

## UML ACCESS REQUEST FORM EXAMPLES

This document is intended to supplement the Access Request Form Job Aid, in providing some, not all, of the most common examples of how to complete the Access Request.

Includes instructions and related links for the most common inquiries, and oversights.

### **IMPORTANT:**

The budget office is not responsible for access related to HRDirect.

Completing the Budget & SUMMIT Access Request form will not provide you access to enter/approve timesheets or enter/approve ePAFs, Contact payroll@uml.edu

**Access request form link** <https://www.uml.edu/empac/Financial-Access-Login/>

**Form workflow:** Requestor -> Supervisor or Department Manager -> Budget Office -> IT -> Returned to requestor marked "Completed".

**Please use the EMPLOYEE ID on this form** - A frequent mistake is using an Employees Student ID, the **form will not be processed** if it does not include **a valid EMPL ID** (begins with 1 not 0, can be found on the paystub or timesheet).

**Status of an Access Request Form** - CONTACT the I.T. Department IF YOU NEED TO INQUIRE ON THE STATUS OF YOUR FORM <https://www.uml.edu/it/contact.aspx>, the Budget Office does not have this information.

**Finance Production Login Link** - <https://www.uml.edu/empac/> - This is where Expense Reports are entered, BuyWays/Summit.

**UPST Job Aids** - <https://www.umassp.edu/upst/upst-resources> - Once your form is completed you can go here to learn how to enter Expense Reports or reallocate a Procard expense.

**UPST Training Sessions** - <https://www.umassp.edu/upst/training-information-sessions> - Sign up for a training session if you are not finding the above Job Aids helpful.

**Additional resources** are available in the "Information for Admins" folder in OneDrive.uml.edu, this is not a public folder, contact: [Budget\\_Office@uml.edu](mailto:Budget_Office@uml.edu) to request access or contact an admin within your department. Noting, access to this folder will **NOT** be granted to a student employee or to TA/RA's.

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**A. Expense Reports/Travel Reimbursements: For themselves**

Example:

If the user only needs access to enter Expense Reports/Travel Reimbursements for **themselves**,

*Default roles include Expense Report Self-Service Access and Procard Reallocation, but there are more steps to be a Procard reallocator – see also 6. Procard Reallocation Info.docx.*

For most users, the Default PeopleSoft & Summit roles will be sufficient.

<b>Access Request Information:</b>	
Access Needed For Name:	EMPL ID: Employee Email:
<b>Type of Request: Please Select One</b> <span style="float: right;">Do Not Use Student Email Address</span>	
<input type="radio"/> New Access Request	<input type="radio"/> Modification to existing access
<b>Job Type: Please Select One Position Level Within UML</b>	
<input type="radio"/> Vice Chancellor – LEXE	<input type="radio"/> Faculty Start-Up Project Team Member Only
<input type="radio"/> Associate Vice Chancellor / Dean – LDIV	<input type="checkbox"/> PI – Individual Dept. ID's
<input type="radio"/> Dean Administrator – LDIV	<input type="checkbox"/> Add to ORA FIN Reports
<input type="radio"/> Department Administrator - LDEP	<input type="radio"/> Other: (i.e. RA/TA)
<input type="radio"/> Director / Chair – LDEP Replacing Current Chair: _____	<b>Attachment Option for additional details, and/or instructions.</b>
<b>PeopleSoft / Summit Default Roles: Please Select One (Type of access being requested)</b>	
<input type="radio"/> Default Roles (PeopleSoft / Summit Inquiry & Reporting)	<input type="radio"/> Other Roles (If Known): _____
<input type="radio"/> No Roles Needed / No Change in Roles	<b>Attachment Option for additional details, and/or instructions.</b>
<input type="radio"/> Expense Approver (Other: FS_EX Approver): Dept: ID: _____ <small>Required: Contact <a href="mailto:Budget-Office@UML.EDU">Budget-Office@UML.EDU</a> when form is completed (Employee will require CFLAST ID and FS_EX Approver Role).</small>	
<b>PeopleSoft / Summit Department Security: Please Select One (Level of access being assigned)</b>	
<input type="radio"/> *Executive Level, Division Level or Department Level user	<input type="radio"/> Specific Individual Department ID's: <i>List of specific Financial Departments user should have view access</i>
<input type="radio"/> Executive Level: LEXExxxxx	1. _____
<input type="radio"/> Division Level: LDIVxxxxx	2. _____
<input type="radio"/> Department Level: LDEPxxxxx	3. _____
<input type="radio"/> No Department Security Required / No Change in Department Security	<b>Attachment Option for additional details, and/or instructions.</b>
<input type="radio"/> Other: Specify _____	
<b>BuyWay Roles: Please Select One (Role to be assigned) A Requisitioner cannot be an Approver, the only exception is the PI Role.</b>	
<input type="radio"/> <b>Shopper:</b> Creates shopping charts and submits to Requisitioner for processing (Shopper Role cannot be mixed with Procard/BankCard user or Requisitioner Roles)	<input type="radio"/> <b>Requisitioner:</b> Approves shopping charts up to \$2,500 and submits cart for Departmental Approval. (Requisitioner Role cannot be mixed with the Shopper Role)
<input type="radio"/> <b>Approver:</b> Approves Requisitions & Invoice for Dept. ID's 1. _____ 2. _____ 3. _____	<input type="radio"/> <b>Other Roles Request:</b> (i.e. Supplier Invite, Invoice Approver, Contract Requestor, etc...) 1. _____ 2. _____ 3. _____
<input type="radio"/> <b>BankCard (Procard) Roles:</b> <input type="radio"/> BankCard User (Not needed if Employee has Requisition Role) <input type="radio"/> BankCard Approver with Edit (Not needed if Employee has Requisitioner Approver Role) <input type="radio"/> BankCard Approver without Edit (Not needed if Employee has Requisition Approver)	<input type="radio"/> <b>PI Role:</b> Requisition & Invoice Approver for Dept. ID's 1. _____ 2. _____ 3. _____
<input type="radio"/> No Change in BuyWays Security / No Change in Roles	<b>Attachment Option for additional details, and/or instructions.</b>
<b>Request Made By:</b>	<b>Manager / Supervisor Approval:</b>

