

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 |
|------|---------------------------------|---------------------------|---------------|
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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.

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|--|---------------------------------|----------------------------|----------------------------|
| 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 |
| Select One Action: | Enter one or more department(s) | | |
| Add Requisition Approval Department(s) | Approval Department | Approval Department | Approval Department |
| Remove Requisition Approval Department(s) | | | |
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| Supplier Requester Can Request New Suppliers | Add Role | Remove Role | Training Date |
|--|-----------------|--------------------|----------------------|

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| <p>PeopleSoft Financial Reporting and Budget Lookup</p> | Add Role | Remove Role | Training Date | | | | | | | | | | | | | | | | |
|---|----------------------|----------------------|--------------------------------|----------------------|----------------------|----------------------|----------------------|--|--|--|--|--|--|--|--|--|--|--|--|
| <p>Summit Financial Reporting</p> | Add Role | Remove Role | Training Date | | | | | | | | | | | | | | | | |
| <p>Select One Action:</p> <p>Add Reporting Department(s)</p> | | | | | | | | | | | | | | | | | | | |
| <p>Remove Reporting Department(s)</p> | | | | | | | | | | | | | | | | | | | |
| <p>Enter one or more department(s)</p> | | | | | | | | | | | | | | | | | | | |
| <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr style="background-color: #d9e1f2;"> <th style="padding: 5px;">Reporting Department</th> <th style="padding: 5px;">Reporting Department</th> <th style="padding: 5px;">Reporting Department</th> <th style="padding: 5px;">Reporting Department</th> </tr> </thead> <tbody> <tr><td style="height: 20px;"> </td><td> </td><td> </td><td> </td></tr> <tr><td style="height: 20px;"> </td><td> </td><td> </td><td> </td></tr> <tr><td style="height: 20px;"> </td><td> </td><td> </td><td> </td></tr> </tbody> </table> | | | | Reporting Department | Reporting Department | Reporting Department | Reporting Department | | | | | | | | | | | | |
| Reporting Department | Reporting Department | Reporting Department | Reporting Department | | | | | | | | | | | | | | | | |
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| <p>Must be a PI and have Summit Financial Reporting Training or Summit Financial Reporting Access to be Granted this role</p> | | | | | | | | | | | | | | | | | | | |
| <p>Summit PI User</p> | Add Role | Remove Role | Summit Reporting Training Date | | | | | | | | | | | | | | | | |

| 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