

## FD-805 Financial Systems Access Request for TAMU system Members 01,02,10

**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			Other Agencies
	Inquiry	Creator	Approver	Signer		02	10	01	
Purchasing									
DBR									
EPA									
Budget			N/A	N/A					
Property/FFX									

**AggieBuy** Request Type:

Access Type:	Allocator	Department Approver (optional)	Final Approver	Receiver	Print Acquisition Shopper
List Departments					

**Imaging** Request Type:

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



## Instructions and Access Type Descriptions

**This form is for use by Texas A&M University system members Part 01 –The Texas A&M University System, Part 02-Texas A&M University in College Station and Part 10- Texas A&M University at Galveston. 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) For departments or system members where Electronic Offices are managed by FMO or another office those desk assignment will be made automatically as appropriate.

**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 contacts 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 purchase, budget, property or payroll documents

**AggieBUY:** This system is undergoing implementation - however your department may not yet have implemented AggieBuy. You will be notified if your department is not in the implementation phase. The E-commerce purchasing system for Texas A&M University. All TAMU Part 02 Staff automatically have shopper rights to AggieBuy. List each department under the corresponding access type needed. This must be specific and complete i.e. FISC/non, FISC/UTIL, FISC/AP, etc.

**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.

**Department Approver** - optional additional approving step determined by departments. Please check with your department's assistant dean or director to see if this option is available to you.

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

**Receiver** - officially records when the goods or services have been received by the department.

**Print Acquisition Shopper** - authorized to initiate and approve all stationery and business card orders through the Tops contracted supplier. This access is typically limited to one or two business staff.

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

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

**Payroll Reports**- 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.

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

**Purchasing**- Access to Pathway Net's purchasing module allows the user to reallocate purchases made on their Individual Purchasing Card.

**Travel- Access** to Pathway Net's travel module allows the user to reallocate payments made on the department's Central Billing Account (CBA) card for travel services such as: Airfare, Hotel, and Car Rental.

**Department - Purchasing Card** - to Pathway Net's purchasing module allows the user to reallocate purchases made on their Department Purchasing 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 I-Payment system.

**User (120)** - User access allows the user to created 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.

Forms which are incomplete or contain access related errors will be returned to the requestor for correction.

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.