## B. BuyWays Shopper Role

Example:

If the user only needs access to BuyWays as a Shopper.

<b>Access Request Information:</b>	
Access Needed For Name: <input type="text"/>	EMPL ID: <input type="text"/> Employee Email: <input type="text"/>
<b>Type of Request: Please Select One</b> <span style="float: right;"><b>Do Not Use Student Email Address</b></span>	
<input type="radio"/> New Access Request	<input type="radio"/> Modification to existing access
<b>Job Type: Please Select One Position Level Within UML</b>	
<input type="radio"/> Vice Chancellor – LEXE	<input type="radio"/> Faculty Start-Up Project Team Member Only
<input type="radio"/> Associate Vice Chancellor / Dean – LDIV	<input type="checkbox"/> PI – Individual Dept. ID's
<input type="radio"/> Dean Administrator – LDIV	<input type="checkbox"/> Add to ORA FIN Reports
<input type="radio"/> Department Administrator - LDEP	<input type="radio"/> Other: (i.e. RA/TA)
<input type="radio"/> Director / Chair – LDEP Replacing Current Chair: _____	<b>Attachment Option for additional details, and/or instructions.</b>
<b>PeopleSoft / Summit Default Roles: Please Select One (Type of access being requested)</b>	
<input type="radio"/> Default Roles (PeopleSoft / Summit Inquiry & Reporting)	<input type="radio"/> Other Roles (If Known): _____
<input type="radio"/> <b>No Roles Needed / No Change in Roles</b>	<b>Attachment Option for additional details, and/or instructions.</b>
<input type="radio"/> Expense Approver (Other: FS_EX Approver): Dept: ID: _____ <small>Required: Contact <a href="mailto:Budget-Office@UML.EDU">Budget-Office@UML.EDU</a> when form is completed (Employee will require CFAST ID and FS_EX Approver Role).</small>	
<b>PeopleSoft / Summit Department Security: Please Select One (Level of access being assigned)</b>	
*Executive Level, Division Level or Department Level user	<input type="radio"/> Specific Individual Department ID's: List of specific Financial Departments user should have view access
<input type="radio"/> Executive Level: LEXExxxxx	1. _____
<input type="radio"/> Division Level: LDIVxxxxxx	2. _____
<input type="radio"/> Department Level: LDEPxxxxxx	3. _____
<input type="radio"/> <b>No Department Security Required / No Change in Department Security</b>	<b>Attachment Option for additional details, and/or instructions.</b>
<input type="radio"/> Other: Specify _____	
<b>BuyWay Roles: Please Select One (Role to be assigned). A Requisitioner cannot be an Approver, the only exception is the PI Role.</b>	
<input type="radio"/> <b>Shopper: Creates shopping charts and submits to Requisitioner for processing (Shopper Role cannot be mixed with Procard/BankCard user or Requisitioner Roles)</b>	<input type="radio"/> <b>Requisitioner: Approves shopping charts up to \$2,500 and submits cart for Departmental Approval. (Requisitioner Role cannot be mixed with the Shopper Role)</b>
<input type="radio"/> <b>Approver: Approves Requisitions &amp; Invoice for Dept. ID's</b> 1. _____ 2. _____ 3. _____	<input type="radio"/> <b>Other Roles Request: (i.e. Supplier Invite, Invoice Approver, Contract Requestor, etc...).</b> 1. _____ 2. _____ 3. _____
<input type="radio"/> <b>BankCard (Procard) Roles:</b> <input type="radio"/> BankCard User (Not needed if Employee has Requisition Role) <input type="radio"/> BankCard Approver with Edit (Not needed if Employee has Requisitioner Approver Role) <input type="radio"/> BankCard Approver without Edit (Not needed if Employee has Requisition Approver)	<input type="radio"/> <b>PI Role: Requisition &amp; Invoice Approver for Dept. ID's</b> 1. _____ 2. _____ 3. _____
<input type="radio"/> No Change in BuyWays Security / No Change in Roles	<b>Attachment Option for additional details, and/or instructions.</b>
<b>Request Made By:</b>	<b>Manager / Supervisor Approval:</b>  <small>Optional</small>

