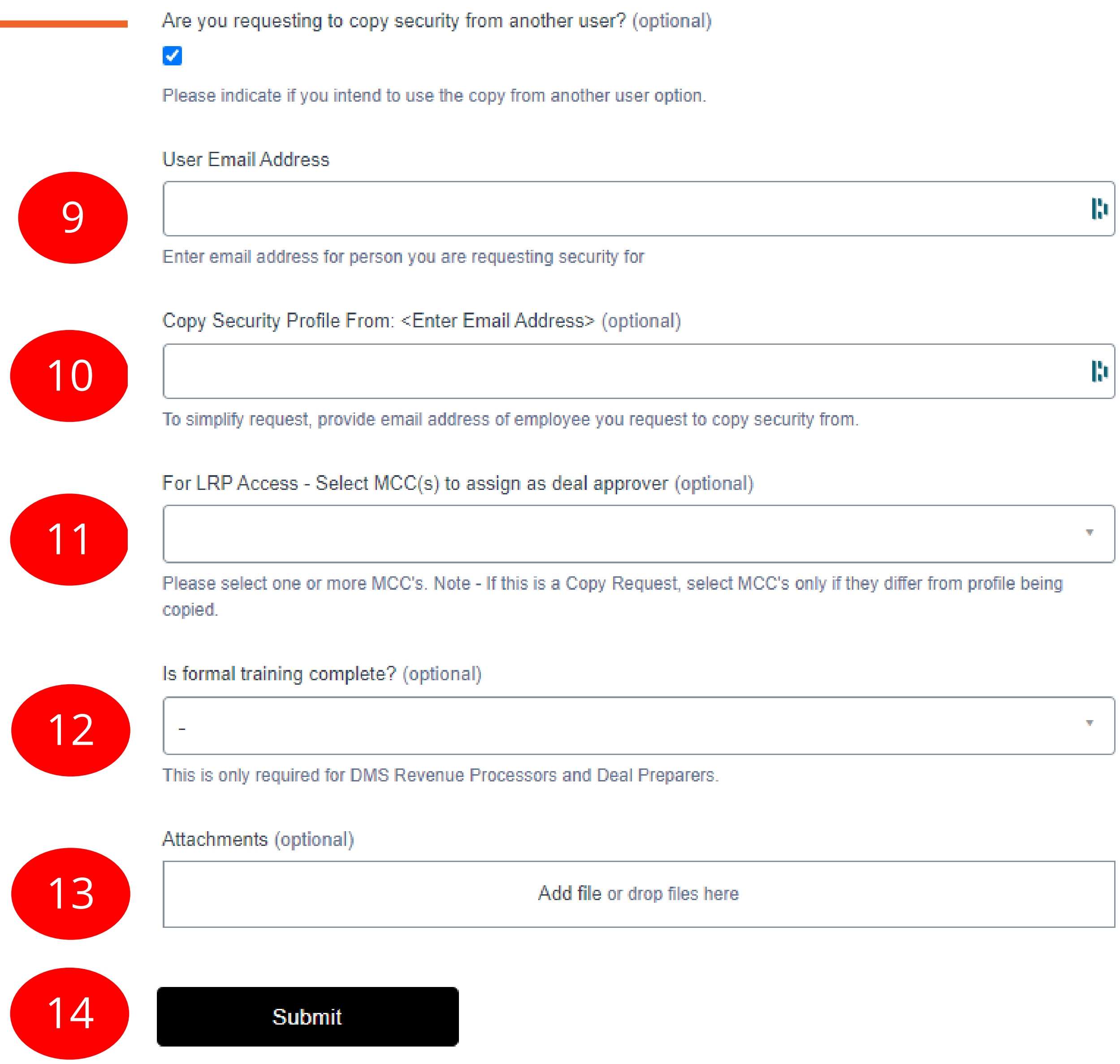
10. Enter the Email Address of the User whose profile is being copied

11. Select MCCs. *This field is only for DMS Local Revenue Processors and identifies market(s) for which they can **approve** transactions.* This only needs to be populated if the Market Cost Center(s) differs from the profile being copied. If it's the same, this field can be left blank.

12. Is formal training complete? *This is for DMS Revenue Processors and Deal Preparers only.* Training by the Finance Applications team is required before system access can be granted. Any comments on this training can be added to the "How Can We Help You" field.

13. Add Attachments (this is optional; there are no *required* attachments)

14. Click Submit (proceed to Slide #10)



Are you requesting to copy security from another user? (optional)

Please indicate if you intend to use the copy from another user option.

9

User Email Address

Enter email address for person you are requesting security for

10

Copy Security Profile From: <Enter Email Address> (optional)

To simplify request, provide email address of employee you request to copy security from.

11

For LRP Access - Select MCC(s) to assign as deal approver (optional)

Please select one or more MCC's. Note - If this is a Copy Request, select MCC's only if they differ from profile being copied.

12

Is formal training complete? (optional)

-

This is only required for DMS Revenue Processors and Deal Preparers.

