

UMassAmherst ACCESS REQUEST FORM – FINANCE, SUMMIT, BUYWAYS, CONCUR

Name		Employee ID
Dept Name	Campus Address	
Email Address		Dept Phone
UMass Employee <input type="checkbox"/> Grad Student Employee <input type="checkbox"/> Undergrad 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 these Financial Systems</small>		
I have access but have changed departments* <input type="checkbox"/> I have never had access <input type="checkbox"/>		
<small>If you need to retain access to your prior department, the prior department's department head should submit a request to afsecurity@umass.edu to retain the access and indicate when it should be removed. Otherwise access is removed based on the new access request</small>		

Add	Job Function/Role	Description	Additional Requirements
BUYWAYS			
<input type="checkbox"/>	CONTRACT APPROVER	Contract approvers are added in the contract request process and complete the final approval before the executed contract is signed. However, they cannot approve unless they have this role.	If needed, a delegation form for the person must be on file with Controllers Office (https://www.umass.edu/controller/)
<input type="checkbox"/>	CONTRACT REQUESTOR	Create contract requests through the Contract Request menu.	
<input type="checkbox"/>	INQUIRY	Ability to invite new suppliers to register in BuyWays	Inquiry to BuyWays.
<input type="checkbox"/>	INVOICE APPROVER	Ability to approve Invoices entered in Buyways	Invoice approval rules are set up by UPST for department specific invoice approval workflow. This grants the role <i>only</i> .
<input type="checkbox"/>	RECEIVER	Ability to receive Purchase Orders	Cannot be an Approver
<input type="checkbox"/>	REQUISITION APPROVER	Ability to review, return, or approve requisitions and contract requests. Approval is based on THE department id(s) used on requisitions.	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/)
<i>List the EXE, MBU, ADPT or individual department id(s) requesting BuyWays approval for Delegation form for each department manager/PI associated with the department list below must be on file with Controllers Office</i> (https://www.umass.edu/controller/)			
<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. This role includes Contract Requestor, Supplier Requestor, Inquiry, Invoice Approval	Training required before role can be granted (https://www.umassp.edu/upst/training-information-sessions) to register) NOTE: If a requisitioner should not be approving invoices as the "PO Owner", make sure that "prepared for" field is appropriately updated at the time of requisition entry to the appropriate person.

UMassAmherst ACCESS REQUEST FORM – FINANCE, SUMMIT, BUYWAYS, CONCUR

<input type="checkbox"/>	SHOPPER	Users can shop catalogs, build carts. All carts need to be assigned to a Requisitioner to submit to workflow.	
<input type="checkbox"/>	SUPPLIER REQUESTOR	Access to request new supplier or change to existing supplier	
PEOPLESOFT FINANCE			
<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>	
CONCUR			
<input type="checkbox"/>	USER	Self Service to Concur for expense reports (travel and bankcard)	The supervisor to be populated will be the HR Direct supervisor. If that position is vacant or the requestor of access is a graduate student, indicate an alternate supervisor name and emplid:
<input type="checkbox"/>	APPROVER	Delegated approver for an employee. REQUESTOR MUST ACKNOWLEDGE THE STATEMENT BELOW IN ORDER TO BE GRANTED THE ROLE	The employee who is delegating their approval must do so in Concur. When a delegated approver, you have access to approval for all speedtypes and/or all staff supervised by the employee delegating the approval.

I acknowledge that Delegation of approval authority should not create a situation where an employee is approving the expenses of their supervisor or another employee of equal or higher position.

Initials _____

UMassAmherst ACCESS REQUEST FORM – FINANCE, SUMMIT, BUYWAYS, CONCUR

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 Summit</i>			

UMassAmherst ACCESS REQUEST FORM – FINANCE, SUMMIT, BUYWAYS, CONCUR

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?policy-title=&subject=446>)
- 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 and enrolling in multifactor authentication.

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: _____

Completed Requests should be emailed to afsecurity@umass.edu

When signing this form via DocuSign, please do not send to afsecurity@umass.edu directly from DocuSign as the document does not come through as an attachment. Please download the completed form from DocuSign and email separately