### C. BuyWays Requisitioner Role - Faculty Start-Up

Example:

If the user is a faculty member with Faculty Start-Up funding.

<b>Access Request Information:</b>	
Access Needed For Name: _____	EMPL ID: _____ Employee Email: _____
<b>Type of Request: Please Select One</b> <span style="float: right;"><b>Do Not Use Student Email Address</b></span>	
<input type="radio"/> New Access Request	<input type="radio"/> Modification to existing access
<b>Job Type: Please Select One</b> Position Level Within UML	
<input type="radio"/> Vice Chancellor – LEXE <input type="radio"/> Associate Vice Chancellor / Dean – LDIV <input type="radio"/> Dean Administrator – LDIV <input type="radio"/> Department Administrator - LDEP <input type="radio"/> Director / Chair – LDEP Replacing Current Chair: _____	<input type="radio"/> Faculty Start-Up Project Team Member Only <input type="radio"/> PI – Individual Dept. ID's <input type="radio"/> Add to ORA FIN Reports <input type="radio"/> Other: (i.e. RA/TA) _____ Attachment Option for additional details, and/or instructions.
<b>PeopleSoft / Summit Default Roles: Please Select One</b> (Type of access being requested)	
<input type="radio"/> Default Roles (PeopleSoft / Summit Inquiry & Reporting) <input type="radio"/> No Roles Needed / No Change in Roles <input type="radio"/> Expense Approver (Other: FS_EX Approver): Dept: ID: _____ Required: Contact <a href="mailto:Budget-Office@UML.EDU">Budget-Office@UML.EDU</a> when form is completed (Employee will require CFLAST ID and FS_EX Approver Role)	<input type="radio"/> Other Roles (If Known): _____ Attachment Option for additional details, and/or instructions.
<b>PeopleSoft / Summit Department Security: Please Select One</b> (Level of access being assigned)	
*Executive Level, Division Level or Department Level user <input type="radio"/> Executive Level: LEXExxxxxx <input type="radio"/> Division Level: LDIVxxxxxx <input type="radio"/> Department Level: LDEPxxxxxx <input type="radio"/> No Department Security Required / No Change in Department Security <input type="radio"/> Other: Specify _____	<input type="radio"/> Specific Individual Department ID's: List of specific Financial Departments user should have view access 1. _____ 2. _____ 3. _____ Attachment Option for additional details, and/or instructions.
<b>BuyWay Roles: Please Select One</b> (Role to be assigned) <b>A Requisitioner cannot be an Approver; the only exception is the PI Role.</b>	
<input type="radio"/> Shopper: Creates shopping charts and submits to Requisitioner for processing (Shopper Role cannot be mixed with Procard/BankCard user or Requisitioner Roles) <input type="radio"/> Approver: Approves Requisitions & Invoice for Dept. ID's 1. _____ 2. _____ 3. _____ <input type="radio"/> BankCard (Procard) Roles: <input type="radio"/> BankCard User (Not needed if Employee has Requisition Role) <input type="radio"/> BankCard Approver with Edit (Not needed if Employee has Requisitioner Approver Role) <input type="radio"/> BankCard Approver without Edit (Not needed if Employee has Requisition Approver) <input type="radio"/> No Change in BuyWays Security / No Change in Roles	<input type="radio"/> Requisitioner: Approves shopping charts up to \$2,500 and submits cart for Departmental Approval. (Requisitioner Role cannot be mixed with the Shopper Role) <input type="radio"/> Other Roles Request: (i.e. Supplier Invite, Invoice Approver, Contract Requestor, etc...) 1. _____ 2. _____ 3. _____ <input type="radio"/> PI Role: Requisition & Invoice Approver for Dept. ID's 1. _____ 2. _____ 3. _____ Attachment Option for additional details, and/or instructions.
<b>Request Made By:</b> _____	<b>Manager / Supervisor Approval:</b> _____

### D. Access to Specific Department ID:

Example:

If the user already has the Default Roles and needs Department Security to individual Department ID's (example Plastics Engineering Dept ID).