13

Attachments (optional)

Add file or drop files here

14

Submit

Deal Management Security Request

Creating a Deal Management security request (NetSuite DMS and SAPC only):

15. Enter the Email Address of the User for whom this access is being requested

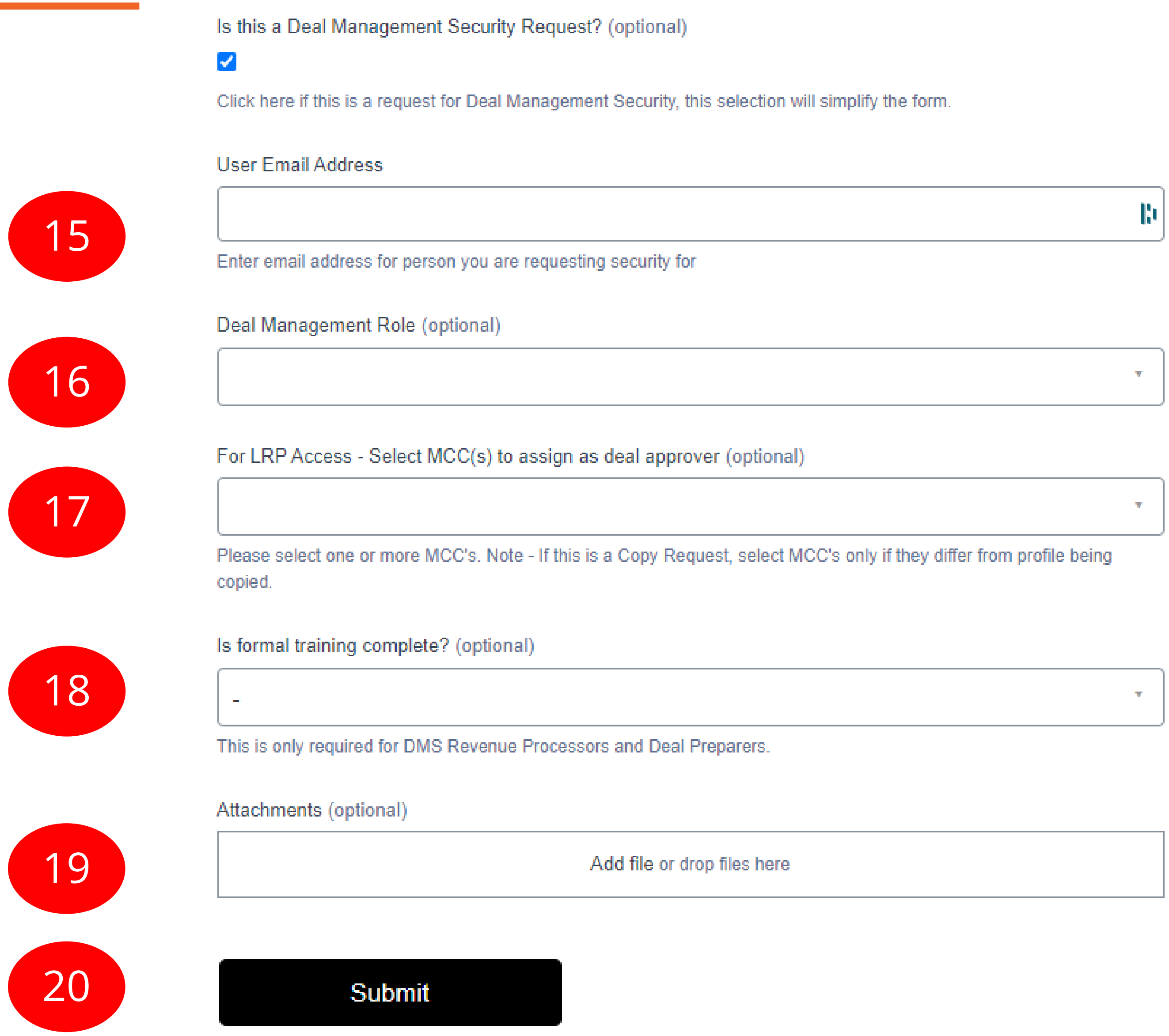
16. Select the Deal Management Role from the dropdown list

17. Select MCC(s). *This field is only for DMS Local Revenue Processors and identifies market(s) for which the User can* ***approve*** *transactions.*

18. Is formal training complete? *This is for DMS Revenue Processors and Deal Preparers only.* Training by the Finance Applications team is required before system access can be granted. Any comments on this training can be added to the “How Can We Help You” field.

19. Add Attachments (this is optional; there are *no required* attachments)

20. Click Submit (proceed to Slide #10)



General Security Request

General Security Requests

21. Select Security Request Type from dropdown menu. Depending on your selection, additional fields will display

21. Enter the Email Address of the User for whom this access is being requested

22. If applicable, enter the Email Address of the User whose profile is being copied (this field also displays here to accommodate more complex requests)

21

Security Request Type

Add security role(s) to existing or new user

22

User Email Address

Enter email address for person you are requesting security for

23

Copy Security Profile From: <Enter Email Address> (optional)

To simplify request, provide email address of employee you request to copy security from.

