



Learning with Purpose

Financial Services Access Request Form Job Aid

The Access Request Form is intended to be used for requesting access, or modified access to the UMass Lowell Financials systems (*PeopleSoft, Buy Ways and Summit Reporting*). This form would not be used to request access to any other system (*i.e., Student Financials, HR, etc....*).

Noting, required fields will be denoted with red boxes before the form can be moved on to approvals and completion.

Form Reference Detail:

Job Type:

This detail is needed to determine what type of access will be granted, and to ensure the correct approvals are included on the form. For the most part the options are self-explanatory, with perhaps the exception of

- Department Administrator – For individuals at the department level whose responsibilities include the department's day to day operations and budgets.
- Other – Populate with other details not otherwise mentioned on the Access Request form, with regards to the position of the employee access is being requested for (*i.e., Teaching or Research Assistant, Student Assistant, etc....*).

Default Roles:

- Default Role: Most of the UMass Lowell community requesting access will require only the "Default Roles". This option will provide all the basic Roles most users need, including self-service Role for creating / submitting Expense Reports.
- Mimic Role: Used if an employee requires identical Roles/access as another employee within your department. This option can be helpful for the IT Security Department. Noting, you will be *required* to enter the name and EMPL ID of the individual you intend your access to mimic.
- Expense Approver: Links the individual with a specific Department ID, providing access to approve Employee Expense Reports within the Approvers Department Security.
- Other Roles: For specific Financial Roles not otherwise mentioned on the Financials Access request form. Noting, you will be *required* to provide the Role name(s).
- No Roles Needed / No Change in Roles: This option will not provide any new Roles or Role updates. This would be selected if you need BuyWays Roles only, or you are adding Dept. Security.

Department Security:

Select the type of department security you need for **PeopleSoft and/or Summit**. Department security is either node based, or Dept. detail based. The nodes begin with LEXE, LDIV or LDEP, which are higher level Dept. access, and the Department details are individual departments (example L220100000).

- Executive Level (LEXExxxxxx): Access for all Department IDs within a senior manager's portfolio at the Executive Cabinet level, such as the Chancellor, Provost, VC's, and Executive Admins.
- Division Level (LDIVxxxxxx): Access for all Department IDs within a College, typically granted to the Dean of a College, higher level Directors, or Administrative support staff.
- Department Level (LDIVxxxxxx): Access for all Department IDs within a specific area of a College (*i.e., Civil Engineering, English, Public Safety, etc.*). Typically granted to Department Chair, Managers, or Administrative support staff.



Learning with Purpose

Financial Services Access Request Form Job Aid

Department Security: Continued

- No Department Security Required/No change in Dept Security – Select if you do not need access to a specific Department (*do not need access to view data in reports*). Not all employees need department security, also select this if you do not need a change in dept security.
 - Expense Report Submitting - Some employees only need to be able to submit expense reports, which you can do without department security.
 - Project View Only Access – Select to be added as a Project Team Member, to have the ability to view a Project Budgets within Summit Reporting (*Specific Department Security is not required within Summit*). If you want to be added as a team member to view a project, email: Budget_Office@uml.edu
- Mimic Role - Again, you can select mimic here, but only if you have provided an employee to mimic in Section 3.
- Specific Individual Department ID's (LDEPxxxxx): Access to specific Department(s). This option would be used if access is only needed for a handful of Departments used by PI's, Faculty, PT Employees, etc....

Buy Ways:

Select the Roles needed for BuyWays. If you are not certain which Roles are needed, please consult with someone within your department, or with UPST.

- Shopper – Primary Role (most common Role), allows user to create carts, but not submit the cart; carts must be assigned to a requisitioner.
- Requisitioner – Allows the user to submit carts, this Role should not be combined with the Shopper Role. If you have this Role you do not need the Bankcard User Role.
- Approver (Requisition Dept. Approver) – If selected, you are **required** to provide a specific Department ID (Dept. ID) which you need access to approve (*i.e., Dept. ID L220100000*). This Role allows a user to approve carts for specific Dept. ID's. If you have this Role, you do not need the Bankcard Approver Role.
- PI Approver – If selected, you are **required** to provide a specific Department ID (Dept. ID) which you need access to approve (*i.e., Dept. ID L220100000*).
- Bankcard User – Allows user to create and submit forms for Bankcard reallocations, this Role should not be combined with the Shopper Role. If you have the Requisitioner Role, you do not need this Role.
- Bankcard Form Approver – Allows user to approve Bankcard form requisitions. If you have the Requisition Approver role, you do not need this Role.
- Mimic Role - Again, you can select mimic here, but only if you have provided an employee to mimic in Section 3.
- Other Roles Requested – This option should be used for Role names not mentioned on this form, Roles UPST may have provided you with.
 - Example1: Invoice Approver Role – This *is not* the same as the Dept. Approver. Allows user to approve invoices, requires workflow, contact UPST.
 - Example2: Contract Requestor – Allows user to create contract requests
 - Example3: Supplier Invite – Allows users to invite suppliers to register via supplier self-service



Learning with Purpose

Financial Services Access Request Form Job Aid

- Bankcard Roles – This option requires additional workflow, contact UPST: UPST@UMASSP.EDU

DocUSign Workflow

Submitter -> Supervisor -> Budget Office -> Security Admin -> Return to Submitter marked “completed”

Examples of common Access requests

- If you only need to be a Shopper Role in BuyWays, this is a common request of student employees & TA/RA’s, the Access Request form would be completed as follows.

