

FD-805 Financial Systems Access Request

Instructions: This form is used to designate or remove access for FAMIS (Purchasing, Departmental Budget Request, Departmental Correction Request, Employee Payroll Action, and Property and Transfer of Departmental Property Requests), Division of Finance Document Imaging, AggieBuy, Pathway Net, and iPayment. Please refer to User Access Descriptions for appropriate access types. The employee requesting access should read the Statement of Responsibility and sign the form. Any update requested on this form will overwrite all existing access unless otherwise specified.

User Information: Request Type: _____

Employee Name:	Employee UIN:	E-Mail:
Dept / Sub Dept:	Phone:	Mail Stop:

Mentor Information: Required for gaining entry access to FAMIS or AggieBuy purchasing systems prior to formal training. *As the mentor, I will provide purchasing module training and assistance for the user. I have reviewed mentor policies and security <http://finance.tamu.edu/fmo/ts/docs/mentor.asp> and agree to abide by them.*

Mentor Name:	Mentor Signature:	Mentor E-mail:
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FAMIS/Canopy List specific Departments/Sub-Departments requested. Attach additional department information if needed.

Access Type:	Request Type:				Dept / Sub Dept	System Parts		
	Inquiry	Creator	Approve	Signer		02	10	Other Agencies
Purchasing								
DBR								
EPA								
Property								
Budget			N/A	N/A				

AggieBuy Request Type: _____

Access Type:	Allocator	Approver (optional)	Final Approver	Principle Investigator (PI)	PI accounts to Access
Department					

Imaging Request Type: _____

Access Type:	Payroll Reports- List Payroll Report Sequence #	Budget Reports- List Budget Report Sequence #	FMO Voucher Library
Pay Seq./Budget Seq. #			
Payroll Approval			
_____ Payroll Executive Director or Delegate Signature			_____ Date
Budget Approval			
_____ Budget Executive Director or Delegate Signature			_____ Date

Pathway Net Request Type:

Access type	Payment Card	Travel Card
List Departments		
Cardholder Name		

iPayment Request Type:

Access Type	List All Department Codes requested here:

Additional Comments

Statement of Responsibility: I understand that I will be in violation of university regulations, state and federal law if I gain or help others gain unauthorized access to the systems above. I acknowledge that neither I nor anyone else possesses the authority to allow anyone to use my I.D. or password. I understand that if I violate university regulations and state and federal laws by gaining or helping others gain unauthorized access, I will be subject to university disciplinary action and criminal prosecution to the full extent of the law. (Chapter 33, Title 7 of the Texas Penal Code). I accept the responsibility of keeping the reports and information confidential. I understand, accept and will complete training relating to the software provided to me by Texas A&M University. Misuse or abuse of this responsibility as User/Supervisor may be just cause for revocation of software access and disciplinary action. I agree further not to attempt to circumvent the computer security system by using or attempting to use any transactions, software, files or resources I am not authorized to use.

User Printed Name	Signature	Date
Department Head or Delegate (Academic Departments)	Signature	Date
Assistant Dean or Delegate (Academic Departments)	Signature	Date
Director or Delegate (Non-Academic Departments)	Signature	Date

Instructions and Access Type Descriptions

To complete this form, you must select the type of modifications you are requesting. For each section you should choose from the following:

No Change - The access for this section does not require a change. This is the default option.

New User - The employee does not currently have any access or this type of access and now needs access

Remove all access and expire employee access - The employee is leaving your department or leaving the University and all access should be removed

Add to Existing Access - The specific modification should be made to the employee's access but no existing access should be changed or removed. For example, adding a new Department/Sub-department, campus, feature or system access without modifying any existing access.

Remove from Existing Access - Only this specific/partial access should be removed from the employee's access and all other access should remain the same

Mentor Program- In order to gain access to the entry or update functions you must have a mentor who agrees and is able to act in an advisory capacity so that you can begin work prior to completion of all formal training. At no time should you share your password with your mentor or mentee and at no time should you or your mentor use each other's workstations or financial system accesses.