General Security Request: NetSuite Roles

General Security Request (continued)

24. These fields are the specific Roles you are requesting for the User. Choose the applicable role from the dropdown.

NOTE: Roles are categorized to improve the user interface for this section

24

NetSuite Accounts Receivable Role (optional)

NetSuite role for Accounts Receivables

NetSuite A/P Roles (optional)

NetSuite Accounts Payable Roles

Avid Approval Group (optional)

Required for Avid Check Approval Access

NetSuite Accountant Role (optional)

NetSuite CFO/Controller Role (optional)

NetSuite CFO/Controller Role

NetSuite Reporting & Integration Roles (optional)

NetSuite Ops Manager Roles (optional)

NetSuite Ops Manager Roles

NetSuite Admin and other roles (optional)

NetSuite Administrator and other technical roles

General Security Request (con't)

General Security Request (continued)

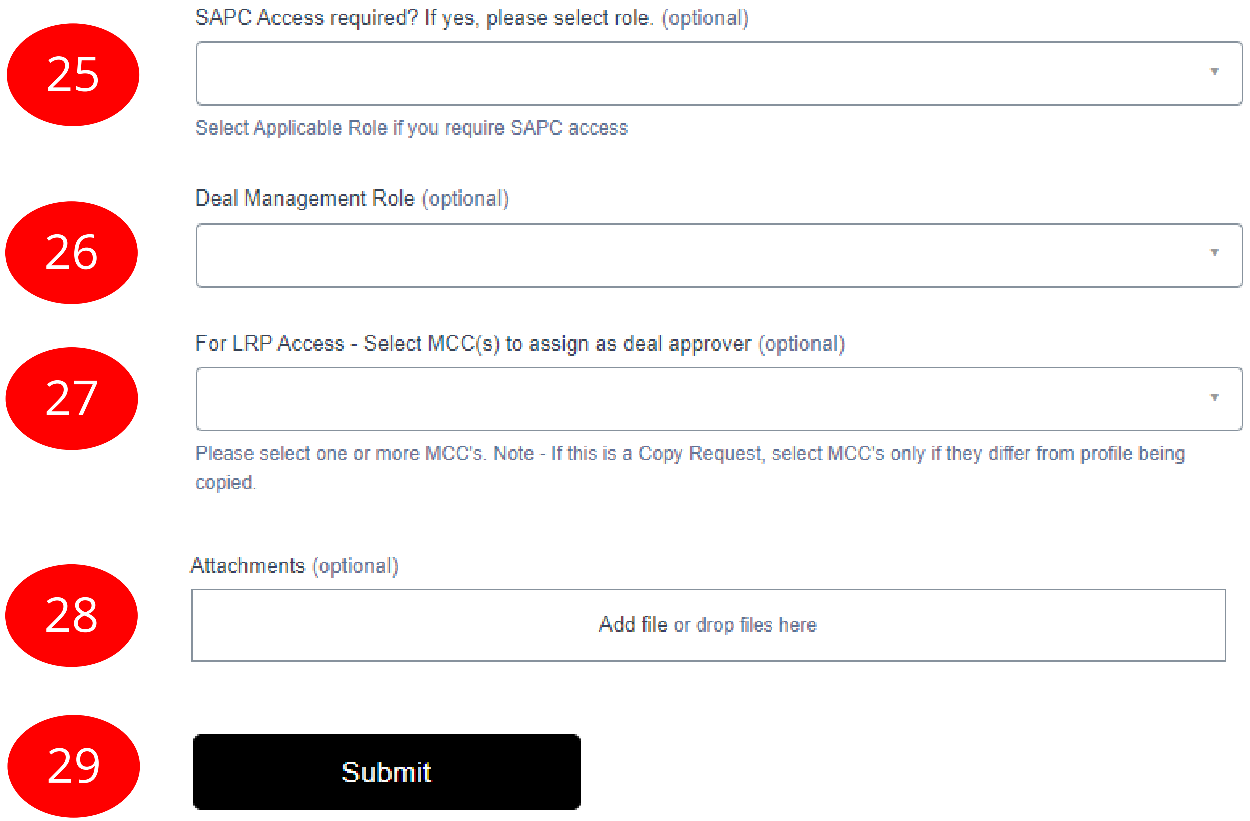
25. If you are requesting SAPC access for this User, select the desired role from the dropdown. SAPC roles options are included in the appendix.

26. If applicable, for Deal Management requests, select the desired role from the dropdown (this field also displays here to accommodate more complex requests)

27. Select MCC(s). *This field is only for DMS Local Revenue Processors and identifies market(s) for which the User can **approve** transactions.*

28. Add Attachments (this is optional; there are no *required* attachments)

29. Click Submit (proceed to Slide #10)



NetSuite Security Request

Next Steps:
Once the Finance Apps Security Form is submitted, the Finance Apps team will take it from here. Necessary approvals will be obtained, and the request will be processed. The Requestor and User will receive emails once these steps are complete.

Appendix

SAPC Roles

Applicable SAPC Roles for End Users:

- Accountant
- Payroll
- Revenue Processor (LRP)
- Operations Manager (non-LRP)
- Operations (FinApps Team only)