Access Request Information:	
Access Needed For Name: _____	EMPL ID: _____ Email: _____
Type of Request: Please Select One	
<input type="radio"/> New Access Request	<input type="radio"/> Modification to existing access
Job Type: Please Select One 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="radio"/> Other: <i>Please provide details below.</i>
<input type="radio"/> Dean Administrator – LDIV	_____
<input type="radio"/> Director / Chair – LDEP	<input type="radio"/> PI – Individual Dept. ID's
Replacing Current Chair: _____	<input type="radio"/> Add to ORA FIN Reports
<input type="radio"/> Department Administrator – LDEP	
PeopleSoft / Summit Default Roles: Please Select One (Type of access being requested)	
<input type="radio"/> Default Roles (PeopleSoft / Summit Inquiry & Reporting)	<input type="radio"/> Mimic Role of:
<input type="radio"/> No Roles Needed / No Change in Roles	Employee Name: _____
<input type="radio"/> Expense Approver (Other: FS_EX Approver):	Employee ID: _____
Dept. ID: _____	<input type="radio"/> Other Roles (If Known):
PeopleSoft / Summit Department Security: Please Select One (Level of access being assigned)	
<input type="radio"/> *Executive Level, Division Level or Department Level user	<input type="radio"/> Other: <i>Specify</i> _____
<input type="radio"/> Executive Level: LEXExxxxxx	<input type="radio"/> Specific Individual Department ID's:
<input type="radio"/> Division Level: LDIVxxxxxx	List of specific Financial Departments user should have view access
<input type="radio"/> Department Level: LDEPxxxxxx	1 _____
<input type="radio"/> No Department Security Required / No Change in Department Security	2 _____
<input type="radio"/> Mimic Role of: See above PeopleSoft / Summit Default Roles Section	3 _____
BuyWays Roles: Please Select One (Role to be assigned)	
<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 type="radio"/> Mimic Role of: See above PeopleSoft / Summit Default Roles Section	<input type="radio"/> No Change in BuyWays Security / No Change in Roles

Examples of common Access requests Continued

- o If you are a Faculty member with a Startup Project only, the Access Request form would be completed as follows.

Access Request Information:	
Access Needed For	Name: _____ EMPL ID: _____ Email: _____
Type of Request: Please Select One	
<input type="radio"/> New Access Request	<input type="radio"/> Modification to existing access
Job Type: Please Select One 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="radio"/> Other: Please provide details below.
<input type="radio"/> Dean Administrator – LDIV	_____
<input type="radio"/> Director / Chair – LDEP	<input type="radio"/> PI – Individual Dept. ID's
Replacing Current Chair: _____	<input type="radio"/> Add to ORA FIN Reports
<input type="radio"/> Department Administrator – LDEP	
PeopleSoft / Summit Default Roles: Please Select One (Type of access being requested)	
<input type="radio"/> Default Roles (PeopleSoft / Summit Inquiry & Reporting)	<input type="radio"/> Mimic Role of:
<input type="radio"/> No Roles Needed / No Change in Roles	Employee Name: _____
<input type="radio"/> Expense Approver (Other: FS_EX Approver):	Employee ID: _____
Dept: ID: _____	<input type="radio"/> Other Roles (If Known):

PeopleSoft / Summit Department Security: Please Select One (Level of access being assigned)	
<input type="radio"/> *Executive Level, Division Level or Department Level user	<input type="radio"/> Other: Specify _____
<input type="radio"/> Executive Level: LEXExxxxxx	<input type="radio"/> Specific Individual Department ID's:
<input type="radio"/> Division Level: LDIVxxxxxx	List of specific Financial Departments user should have view access
<input type="radio"/> Department Level: LDEPxxxxxx	1 _____
<input type="radio"/> No Department Security Required / No Change in Department Security	2 _____
<input type="radio"/> Mimic Role of: See above PeopleSoft / Summit Default Roles Section	3 _____
BuyWay Roles: Please Select One (Role to be assigned) (Requisitioner cannot be an Approver, the only exception is the PI Role)	
<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 type="radio"/> Mimic Role of: See above PeopleSoft / Summit Default Roles Section	<input type="radio"/> No Change in BuyWays Security / No Change in Roles

Example of the different levels of the RPT Department Tree

