** Security User Permissions Instructions**

Please read the following instructions before completing the **SHARE Security User Permission form** for **HCM** or **Financials**.

The **SHARE Security User Permission** **Form** is required for the following:

* To assign security roles and request user ID’s and passwords for new users.
* To add security roles to existing user profiles.
* To remove security roles from existing users.
* To modify authorized workflow approvals.

**How to fill out the SHARE Security User Permission Form**

Any text in BLUE represents a field that is editable. These fields may be data entry fields or drop down boxes with a list of options. Fields labeled as Select are drop down boxes with limited options and fields labeled as Click here to enter text are text fields where you enter data.

Any text in ORANGE are instructions to you to assist you in filling out the form. It is important to pay attention to the ORANGE text.

It is **REQUIRED** that you fill out the following fields:

* Agency Name
* Employee E-Mail
* Employee Phone
* Effective Date
* Employee Status
* Business Unit
* Submitted By
* Employee Name
* SHARE Employee ID

Once you have provided the above information, you will select which roles the user needs **Added** or **Deleted** by clicking on the **Select** text. This will give you a drop down box with the options of Add, Delete, or Select.

**PLEASE NOTE:** **Select** is a default value. If you want to add a role, you must change this to **Add**. If you want to delete a role, you must select **Delete**. A value of **Select** means that we will not change the security relating to the user for that role.

**Agency Authorization**

This form must be signed by an appropriate officer within your agency. For the Financials form, the signature should be from the Chief Financial Officer (CFO) of your agency. Forms with an incorrect or missing signature will not be accepted.

** FINANCIAL Security User Permission Form**

**To request access, please complete this form, obtain the appropriate approval, and email to** **share.security@state.nm.us****. If a requested Role is added that denotes REQUIRED, please attach a copy of certificate of completion to the security form.**

**Agency Name:** Click here to enter text. **SHARE Employee ID #:** Click here to enter text.

**Business Unit:** Click here to enter text. **SHARE ID # (if applicable):** Click here to enter text.

**Submitted By:** Click here to enter text. **Employee E-Mail:** Click here to enter text.

**Employee Name:** Click here to enter text. **Employee Phone:** Click here to enter text.

**Employee Status:** Select From dropbox

|  |
| --- |
| Click here to enter text. |

**Require access to multiple Business Units? List them in the box.**

**Please use the dropdown and select “ADD” next to each job function that the user will perform. If you want to remove a role, select “DELETE.”**

**Accounts Payable Roles (SELECT ANY THAT APPLY) Accounts Receivable Roles (SELECT ANY THAT APPLY)**

|  |  |  |  |
| --- | --- | --- | --- |
| Select | View/Inquiry (AP\_VIEW) | Select | View/Inquiry (AR\_VIEW) |
| Select | Data Entry (AP\_DATA\_ENTRY) | Select | Data Entry (AR\_DATA\_ENTRY) |
| Select | Voucher Manager (AP\_MANAGER) |

**Commitment Control Roles (SELECT ANY THAT APPLY) General Ledger Roles (SELECT ANY THAT APPLY)**

|  |  |  |  |
| --- | --- | --- | --- |
| Select | View/Inquiry (KK\_VIEW) | Select | View/Inquiry (GL\_VIEW) |
| Select | Data Entry (KK\_DATA\_ENTRY) | Select | Data Entry (GL\_DATA\_ENTRY) |

**Purchasing Roles (SELECT ANY THAT APPLY) Other (SELECT ANY THAT APPLY)**

|  |  |  |  |
| --- | --- | --- | --- |
| Select | View/Inquiry (PO\_VIEW) | **Add** | FS Base User Role (USER) |
| Select | Buyer – Purchase Order Data Entry (PO\_BUYER) | **Included** | Query Viewer (QRY\_VIEWER) (Included in FS Base User Role) |
| Select | Requester – Requisition Data Entry (PO\_REQUESTOR) | Select | Suppliers View/Inquiry (SUP\_VIEW) |
| Select | Procurement Contracts View/Inquiry (PRO\_CNTRS\_VIEW) | Select | Tree Viewer (TREE\_VIEWER) |
| Select | Procurement Contracts Data Entry (PRO\_CNTRS\_DATA\_ENTRY) |

**Workflow and Agency Specific Roles can only be assigned by DFA or DoIT.**

**Workflow Approval Roles (SELECT ANY THAT APPLY)**

|  |  |  |  |
| --- | --- | --- | --- |
| Select | Agency ChartField Request Approval | Select | Purchase Order Approval – Level 2 |
| Select | Budget Approval – Level 1 | Select | Requisition Approval – Level 2 |
| Select | Budget Approval – Level 2 | Select | Voucher Approval – Level 2 |
| Select | General Ledger Journal Approval – Level 2 |