Access Request Information:	
Access Needed For Name:	EMPL ID: Employee Email:
<b>Type of Request: Please Select One</b> <span style="float: right;"><b>Do Not Use Student Email Address</b></span>	
<input type="radio"/> New Access Request	<input type="radio"/> Modification to existing access
<b>Job Type: Please Select One</b> Position Level Within UML	
<input type="radio"/> Vice Chancellor – LEXE	<input type="radio"/> Faculty Start-Up Project Team Member Only
<input type="radio"/> Associate Vice Chancellor / Dean – LDIV	<input type="checkbox"/> PI – Individual Dept. ID's
<input type="radio"/> Dean Administrator – LDIV	<input type="checkbox"/> Add to ORA FIN Reports
<input type="radio"/> Department Administrator - LDEP	<input type="radio"/> Other: (i.e. RA/TA)
<input type="radio"/> Director / Chair – LDEP Replacing Current Chair: _____	<b>Attachment Option</b> for additional details, and/or instructions.
<b>PeopleSoft / Summit Default Roles: Please Select One</b> (Type of access being requested)	
<input type="radio"/> Default Roles (PeopleSoft / Summit Inquiry & Reporting)	<input type="radio"/> Other Roles (If Known): _____
<input type="radio"/> No Roles Needed / No Change in Roles	<b>Attachment Option</b> for additional details, and/or instructions.
<input type="radio"/> Expense Approver (Other: FS_EX Approver): Dept: ID: _____ <b>Required:</b> Contact <a href="mailto:Budget-Office@UML.EDU">Budget-Office@UML.EDU</a> when form is completed (Employee will require CFAST ID and FS_EX Approver Role).	
<b>PeopleSoft / Summit Department Security: Please Select One</b> (Level of access being assigned)	
<input type="radio"/> *Executive Level, Division Level or Department Level user	<input type="radio"/> Specific Individual Department ID's: List of specific Financial Departments user should have view access
<input type="radio"/> Executive Level: LEXExxxxxx	1. <u>L610600000</u>
<input type="radio"/> Division Level: LDIVxxxxxx	2. _____
<input type="radio"/> Department Level: LDEPxxxxxx	3. _____
<input type="radio"/> No Department Security Required / No Change in Department Security	<b>Attachment Option</b> for additional details, and/or instructions.
<input type="radio"/> Other: Specify _____	
<b>BuyWay Roles: Please Select One</b> (Role to be assigned) <b>A Requisitioner cannot be an Approver, the only exception is the PI Role.</b>	
<input type="radio"/> Shopper: Creates shopping charts and submits to Requisitioner for processing (Shopper Role cannot be mixed with Procard/BankCard user or Requisitioner Roles)	<input type="radio"/> Requisitioner: Approves shopping charts up to \$2,500 and submits cart for Departmental Approval. (Requisitioner Role cannot be mixed with the Shopper Role)
<input type="radio"/> Approver: Approves Requisitions & Invoice for Dept. ID's 1. _____ 2. _____ 3. _____	<input type="radio"/> Other Roles Request: (i.e. Supplier Invite, Invoice Approver, Contract Requestor, etc...) 1. _____ 2. _____ 3. _____
<input type="radio"/> BankCard (Procard) Roles: <input type="radio"/> BankCard User (Not needed if Employee has Requisition Role) <input type="radio"/> BankCard Approver with Edit (Not needed if Employee has Requisitioner Approver Role) <input type="radio"/> BankCard Approver without Edit (Not needed if Employee has Requisition Approver)	<input type="radio"/> PI Role: Requisition & Invoice Approver for Dept. ID's 1. _____ 2. _____ 3. _____
<input type="radio"/> No Change in BuyWays Security / No Change in Roles	<b>Attachment Option</b> for additional details, and/or instructions.
Request Made By: _____	Manager / Supervisor Approval:  Optional

**E. Access to entire Department Node:**

If the user already has the Default Roles and needs access to an entire Department Node (example: Access to all Plastics Engineering, Node LDEP, or all the College Engineering, Node LDIV) See the 2 examples below.

Example:

Department Node Level Access

<b>Access Request Information:</b>	
Access Needed For Name:	EMPL ID: Employee Email:
<b>Type of Request: Please Select One</b> <span style="float: right;">Do Not Use Student Email Address</span>	
<input type="radio"/> New Access Request	<input type="radio"/> Modification to existing access
<b>Job Type: Please Select One Position Level Within UML</b>	
<input type="radio"/> Vice Chancellor – LEXE <input type="radio"/> Associate Vice Chancellor / Dean – LDIV <input type="radio"/> Dean Administrator – LDIV <input type="radio"/> Department Administrator - LDEP <input type="radio"/> Director / Chair – LDEP Replacing Current Chair: _____	<input type="radio"/> Faculty Start-Up Project Team Member Only <input type="checkbox"/> PI – Individual Dept. ID's <input type="checkbox"/> Add to ORA FIN Reports <input type="radio"/> Other: (i.e. RA/TA) _____
<b>Attachment Option for additional details, and/or instructions.</b>	
<b>PeopleSoft / Summit Default Roles: Please Select One (Type of access being requested)</b>	
<input type="radio"/> Default Roles (PeopleSoft / Summit Inquiry & Reporting) <input type="radio"/> No Roles Needed / No Change in Roles <input type="radio"/> Expense Approver (Other: FS_EX Approver): Dept: ID: _____ Required: Contact <a href="mailto:Budget-Office@UML.EDU">Budget-Office@UML.EDU</a> when form is completed (Employee will require CFLAST ID and FS_EX Approver Role).	<input type="radio"/> Other Roles (If Known): _____
<b>Attachment Option for additional details, and/or instructions.</b>	
<b>PeopleSoft / Summit Department Security: Please Select One (Level of access being assigned)</b>	
<input type="radio"/> *Executive Level, Division Level or Department Level user <input type="radio"/> Executive Level: LEXExxxxx <input type="radio"/> Division Level: LDIVxxxxxx <input type="radio"/> Department Level: LDEPxxxxxx <b>LDEP601006</b> <input type="radio"/> No Department Security Required / No Change in Department Security <input type="radio"/> Other: Specify _____	<input type="radio"/> Specific Individual Department ID's: List of specific Financial Departments user should have view access 1. _____ 2. _____ 3. _____
<b>Attachment Option for additional details, and/or instructions.</b>	
<b>BuyWay Roles: Please Select One (Role to be assigned) A Requisitioner cannot be an Approver, the only exception is the PI Role.</b>	
<input type="radio"/> Shopper: Creates shopping charts and submits to Requisitioner for processing (Shopper Role cannot be mixed with Procard/BankCard user or Requisitioner Roles) <input type="radio"/> Approver: Approves Requisitions & Invoice for Dept. ID's 1. _____ 2. _____ 3. _____ <input type="radio"/> BankCard (Procard) Roles: <input type="radio"/> BankCard User (Not needed if Employee has Requisition Role) <input type="radio"/> BankCard Approver with Edit (Not needed if Employee has Requisitioner Approver Role) <input type="radio"/> BankCard Approver without Edit (Not needed if Employee has Requisition Approver)	<input type="radio"/> Requisitioner: Approves shopping charts up to \$2,500 and submits cart for Departmental Approval. (Requisitioner Role cannot be mixed with the Shopper Role) <input type="radio"/> Other Roles Request: (i.e. Supplier Invite, Invoice Approver, Contract Requestor, etc...) 1. _____ 2. _____ 3. _____ <input type="radio"/> PI Role: Requisition & Invoice Approver for Dept. ID's 1. _____ 2. _____ 3. _____
<b>Attachment Option for additional details, and/or instructions.</b>	
<input type="radio"/> No Change in BuyWays Security / No Change in Roles	 Optional
<b>Request Made By:</b>	<b>Manager / Supervisor Approval:</b>

**F. Expense Report:**

Approval Example:

If the user needs Access to approve Expense Reports for specific Department IDs, the full list of Department IDs should be sent to Budget\_Office@uml.edu after the form has been marked completed

