



## University of Massachusetts Amherst Financial Data - Access Request Form

<b>Name</b>		<b>Employee ID</b>
<b>Dept Name</b>	<b>Campus Address</b>	
<b>Email Address</b>		<b>Dept Phone</b>
<p>UMass Employee <input type="checkbox"/> Student Employee <input type="checkbox"/> Consultant or Temporary* <input type="checkbox"/></p> <p>I have access but have changed departments <input type="checkbox"/> I have never had access <input type="checkbox"/></p> <p><small>*You must have both a Spire ID and an HR employee id to access Financial Systems</small></p> <p>I have completed enrollment in Duo multifactor authentication ( See <a href="http://multifactor.umass.edu">multifactor.umass.edu</a> for details): <input type="checkbox"/></p>		

Job Function/Role	Add	Delete	Requirements	Date of Training
<b>BUYWAYS (Shopper)</b>	<input type="checkbox"/>	<input type="checkbox"/>		
REQUISITION ENTRY	<input type="checkbox"/>	<input type="checkbox"/>	UPST Training	
REQUISITION APPROVER	<input type="checkbox"/>	<input type="checkbox"/>	Cannot be a Receiver	
INVOICE APPROVER	<input type="checkbox"/>	<input type="checkbox"/>		
PO RECEIVER	<input type="checkbox"/>	<input type="checkbox"/>	Cannot be an Approver	
INQUIRY	<input type="checkbox"/>	<input type="checkbox"/>		
PROCARD USER	<input type="checkbox"/>	<input type="checkbox"/>	UPST Training	
PROCARD APPROVER	<input type="checkbox"/>	<input type="checkbox"/>	UPST Training	
<b>List the EXE, MBU, ADPT or individual department id(s) for requisition workflow approval</b>				
<b>PEOPLESOFT</b>				
PROCARD REALLOCATOR	<input type="checkbox"/>	<input type="checkbox"/>	UPST Training	
TRAVEL AND EXPENSES	<input type="checkbox"/>	<input type="checkbox"/>	UPST Training	
JOURNAL ENTRY	<input type="checkbox"/>	<input type="checkbox"/>	Training Mandatory	
DECENTRAL BUDGET TRANSFER	<input type="checkbox"/>	<input type="checkbox"/>	Training Mandatory	
FINANCIALS INQUIRY (incl. Summit) Summit dashboards incl. <ul style="list-style-type: none"> <li>• Department Management</li> <li>• Grant Admin</li> <li>• Balance Sheet</li> <li>• Fiscal Reporting</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>		
Additional Job Function/Role(s):				
<b>SUMMIT</b>				
<ul style="list-style-type: none"> <li>• PI</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>		
Indicate additional Summit dashboard(s):				

<b>List the EXE, MBU, ADPT or individual department id(s) to access for Procard Reallocation, Reporting and/or Summit</b>

I understand and will abide by all applicable University Acceptable Data Use policies, including the following:

- Amherst Campus Acceptable Use Policy (<https://www.umass.edu/it/security/acceptable-use-policy>)
- Board of Trustees Use Policies (<https://www.umassp.edu/bot/policies>)
- UPST Purchasing Policy (<https://upst.umassp.edu/s/>)

If the Amherst Campus File Custodian has additional policies for usage of the data, I will abide by those policies. I also understand that any logon id/passwords I use to access University data is confidential, should not be shared, and that I am responsible for creating secure passwords. If this form is submitted electronically by my department head\*\*\*, my name, entered below, indicates I have read this statement.

**Requestor's Signature:** \_\_\_\_\_ **Date** \_\_\_\_\_

**Department Approval**

I authorize the above-named employee to have Finance access for the purposes of fulfilling his or her job responsibilities. **In the event the individual leaves the employ of my department, I understand that I must promptly notify A&F IT Systems so the access can be terminated immediately.**

Authorized and Approved by: \_\_\_\_\_ **Date:** \_\_\_\_\_  
**(Department Head Signature ( name if sending electronically\*\*\*))**

\*\*\* Signature is not required if the Security Form is forwarded electronically by Department Head; if offline signature delegation has been filed with the Controller's Office, that person may sign or forward in lieu of department head.

**Completed Requests should be sent to Security Administrator, Administrative Systems, 150 Whitmore  
or emailed to [afsecurity@umass.edu](mailto:afsecurity@umass.edu)**