

UMassAmherst ACCESS REQUEST FORM – FINANCE, SUMMIT, BUYWAYS

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

Add	Job Function/Role	Description	Additional Requirements
BUYWAYS			
<input type="checkbox"/>	SHOPPER	Users can shop catalogs, build carts, use BankCard form to create a cart to upload BankCard statements. All carts need to be assigned to a Requisitioner to submit to workflow.	See BANKCARD USER below for additional requirement if uploading statements
<input type="checkbox"/>	REQUISITION ENTRY	Users can shop catalogs, build carts and submit carts into workflow. Cart submission includes their own and carts assigned to them by shoppers. Includes Contract Requestor, Supplier Invite and BankCard User	Training required before role can be granted (https://www.umassp.edu/upst/training-information-sessions to register) See BANKCARD USER below for additional requirement if uploading statements
<input type="checkbox"/>	REQUISITION APPROVER	Ability to review, return, or approve requisition. Approval is based on department id for requisitions. Includes BankCard Statement Approver	Delegation form for each department manager/PI associated with the department list below must be on file with Controllers Office (https://www.umass.edu/controller/) See BANKCARD STATEMENT APPROVER below for additional requirement if uploading statements
<i>List the EXE, MBU, ADPT or individual department id(s) requesting BuyWays approval for</i>			
<input type="checkbox"/>	BANKCARD STATEMENT APPROVER	Ability to approve submitted BankCard statements and receipts	BankCard approval must be set up by UPST to complete the access. After the role is added, the requestor will be notified to email upst@umassp.edu
<input type="checkbox"/>	BANKCARD USER	Ability to use BankCard form to create a requisition to upload BankCard statements and receipts.	BankCard approval must be set up by UPST to complete the access. After the role is added, the requestor will be notified to email upst@umassp.edu
<input type="checkbox"/>	CONTRACT REQUESTOR	Create contract requests through the Contract Request menu.	

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Add	Job Function/Role	Description	Additional Requirements
<input type="checkbox"/>	INQUIRY	Inquiry to BuyWays.	
<input type="checkbox"/>	INVOICE APPROVER	Ability to approve invoices that are entered into BuyWays	Invoice approval must be set up by UPST to complete the access. After the role is added, the requestor will be notified to email upst@umassp.edu
<input type="checkbox"/>	PO RECEIVER	Ability to received purchase orders	
<input type="checkbox"/>	SUPPLIER REQUESTOR	Ability to invite new suppliers to register in BuyWays	
PEOPLESOFT FINANCE			
<input type="checkbox"/>	BANKCARD REALLOCATOR	Ability to reallocate BankCard charges within the department ids listed below and upload receipts on the reallocation transaction	Reallocators must be added to cards by UPST to complete the access. After the role is added, the requestor will be notified to email upst@umassp.edu
<input type="checkbox"/>	TRAVEL AND EXPENSES	Ability to create Expense reports. Includes access to Terradotta Travel Registry for travel authorizations	Training required before role can be granted (https://www.umassp.edu/upst/training-information-sessions to register) After the role is added, the requestor will be notified to email travel02@umass.edu with the list of employees creating expense reports for
<input type="checkbox"/>	JOURNAL ENTRY	Ability to create and submit journal entries into workflow	Training required before the role can be granted. Contact Controllers Office
<input type="checkbox"/>	DECENTRAL BUDGET TRANSFER	Ability to create budget entries.	EFO approval required.
<input type="checkbox"/>	FINANCIALS INQUIRY & REPORTING	Ability to inquire on AP, PO, GL, Grants and budget data. Run reports including queries. <i>The role includes access to Summit Department Admin dashboard.</i>	
SUMMIT			
<input type="checkbox"/>	DEPARTMENT ADMIN	Includes Activity (Budget, Fund, Sponsored), Transaction Detail, Balance Sheet, Fiscal Reporting. (Separate role for PI Dashboard no longer needed)	
<input type="checkbox"/>	FINANCIAL PLANNING	Revenue & Expense reports, Budget reports, Payroll reports, Project/Grant reports.	
<input type="checkbox"/>	OTHER – please list		
<i>List the EXE, MBU, ADPT or individual department id(s) to access for Procard Reallocation, Travel Registry, Reporting and/or Summit</i>			

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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://www.umassp.edu/upst/purchasing-payment-services>)

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 via email 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 so the access can be terminated immediately.**

Authorized and Approved by: _____ **Date:** _____
(Department Head Signature (Also printed name if sending electronically*))**

*** Signature is not required if the Security Form is forwarded via email by Department Head; if 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 emailed to afsecurity@umass.edu

(If gathering signatures via a Docusign envelope please do not send to afsecurity@umass.edu as the last step as the document does not come through as an attachment. Please download from Docusign and email separately)