<b>Access Request Information:</b>	
Access Needed For Name:	EMPL ID: Employee Email:
<b>Type of Request: Please Select One</b> <span style="float: right;">Do Not Use Student Email Address</span>	
<input type="radio"/> New Access Request	<input type="radio"/> Modification to existing access
<b>Job Type: Please Select One Position Level Within UML</b>	
<input type="radio"/> Vice Chancellor – LEXE	<input type="checkbox"/> Faculty Start-Up Project Team Member Only
<input type="radio"/> Associate Vice Chancellor / Dean – LDIV	<input type="checkbox"/> PI – Individual Dept. ID's
<input type="radio"/> Dean Administrator – LDIV	<input type="checkbox"/> Add to ORA FIN Reports
<input type="radio"/> Department Administrator - LDEP	<input type="radio"/> Other: (i.e. RA/TA)
<input type="radio"/> Director / Chair – LDEP Replacing Current Chair: _____	<b>Attachment Option</b> for additional details, and/or instructions.
<b>PeopleSoft / Summit Default Roles: Please Select One (Type of access being requested)</b>	
<input type="radio"/> Default Roles (PeopleSoft / Summit Inquiry & Reporting)	<input type="radio"/> Other Roles (If Known): _____
<input type="radio"/> No Roles Needed / No Change in Roles	
<input type="radio"/> Expense Approver (Other: FS_EX Approver): Dept: ID: <u>L600630100</u>	<b>Attachment Option</b> for additional details, and/or instructions.
<small>Required: Contact Budget Office@uml.edu when form is completed (Employee will require CFAST ID and FS_EX Approver Role).</small>	
<b>PeopleSoft / Summit Department Security: Please Select One (Level of access being assigned)</b>	
<input type="radio"/> *Executive Level, Division Level or Department Level user	<input type="radio"/> Specific Individual Department ID's: List of specific Financial Departments user should have view access
<input type="radio"/> Executive Level: LEXExxxxxx	1 _____
<input type="radio"/> Division Level: LDIVxxxxxx	2 _____
<input type="radio"/> Department Level: LDEPxxxxxx	3 _____
<input type="radio"/> No Department Security Required / No Change in Department Security	<b>Attachment Option</b> for additional details, and/or instructions.
<input type="radio"/> Other: Specify _____	
<b>BuyWay Roles: Please Select One (Role to be assigned) A Requisitioner cannot be an Approver, the only exception is the PI Role.</b>	
<input type="radio"/> Shopper: Creates shopping charts and submits to Requisitioner for processing (Shopper Role cannot be mixed with Procard/BankCard user or Requisitioner Roles)	<input type="radio"/> Requisitioner: Approves shopping charts up to \$2,500 and submits cart for Departmental Approval. (Requisitioner Role cannot be mixed with the Shopper Role)
<input type="radio"/> Approver: Approves Requisitions & Invoice for Dept. ID's 1. _____ 2. _____ 3. _____	<input type="radio"/> Other Roles Request: (i.e. Supplier Invite, Invoice Approver, Contract Requestor, etc...) 1. _____ 2. _____ 3. _____
<input type="radio"/> BankCard (Procard) Roles: <input type="radio"/> BankCard User (Not needed if Employee has Requisition Role) <input type="radio"/> BankCard Approver with Edit (Not needed if Employee has Requisitioner Approver Role) <input type="radio"/> BankCard Approver without Edit (Not needed if Employee has Requisition Approver)	<input type="radio"/> PI Role: Requisition & Invoice Approver for Dept. ID's 1. _____ 2. _____ 3. _____
<input type="radio"/> No Change in BuyWays Security / No Change in Roles	<b>Attachment Option</b> for additional details, and/or instructions.
Request Made By:	Manager / Supervisor Approval: 

**G. New Access needing Procard Reallocator Role**

Example:

If the user is new and does not have any access to PeopleSoft Finance, and they will also be a Procard Reallocator, the Reallocator Role is included in the Default Roles, however, the user will also need Read/Write Department ID Security (*also see the OneDrive Information for Admins folder/ 6. Procard Reallocation*).

<b>Access Request Information:</b>	
Access Needed For Name:	EMPL ID: Employee Email:
<b>Type of Request: Please Select One</b> <span style="float: right;">Do Not Use Student Email Address</span>	
<input type="radio"/> New Access Request	<input type="radio"/> Modification to existing access
<b>Job Type: Please Select One Position Level Within UML</b>	
<input type="radio"/> Vice Chancellor – LEXE <input type="radio"/> Associate Vice Chancellor / Dean – LDIV <input type="radio"/> Dean Administrator – LDIV <input type="radio"/> Department Administrator - LDEP <input type="radio"/> Director / Chair – LDEP Replacing Current Chair: _____	<input type="radio"/> Faculty Start-Up Project Team Member Only <input type="checkbox"/> PI – Individual Dept. ID's <input type="checkbox"/> Add to ORA FIN Reports <input checked="" type="radio"/> Other: (i.e. RA/TA) <u>read/write procard reallocation</u> Attachment Option for additional details, and/or instructions.
<b>PeopleSoft / Summit Default Roles: Please Select One (Type of access being requested)</b>	
<input checked="" type="radio"/> Default Roles (PeopleSoft / Summit Inquiry & Reporting)	<input type="radio"/> Other Roles (If Known): _____
<input type="radio"/> No Roles Needed / No Change in Roles <input type="radio"/> Expense Approver (Other: FS_EX Approver): Dept: ID: _____ Required: Contact <a href="mailto:Budget-Office@UML.EDU">Budget-Office@UML.EDU</a> when form is completed (Employee will require CFLAST ID and FS_EX Approver Role).	Attachment Option for additional details, and/or instructions.
<b>PeopleSoft / Summit Department Security: Please Select One (Level of access being assigned)</b>	
<input type="radio"/> *Executive Level, Division Level or Department Level user <input type="radio"/> Executive Level: LEXExxxxx <input type="radio"/> Division Level: LDIVxxxxxx <input type="radio"/> Department Level: LDEPxxxxxx <input type="radio"/> No Department Security Required / No Change in Department Security <input type="radio"/> Other: Specify _____	<input type="radio"/> Specific Individual Department ID's: List of specific Financial Departments user should have view access 1 <u>L610500000</u> 2 _____ 3 _____ Attachment Option for additional details, and/or instructions.
<b>BuyWay Roles: Please Select One (Role to be assigned) A Requisitioner cannot be an Approver, the only exception is the PI Role.</b>	
<input type="radio"/> Shopper: Creates shopping charts and submits to Requisitioner for processing (Shopper Role cannot be mixed with Procard/BankCard user or Requisitioner Roles) <input type="radio"/> Approver: Approves Requisitions & Invoice for Dept. ID's 1. _____ 2. _____ 3. _____ <input type="radio"/> BankCard (Procard) Roles: <input type="radio"/> BankCard User (Not needed if Employee has Requisition Role) <input type="radio"/> BankCard Approver with Edit (Not needed if Employee has Requisitioner Approver Role) <input type="radio"/> BankCard Approver without Edit (Not needed if Employee has Requisition Approver)	<input type="radio"/> Requisitioner: Approves shopping charts up to \$2,500 and submits cart for Departmental Approval. (Requisitioner Role cannot be mixed with the Shopper Role) <input type="radio"/> Other Roles Request: (i.e. Supplier Invite, Invoice Approver, Contract Requestor, etc...) 1. _____ 2. _____ 3. _____ <input type="radio"/> PI Role: Requisition & Invoice Approver for Dept. ID's 1. _____ 2. _____ 3. _____ Attachment Option for additional details, and/or instructions.
<input checked="" type="radio"/> No Change in BuyWays Security / No Change in Roles	
Request Made By: _____	Manager / Supervisor Approval: 