FAMIS/Canopy: (Financial Accounting Management Information System/Web based portal for FAMIS)

Purchasing- This access is typically requested for users that serve as departmental bookkeepers or accountants. This access type includes access to components of FAMIS that include: Limited/Exempt, Travel, Requisitions, Receiving, Preliminary Fixed Assets, Support Account creation and maintenance, Departmental Profile Maintenance, and Departmental Correction Requests (DCR).

DBR- Departmental Budget Request access gives the user the ability to move funds from one FAMIS account to another, within certain guidelines and preset parameters. This includes the Budget Reserves pools as well as movements between accounts and departments within certain tolerances.

EPA/Payroll- Employee Payroll Action access is typically requested for Human Resource / Payroll personnel. This access gives the user the ability to process payroll actions for employees in the department / college. This access only includes those payroll activities available in FAMIS and does not include access to BPP, Train Traq, Leave Traq, or Time Traq.

Property- This access is typically requested for those users that have been identified as the Departmental Property contact in the department. This access gives the user the ability to create, update or transfer to another department and surplus property assets records.

Budget – This access is typically requested for those users who are responsible for preparing, reviewing and entering the department's annual budget.

Travel & Entertainment - This system is not yet operational.

Creator - can create the documents.

Approver - (Optional) Is allowed to approve but not provide final signature authority for an expenditure of funds, movement of assets, etc.

Signer - Can formally approve or sign.

AggieBUY: This system is not yet operational - @ the E-commerce purchasing system for Texas A&M University. All TAMU staff automatically have shopper rights to AggieBuy.

Allocator- This role is typically filled by departmental bookkeepers or accountants whose knowledge of the accounts, budgets, activities and mission of the departments allows them to review purchase requests for appropriateness, assign or correct accounts, and further the purchase requisition for appropriate approval.

Approver-Provides the final review and official delegated authority to make the requested purchase

Principle Investigator-Responsible person for a contract and grant research account who is responsible for approving any purchase made with their research based contract and grant funds.

Be sure to list the specific accounts or departments for which a Principle Investigator will have authority.

Imaging: (allows online viewing of purchase vouchers, invoices, reports and data)

FMO Library- Obtaining this access gives the user the ability to access purchase documents stored in Financial Management Operations' imaging system.

Payroll Reports- Obtaining this access gives the user the ability to access Payroll Reports to certain (approved) pay sequences. Access to pay sequences must be approved by the Director of Payroll or their delegate before access will be provided. Be sure you list all requested Payroll Report sequences requested.

Budget Reports – Obtaining this access gives the user the ability to access Budget Reports to certain (approved) budget sequences. Access to budget sequences must be approved by the Director of Budget Services or their delegate before access will be approved. Be sure you list all requested Budget Report sequences requested.

Pathway Net: (online system used to view and manage J.P. Morgan Chase payment card transactions)

Purchasing- Access to Pathway Net web based application allows the user to reallocate purchases made on their Individual and/or department] ~ !&@e ^ Úæ { ^} t Card.

Travel- Access to Pathway Net web based application allows the user to reallocate payments made on the department's Central Billing Account (CBA) card and/or department travel Payment Card.

i-Payment: (online system for processing accounts receivable, cash receivables and interdepartmental transfers)

Inquiry Only- This access simply allows the user to view, but not update information in the iPayment system.

User (120)- User access allows the user to create either individual or shared files within the system and process deposits, as well as create invoices for customers set up in the system.

Supervisor (110)- Supervisor access gives the user the ability to approve and balance deposits made by departmental users.

Inactivate (999)- This access option is used to inactivate a user's access.

Important Notes

You, the department, must send a completed, signed original of this form to MS 6000. Individuals whose employment paperwork has not been fully processed and who are not available for computer resource allocation will experience a delay in their access processing. Our goal is to provide preliminary access within 1-2 business days from our receipt. Incomplete or improperly signed forms will be returned to the user and experience a delay in processing.

Authorized Department Heads, Assistant Deans, Directors or their Delegate MUST have their signatures appear on the FD-860 signature card of records. Any user who will be given approver or signer access MUST have their signature added to the FD-860 card of record for each department and sub-department as indicated.