

*\*Usage Notes: One User Access Form is required per user for create/change/termination of access.  
All fields marked with a (\*) in this form are required.*

**1. User Information**

Effective Date\*  Submit Date\*

Organization Name\*  Organization Number\*

First Name\*  Last Name\*   3rd Party Contractor

Department  Title\*

E-mail\*  Phone Number\*  Ext.

**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 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

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

Additional Access

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

Analytical Accounting

Analytical Accounting (AA) Clerk	<input type="radio"/> Add	<input type="radio"/> Remove
Analytical Accounting (AA) Manager	<input type="radio"/> Add	<input type="radio"/> Remove

Grant Management

Grant Management	<input type="radio"/> Add	<input type="radio"/> Remove
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Mekorma

Mekorma MICR Admin	<input type="radio"/> Add	<input type="radio"/> Remove
Mekorma MICR PM Clerk	<input type="radio"/> Add	<input type="radio"/> Remove
Mekorma MICR Power User	<input type="radio"/> Add	<input type="radio"/> Remove
Mekorma MICR STD User	<input type="radio"/> Add	<input type="radio"/> Remove
Mekorma MICR UPR Clerk	<input type="radio"/> Add	<input type="radio"/> Remove
Mekorma MICR UPR MNGR	<input type="radio"/> Add	<input type="radio"/> Remove

Revenue/Expense Roles

- |  |                           |                              |
|--|---------------------------|------------------------------|
| Revenue/Expense Deferral (RED) Clerk   | <input type="radio"/> Add | <input type="radio"/> Remove |
| Revenue/Expense Deferral (RED) Manager | <input type="radio"/> Add | <input type="radio"/> Remove |

Safe Pay Roles

- |                |                           |                              |
|----------------|---------------------------|------------------------------|
| Safe Pay Setup | <input type="radio"/> Add | <input type="radio"/> Remove |
| Safe Pay Trx   | <input type="radio"/> Add | <input type="radio"/> Remove |

SOP Roles

- |             |                           |                              |
|-------------|---------------------------|------------------------------|
| SOP         | <input type="radio"/> Add | <input type="radio"/> Remove |
| SOP Inquiry | <input type="radio"/> Add | <input type="radio"/> Remove |
| SOP Setup   | <input type="radio"/> Add | <input type="radio"/> Remove |
| SOP Trx     | <input type="radio"/> Add | <input type="radio"/> Remove |

**3. Approvals**

Organization Approver's 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](mailto: servicedesk@ccim.on.ca)

**CCIM Initials & Date**  
*Internal Use Only*