## H. Procard Reallocate by Department ID:

Example:

If the user already has the Default Roles but needs Read/Write Access to certain Department IDs to reallocate Procard expenses (also see the OneDrive Information for Admins folder/ 6. Procard Reallocation).

<b>Access Request Information:</b>	
Access Needed For Name:	EMPL ID: Employee Email:
<b>Type of Request: Please Select One</b> Do Not Use Student Email Address	
<input type="radio"/> New Access Request	<input type="radio"/> Modification to existing access
<b>Job Type: Please Select One Position Level Within UML</b>	
<input type="radio"/> Vice Chancellor – LEXE	<input type="radio"/> Faculty Start-Up Project Team Member Only
<input type="radio"/> Associate Vice Chancellor / Dean – LDIV	<input type="checkbox"/> PI – Individual Dept. ID's
<input type="radio"/> Dean Administrator – LDIV	<input type="checkbox"/> Add to ORA FIN Reports
<input type="radio"/> Department Administrator - LDEP	<input checked="" type="radio"/> Other: (i.e. RA/TA)
<input type="radio"/> Director / Chair – LDEP	<b>read/write procard reallocation</b>
Replacing Current Chair: _____	<b>Attachment Option for additional details, and/or instructions.</b>
<b>PeopleSoft / Summit Default Roles: Please Select One (Type of access being requested)</b>	
<input type="radio"/> Default Roles (PeopleSoft / Summit Inquiry & Reporting)	<input type="radio"/> Other Roles (If Known):
<input checked="" type="radio"/> No Roles Needed / No Change in Roles	
<input type="radio"/> Expense Approver (Other: FS_EX Approver):	<b>Attachment Option for additional details, and/or instructions.</b>
Dept: ID: _____	
<b>Required:</b> Contact <a href="mailto:Budget-Office@UML.EDU">Budget-Office@UML.EDU</a> when form is completed (Employee will require CFLAST ID and FS_EX Approver Role).	
<b>PeopleSoft / Summit Department Security: Please Select One (Level of access being assigned)</b>	
<input type="radio"/> *Executive Level, Division Level or Department Level user	<input checked="" type="radio"/> Specific Individual Department ID's:
<input type="radio"/> Executive Level: LEXExxxxx	List of specific Financial Departments user should have view access
<input type="radio"/> Division Level: LDIVxxxxxx	1 <u>L720400196</u>
<input type="radio"/> Department Level: LDEPxxxxxx	2 _____
<input type="radio"/> No Department Security Required / No Change in Department Security	3 _____
<input type="radio"/> Other: Specify _____	<b>Attachment Option for additional details, and/or instructions.</b>
<b>BuyWay Roles: Please Select One (Role to be assigned) A Requisitioner cannot be an Approver, the only exception is the PI Role.</b>	
<input type="radio"/> Shopper: Creates shopping charts and submits to Requisitioner for processing (Shopper Role cannot be mixed with Procard/BankCard user or Requisitioner Roles)	<input type="radio"/> Requisitioner: Approves shopping charts up to \$2,500 and submits cart for Departmental Approval. (Requisitioner Role cannot be mixed with the Shopper Role)
<input type="radio"/> Approver: Approves Requisitions & Invoice for Dept. ID's	<input type="radio"/> Other Roles Request: (i.e. Supplier Invite, Invoice Approver, Contract Requestor, etc...)
1. _____	1. _____
2. _____	2. _____
3. _____	3. _____
<input type="radio"/> BankCard (Procard) Roles:	<input type="radio"/> PI Role: Requisition & Invoice Approver for Dept. ID's
<input type="radio"/> BankCard User (Not needed if Employee has Requisition Role)	1. _____
<input type="radio"/> BankCard Approver with Edit (Not needed if Employee has Requisitioner Approver Role)	2. _____
<input type="radio"/> BankCard Approver without Edit (Not needed if Employee has Requisition Approver)	3. _____
<input checked="" type="radio"/> No Change in BuyWays Security / No Change in Roles	<b>Attachment Option for additional details, and/or instructions.</b>
Request Made By: _____	 <b>Optional</b>
<b>Manager / Supervisor Approval:</b>	

