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**	**Approval Department**

Supplier Requester Can Request New Suppliers	Add Role	Remove Role	Training Date

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PeopleSoft Financial Reporting and Budget Lookup	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	Reporting Department

Summit Finance Reporting	Add Role	Remove Role	Training Date

Select One Action:

Add Reporting Department(s)

Remove Reporting Department

Enter one or more department(s)

Reporting Department	Reporting Department	Reporting Department	Reporting Department

Summit Asset Management Dashboard (Secured by DeptID)	Add Role	Remove Role	Training Date

Select One Action:

Add Custodial Department(s)

Remove Custodial Department(s)

Enter one or more department(s)

Custodian Department	Custodian Department	Custodian Department	Custodian Department

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

Supervisor Name   Supervisor Signature   Date of Approval

Controller Name   Controller Signature   Date of Approval