**The roles listed below are not available to all agencies. They may only be requested if your agency is using the module for which access is being requested.**

**Agency Specific Roles (SELECT ANY THAT APPLY) Agency Specific Roles (SELECT ANY THAT APPLY)**

|  |  |  |  |
| --- | --- | --- | --- |
| Select | Asset Management View/Inquiry (AM\_VIEW) | Select | Grants Management View/Inquiry (GM\_VIEW) |
| Select | Asset Management Data Entry (AM\_DATA\_ENTRY) | Select | Grants Management Clerk/Data Entry (GM\_DATA\_ENTRY) |
| Select | Asset Management Maintenance (AM\_MAINTENANCE) | Select | Products View/Inquiry (PROD\_VIEW) |
| Select | Billing Inquiry View/Inquiry (BI\_VIEW) | Select | Project Costing View/Inquiry (PC\_VIEW) |
| Select | Billing Inquiry Data Entry (BI\_DATA\_ENTRY) | Select | Project Costing Data Entry (PC\_DATA\_ENTRY) |
| Select | Customer Contracts View/Inquiry (CA\_VIEW) | Select | Receiving View/Inquiry (REC\_VIEW) |
| Select | Customer Contracts Data Entry (CA\_DATA\_ENTRY) | Select | Receiving Data Entry (REC\_DATA\_ENTRY) |

**The roles listed below are restricted. They can only be assigned by DoIT security admins.**

**Restricted Roles (SELECT ANY THAT APPLY) Restricted Roles (SELECT ANY THAT APPLY)**

|  |  |  |  |
| --- | --- | --- | --- |
| Select | Accounts Payable Cancel/Void (AP\_CANCEL\_VOID) | Select | General Ledger Batch Processes (GL\_BATCH) |
| Select | Accounts Payable Manager (AP\_PAYMENT\_MNGR) | Select | General Ledger Setup (GL\_SETUP) |
| Select | Accounts Payable Setup (AP\_SETUP) | Select | Grants Management Batch Processes (GM\_BATCH) |
| Select | Accounts Receivable Customer Maintenance (AR\_CUSTOMER) | Select | Grants Management Setup (GM\_SETUP) |
| Select | Accounts Receivable Setup (AR\_SETUP) | Select | Grants Portal View/Inquiry (GP\_VIEW) |
| Select | Accounts Receivable Batch Processes (AR\_BATCH) | Select | Grants Portal Setup/Process (GP\_SETUP) |
| Select | Accounts Receivable – DoIT Interface (AR\_DOIT) | Select | Products Data Entry (PROD\_DATA\_ENTRY) |
| Select | Accounts Receivable – CYFD Interface (AR\_CYFD) | Select | Project Costing to TL Interface (PC\_TL\_INTFC) |
| Select | Allocations Data Entry (ALLOC\_DATA\_ENTRY) | Select | Project Costing Setup (PC\_SETUP) |
| Select | Asset Management Setup (AM\_SETUP) | Select | Project Costing Batch Processes (PC\_BATCH) |
| Select | Billing Inquiry Setup (BI\_SETUP) | Select | Purchasing Setup (PO\_SETUP) |
| Select | Commitment Control Setup (KK\_SETUP) | Select | Query Manager Private (MGR\_PRIVATE) |
| Select | Customer Contracts Setup (CA\_SETUP)  |

**Agency Authorization**

Name: Click here to enter text. Title: Click here to enter text.

Signature: Date:

**Please note some roles have controlled access. Submission of this form does not guarantee access will be given. Requests missing an appropriate signature or proof of training certificate for required roles will not be accepted.**

**FINANCIAL Security Role Detailed Descriptions**

The table below contains a description of each Role in the Security User Permission Form. Each **Role Name** is matched to the name on the form. Roles with the ALL column checked can be assigned to Financials users. Roles with the Agency column checked are restricted to specific agencies. Roles that are marked Restricted are limited to whom they can be assigned.