### I. Procard Reallocate by Node Level:

Example:

If the user already has the Default Roles but needs Read/Write Access to a Node Level to reallocate Procard expenses (also see the OneDrive Information for Admins folder/ 6. Procard Reallocation).

<b>Access Request Information:</b>	
Access Needed For Name:	EMPL ID:
Employee Email:	
<b>Type of Request: Please Select One</b>	
<input type="radio"/> New Access Request	<input type="radio"/> Do Not Use Student Email Address
<input type="radio"/> Modification to existing access	
<b>Job Type: Please Select One Position Level Within UML</b>	
<input type="radio"/> Vice Chancellor – LEXE	<input type="radio"/> Faculty Start-Up Project Team Member Only
<input type="radio"/> Associate Vice Chancellor / Dean – LDIV	<input type="checkbox"/> PI – Individual Dept. ID's
<input type="radio"/> Dean Administrator – LDIV	<input type="checkbox"/> Add to ORA FIN Reports
<input type="radio"/> Department Administrator - LDEP	<input checked="" type="radio"/> Other: (i.e. RA/TA)
<input type="radio"/> Director / Chair – LDEP	<b>read/write procard reallocation</b>
Replacing Current Chair: _____	<b>Attachment Option for additional details, and/or instructions.</b>
<b>PeopleSoft / Summit Default Roles: Please Select One (Type of access being requested)</b>	
<input type="radio"/> Default Roles (PeopleSoft / Summit Inquiry & Reporting)	<input type="radio"/> Other Roles (If Known): _____
<input checked="" type="radio"/> No Roles Needed / No Change in Roles	
<input type="radio"/> Expense Approver (Other: FS_EX Approver): Dept. ID: _____	<b>Attachment Option for additional details, and/or instructions.</b>
<b>Required:</b> Contact <a href="mailto:Budget-Office@UML.EDU">Budget-Office@UML.EDU</a> when form is completed (Employee will require CFAST ID and FS_EX Approver Role).	
<b>PeopleSoft / Summit Department Security: Please Select One (Level of access being assigned)</b>	
<input type="radio"/> *Executive Level, Division Level or Department Level user	<input type="radio"/> Specific Individual Department ID's:
<input type="radio"/> Executive Level: LEXExxxxxx	List of specific Financial Departments user should have view access
<input type="radio"/> Division Level: LDIVxxxxxx	1. _____
<input checked="" type="radio"/> Department Level: LDEPxxxxxx	2. _____
LDEP100305	3. _____
<input type="radio"/> No Department Security Required / No Change in Department Security	
<input type="radio"/> Other: Specify _____	<b>Attachment Option for additional details, and/or instructions.</b>
<b>BuyWay Roles: Please Select One (Role to be assigned) A Requisitioner cannot be an Approver, the only exception is the PI Role.</b>	
<input type="radio"/> Shopper: Creates shopping charts and submits to Requisitioner for processing (Shopper Role cannot be mixed with Procard/BankCard user or Requisitioner Roles)	<input type="radio"/> Requisitioner: Approves shopping charts up to \$2,500 and submits cart for Departmental Approval. (Requisitioner Role cannot be mixed with the Shopper Role)
<input type="radio"/> Approver: Approves Requisitions & Invoice for Dept. ID's	<input type="radio"/> Other Roles Request: (i.e. Supplier Invite, Invoice Approver, Contract Requestor, etc...)
1. _____	1. _____
2. _____	2. _____
3. _____	3. _____
<input type="radio"/> BankCard (Procard) Roles:	<input type="radio"/> PI Role: Requisition & Invoice Approver for Dept. ID's
<input type="radio"/> BankCard User (Not needed if Employee has Requisition Role)	1. _____
<input type="radio"/> BankCard Approver with Edit (Not needed if Employee has Requisitioner Approver Role)	2. _____
<input type="radio"/> BankCard Approver without Edit (Not needed if Employee has Requisition Approver)	3. _____
<input checked="" type="radio"/> No Change in BuyWays Security / No Change in Roles	<b>Attachment Option for additional details, and/or instructions.</b>
Request Made By: _____	 <b>Optional</b>
<b>Manager / Supervisor Approval:</b>	