

**Usage Notes: One User Access Form is required per user for create/change/termination of access.*

1 User Information

Effective Date Submit Date

Organization Name Facility Number

First Name Last Name 3rd Party Contractor

Department Title

E-mail Phone Number Ext.

Point of Contact (POC)

Users with this checked off will be considered the primary contact(s) for the organization (communication purposes)

2 User Access Details

Action Requested

Create New Account Change Existing Account Terminate User Access

User Security Profile

- Select security roles to add or remove (rem.) from the list. Select all roles which apply.
- This section is not required when "Terminate User Access" is selected from the "Action Requested" section.

Dynamics GP Security Roles

- | Add | Rem. | |
|--------------------------|--------------------------|--------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | Accounting Manager |
| <input type="checkbox"/> | <input type="checkbox"/> | AP Staff |
| <input type="checkbox"/> | <input type="checkbox"/> | AR Staff |
| <input type="checkbox"/> | <input type="checkbox"/> | Bank Reconciliation |
| <input type="checkbox"/> | <input type="checkbox"/> | Banking Staff |
| <input type="checkbox"/> | <input type="checkbox"/> | Finance Assistant |
| <input type="checkbox"/> | <input type="checkbox"/> | Fixed Assets Manager |
| <input type="checkbox"/> | <input type="checkbox"/> | Inquiry (All Areas) |
| <input type="checkbox"/> | <input type="checkbox"/> | Inventory Manger |
| <input type="checkbox"/> | <input type="checkbox"/> | Inventory Requisition |
| <input type="checkbox"/> | <input type="checkbox"/> | Inventory Req. and Supply Area |
| <input type="checkbox"/> | <input type="checkbox"/> | Invoice Matching |
| <input type="checkbox"/> | <input type="checkbox"/> | Purchasing Approver |
| <input type="checkbox"/> | <input type="checkbox"/> | Purchasing Assistant |
| <input type="checkbox"/> | <input type="checkbox"/> | Purchasing Staff (No Requisitions) |
| <input type="checkbox"/> | <input type="checkbox"/> | Purchasing Staff (With Requisitions) |

Additional Access

- | Add | Rem. | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Budget Analyst |
| <input type="checkbox"/> | <input type="checkbox"/> | E-Reconcile |
| <input type="checkbox"/> | <input type="checkbox"/> | E-Reconcile Admin |
| <input type="checkbox"/> | <input type="checkbox"/> | Finance Assistant (No Account Maintenance) |
| <input type="checkbox"/> | <input type="checkbox"/> | Finance Reporting |
| <input type="checkbox"/> | <input type="checkbox"/> | FRx Report Designer |
| <input type="checkbox"/> | <input type="checkbox"/> | GL Only |
| <input type="checkbox"/> | <input type="checkbox"/> | Inventory Inquiry Only (INQ_INV_001) |
| <input type="checkbox"/> | <input type="checkbox"/> | Journal Entry |
| <input type="checkbox"/> | <input type="checkbox"/> | MatMan Template |
| <input type="checkbox"/> | <input type="checkbox"/> | MMS Inquiry Only - All |
| <input type="checkbox"/> | <input type="checkbox"/> | MMS Supply Chain (Inquiry Only) |
| <input type="checkbox"/> | <input type="checkbox"/> | Pre Production (Test Env) Access |
| <input type="checkbox"/> | <input type="checkbox"/> | Program Manger (MMS Approving Requisitions, Purchasing Requisitions and General MMS Inquiries) |
| <input type="checkbox"/> | <input type="checkbox"/> | Purchasing Admin |
| <input type="checkbox"/> | <input type="checkbox"/> | View GL Account Financial Info (INQ_FIN_001) |

Analytical Accounting

- | | | |
|--------------------------|--------------------------|-----------------------------------|
| Add | Rem. | |
| <input type="checkbox"/> | <input type="checkbox"/> | Analytical Accounting (AA) Clerk |
| <input type="checkbox"/> | <input type="checkbox"/> | Analytical Accounting (AA) Manger |

Grant Management

- | | | |
|--------------------------|--------------------------|------------------|
| Add | Rem. | |
| <input type="checkbox"/> | <input type="checkbox"/> | Grant Management |

Mekorma

- | | | |
|--------------------------|--------------------------|-------------------------|
| Add | Rem. | |
| <input type="checkbox"/> | <input type="checkbox"/> | Mekorma MICR Admin |
| <input type="checkbox"/> | <input type="checkbox"/> | Mekorma MICR PM Clerk |
| <input type="checkbox"/> | <input type="checkbox"/> | Mekorma MICR Power User |
| <input type="checkbox"/> | <input type="checkbox"/> | Mekorma MICR STD User |
| <input type="checkbox"/> | <input type="checkbox"/> | Mekorma MICR UPR Clerk |
| <input type="checkbox"/> | <input type="checkbox"/> | Mekorma MICR UPR MNGR |

Revenue/Expense Roles

- | | | |
|--------------------------|--------------------------|---------------------------------------|
| Add | Rem. | |
| <input type="checkbox"/> | <input type="checkbox"/> | Revenue/Expense Deferral (RED) Clerk |
| <input type="checkbox"/> | <input type="checkbox"/> | Revenue/Expense Deferral (RED) Manger |

Safe Pay Roles

- | | | |
|--------------------------|--------------------------|----------------|
| Add | Rem. | |
| <input type="checkbox"/> | <input type="checkbox"/> | Safe Pay Setup |
| <input type="checkbox"/> | <input type="checkbox"/> | Safe Pay Trx |

SOP Roles

- | | | |
|--------------------------|--------------------------|-------------|
| Add | Rem. | |
| <input type="checkbox"/> | <input type="checkbox"/> | SOP |
| <input type="checkbox"/> | <input type="checkbox"/> | SOP Inquiry |
| <input type="checkbox"/> | <input type="checkbox"/> | SOP Setup |
| <input type="checkbox"/> | <input type="checkbox"/> | SOP Trx |

MMS Workflow

- | | | |
|--------------------------|--------------------------|------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | Workflow Admin** |
| <input type="checkbox"/> | <input type="checkbox"/> | Workflow Approver** |
| <input type="checkbox"/> | <input type="checkbox"/> | Workflow Participant** |

* Note that these modules/roles are only available to specific sectors and require the procurement of additional licenses. Contact the CCIM Service Desk for more information.

** To add or update the Workflow hierarchy with new approvers or approvees please contact the CCIM Service Desk.

3 Approvals

Organization Approver First Name	<input type="text"/>	Last Name	<input type="text"/>
Title	<input type="text"/>	E-mail	<input type="text"/>
Phone Number	<input type="text"/>	Ext.	<input type="text"/>

Approver Signature

Approval Date

Return this form to: servicedesk@ccim.on.ca

CCIM Initials & Date
Internal Use Only