

UMass Dartmouth Finance User Access Security Form

Section 1: Check the type of Access - Choose 1

New User – First time Financial System Access – First time access to PeopleSoft Finance, Summit Financial Reporting, BuyWays Procurement. Check only if you are a first-time user.

Change of Existing Access – Has current access to at least one Financial system. Needs additional module or additional department access. **(Check any New Module and/or define additional Department Access)**

Department Transfer – Transfer to new Department. Check all modules needed and define department access needed. Check modules needed and define department access as if first time user.

Returning User – Previous user that is returning to the university. (Seasonal and rehired employees) Check modules needed and define department access as if first time user.

Remove Access – Check to Remove Security Role or Department Access. Next Check Remove Role and/or Remove Department from the appropriate Security Role(s) below.

Section 2: Complete for the user needing Access- Fill in all 4 fields

Name	Payroll Dept (10 Characters)	Employee ID (8 Digits)	Email Address

Section 3: Check Role(s) to Add or Remove - Do not combine Adds and removals. For Approvals and reporting define Departments to Add or remove. These would be departments you have the authority to approve or report.

BuyWays Shopper Can create purchase requisitions, but not submit Cannot be Requisitioner or Requisition Approver	Add Role	Remove Role	Training Date
BuyWays Requisitioner Can create and Submit purchase requisitions Cannot be Shopper or Requisition Approver	Add Role	Remove Role	Training Date
BuyWays Requisition Approver Can approve purchase requisitions Cannot be Shopper or Requisitioner	Add Role	Remove Role	Training Date
Enter one or more department(s)			
Select One Action: Add Requisition Approval Department(s) Remove Requisition Approval Department(s)	Approval Department	Approval Department	Approval Department
Supplier Requester Can Request New Suppliers	Add Role	Remove Role	Training Date

UMass Dartmouth Finance User Access Security Form

PeopleSoft Financial Reporting and Budget Lookup	Add Role	Remove Role	Training Date
Summit Financial Reporting	Add Role	Remove Role	Training Date
Select One Action:			
Add Reporting Department(s)			
Remove Reporting Department(s)			
Enter one or more department(s)			
	Reporting Department	Reporting Department	Reporting Department
Must be a PI and have Summit Financial Reporting Training or Summit Financial Reporting Access to be Granted this role	Add Role	Remove Role	Summit Reporting Training Date
Summit PI User			

Section 4: Approvals - Supervisor /Budgetary Control Approver, Controller Approval

Supervisor Name	Supervisor Signature	Date of Approval
Controller/Assoc Controller Name	Controller/Assoc Controller Signature	Date of Approval

Return the completed form to controller.request@umassd.edu