

## **Instructions for completing a Finance Systems – Request Access Form**

**Login link:** [Finance System - Request Access Form](#)

Login with your JMU e-ID and Password

Click 'Continue' and this will take you right into the access form

### **1. Customer Management**

- **Submission is For:**
  - If you are the customer, your info should automatically default in. If you are entering on behalf of someone else, please use the search window and search by that person's last name and then click on the person's name you are searching for. All other info should default in.
- **Submitted By:**
  - This will automatically default in with you info as the submitter.  
\*\*Note: You cannot make any changes to this section.

### **2. Finance Systems / Request Access**

- **Summary of your Submission**
  - Please give a brief summary of your request. (ex: Finance Reporting access, SPCC access)
- **Phone or email where you can be reached**
  - Please list a phone number where you can be reached if there are any questions or concerns.
- **Detailed Description**
  - Please give a detailed description of your request.

### **3. Submission Details**

#### ○ **Access**

##### **New**

- If you are a new user requesting access to the system.
- If you are requesting to add a new org to your reporting access.

##### **Change**

- If you are requesting a change to be made to your access.

##### **Delete**

- If you are leaving the university, please submit a delete request to remove your Finance access.

- If you are transferring to another department on campus, please submit a delete request to remove your Finance access.
- **Supervisor Info**
  - Please enter the customer's supervisor eID.  
\*\*Note: If the employee is transferring to another department on campus and is submitting this Request Access form to delete old access or requesting to retain access for a period of time, please enter the supervisor info that oversees the access you are requesting.
- **Replicate User eID**
  - Please ONLY use this field if you need the same access as a current employee
- **Job Responsibilities Description**
  - Please provide a brief description of your duties or responsibilities requiring the Finance access. This will help assist the Data Manager in determining access requirements to perform your job.
- **Finance**

### Specialized Core User

- Please check if you work in the following areas (Finance Office, Budget Office, University Business Office or Procurement).

### Departmental Reports

- Please check if you are a new user requesting to run reports (Monthly Detail, General Ledger, Budget Overview & Summary of Financial).
- Please check if you are an existing user requesting to add orgs to run reports.

### Finance SPCC (Small Purchase Charge Card)

- Please check if you are a new user looking to reconcile or review credit card.  
\*\*You must fill out a [SPCC Information Form](#). You may submit the form by campus mail or email [sherm2bm@jmu.edu](mailto:sherm2bm@jmu.edu).

### ○ **Department IDs**

Please list department IDs you are requesting access to. If you have an extensive list of department IDs, you may attach a list by clicking the attachment button at the top.

Please indicate **“See Attached List”** in the box. \*\*You or your supervisor must have signature authority for the department IDs listed.