UMass | Dartmouth

Financial Systems
User Access Security Form
Requisition/BankCard Reallocation FinancialReporting
New user /Change of Access /Disable Access

Instructions for completing this form:

- This form must be completed and approved by the user's Supervisor or PI. **(Users may not approve their own access)**
- Special circumstances must exist for a person to be both a requisitioner and a requisition approver.
- **Training is required for all new user access;** Training information may be found here: https://www.umassd.edu/peoplesoftfinance/training/
- Please email or mail completed form to Suzanne Audet (saudet@umassd.edu), Foster Administration Building, Room 202
- **Incomplete Form will result in return of form and delay of access**
- BuyWays, BankCard and Expenses Training is through UPST. https://upst.umassp.edu/upst

Section 1 Type of Request (Please check the box of the desired action)

☐ **New User Account** ☐ **Change of Existing Access** ☐ **Remove Access**

Section 2 General User Information

Name	
Email	
Phone	
Home Department Name &Number	
Location	
EmpID (Required)	

Section 3 Role Selection (Please Check the boxes of the desired security role(s). Fill only if new access is required

Note: Req Data entry operators cannot also be requisition approvers, choose Shopper

☐ **Shopper -Data Entry Operator**	**May start a requisition and choose items for purchase in BuyWays.** Can't Submit Cart-must assign to Requisitioner	**Choose either Shopper or Requisitioner, not both** Training is required for access to BuyWays, PeopleSoft or Summit. Enter a training date or scheduled training date	
☐ **Requisitioner** (Training Required)	**May shop & submit shopping cart for approval &load bank card receipts in BuyWays**	**Training Date Required**	
☐ **Requisition Approver** (Training Required)	**Approves BuyWays Requisitions/BankCard Receipts List Approval Dept in Section 4 May be shopper, but not Requisitioner**	**Training Date Required**	
☐ **Reporting/SUMMIT** (Training Required)	**Run Financial reports and review Budget info in PeopleSoft &Summit.** List Departments in Section 4	**Training Date Required**	
☐ **BankCard Reallocator** Training Required	**Ability to reallocate Bankcard charges. List department access in Section 4**	**Card Holder Name** **Training Date Required**	
☐ **Expense Manager** (Training Required)	**Approve employee expense reports. List departments to approve in Section 4**	**Training Date Required**	

Section 4 Department Security Access: (list department(s) to and/or Procard Reallocation Access. Check the appropriate box and fill in the department.

Req Approver	Reporting/Summit	BankCard Reallocator	Expense Approvcr	Department Name	Department Number (Required)
☐	☐	☐	☐		
☐	☐	☐	☐		
☐	☐	☐	☐		
☐	☐	☐	☐		
☐	☐	☐	☐		

Add additinoal departments via attachment

Department Head/Supervsor

Print Name _____ Email _____

Signature _____ Date _____

Data Custodian: **Suzanne Audet** saudet@umassd.edu

Signature _____ Date _____

Setup Complete? ☐