|  |
| --- |
| **Accounts Payable Roles** |
| **Functional Name** | **Definition** | **Module** | **ALL** | **Agency** | **Restricted?** | **Definition** | **Module** | **ALL** | **Agency** | **Restricted?** |
| View/Inquiry | AP\_VIEW – view transactions and run reports in Accounts Payable. | AP | **X** |  |  |
| Data Entry | AP\_DATA\_ENTRY – view and create/update vouchers in Accounts Payable. | AP | **X** |  |  |
| Voucher Manager | AP\_MANAGER – view and create/update vouchers, and access to Match Workbench in Accounts Payable. | AP | **X** |  |  |
| Cancel/Void | AP\_CANCEL\_VOID – cancel/void transactions in Accounts Payable. | AP |  |  | **Yes** |
| Manager | AP\_PAYMENT\_MNGR – manage payments. | AP |  |  | **Yes** |
| Setup | AP\_SETUP – view setup Accounts Payable. | AP |  |  | **Yes** |
| **Accounts Receivable Roles** |
| **Functional Name** | **Definition** | **Module** | **ALL** | **Agency** | **Restricted?** |
| View/Inquiry | AR\_VIEW – view transactions and run reports in Accounts Receivable | AR | **X** |  |  |
| Data Entry | AR\_DATA\_ENTRY – view and create/apply payments in Accounts Receivable | AR | **X** |  |  |
| Batch Processes | AR\_BATCH – run batch processes in Accounts Receivable | AR | **X** |  |  |
| DoIT Interface | AR\_DOIT – modify the AR DoIT interface. DoIT only role | AR |  | **X** | **Yes** |
| CYFD Interface | AR\_CYFD – modify the AR CYFD interface. CYFD only role | AR |  | **X** | **Yes** |
| Customer Maintenance | AR\_CUSTOMER – maintain customer data in Accounts Receivable | AR |  |  | **Yes** |
| Setup | AR\_SETUP – view setup Accounts Receivable | AR |  |  | **Yes** |
| **Asset Management Roles** |
| **Functional Name** | **Definition** | **Module** | **ALL** | **Agency** | **Restricted?** |
| View/Inquiry | AM\_VIEW – view transactions and run reports in Asset Management | AM |  | **X** |  |
| Data Entry | AM\_DATA\_ENTRY – view and create/update assets in Asset Management | AM |  | **X** |  |
| Maintenance | AM\_MAINTENANCE – perform maintenance on Asset management | AM |  | **X** |  |
| Setup | AM\_SETUP – view setup Asset Management | AM |  | **X** |  |
| **Billing Roles** |
| **Functional Name** | **Definition** | **Module** | **ALL** | **Agency** | **Restricted?** |
| View/Inquiry | BI\_VIEW – view transactions and run reports in Billing | BI |  | **X** |  |
| Data Entry | BI\_DATA\_ENTRY – view and create/update bills in Billing | BI |  | **X** |  |
| Setup | BI\_SETUP – view setup Billing Inquiry | BI |  | **X** | **Yes** |
| **Commitment Control Roles** |
| **Functional Name** | **Definition** | **Module** | **ALL** | **Agency** | **Restricted?** |
| View/Inquiry | KK\_VIEW – view transactions and run reports in Commitment Control | KK | **X** |  |  |
| Data Entry | KK\_DATA\_ENTRY – view and enter budget journals in Commitment Control | KK | **X** |  |  |
| Setup | KK\_SETUP – view setup Commitment Control | KK |  |  | **Yes** |
| **Customer Contracts Roles** |
| **Functional Name** | **Definition** | **Module** | **ALL** | **Agency** | **Restricted?** |
| View/Inquiry | CA\_VIEW – view transactions and run reports in Customer Contracts | CA | **X** |  |  |
| Data Entry | CA\_DATA\_ENTRY – view and create/update contracts in Customer Contracts | CA | **X** |  |  |
| Setup | CA\_SETUP – view setup Customer Contracts | CA |  |  | **Yes** |
| **General Ledger Roles** |
| **Functional Name** | **Definition** | **Module** | **ALL** | **Agency** | **Restricted?** |
| View/Inquiry | GL\_VIEW – view transactions and run reports in General Ledger | GL | **X** |  |  |
| Data Entry | GL\_DATA\_ENTRY – view and create journal entries in General Ledger | GL | **X** |  |  |
| Setup | GL\_SETUP – view setup General Ledger | GL | **X** |  |  |
| Batch Processes | GL\_BATCH – run batch processes in General Ledger | GL |  |  | **Yes** |
| **Grants Management Roles** |
| **Functional Name** | **Definition** | **Module** | **ALL** | **Agency** | **Restricted?** |
| View/Inquiry | GM\_VIEW – view transactions and run reports in Grants Management | GM |  | **X** |  |
| Clerk/Data Entry | GM\_DATA\_ENTRY – view and create grants in Grants Management | GM |  | **X** |  |
| Setup | GM\_SETUP – view setup Grants Management | GM |  | **X** |  |
| Batch Processes | GM\_BATCH – run batch processes in Grants Management | GM |  | **X** | **Yes** |
| **Project Costing Roles** |
| **Functional Name** | **Definition** | **Module** | **ALL** | **Agency** | **Restricted?** |
| View/Inquiry | PC\_VIEW – view transactions and run reports in Project Costing | PC |  | **X** |  |
| Data Entry | PC\_DATA\_ENTRY – view and create/update projects in Project Costing | PC |  | **X** |  |
| Batch Processes | PC\_BATCH – run batch processes in Project Costing | PC |  | **X** |  |
| TL to PC Interface | PC\_TL\_INTFC – access to run the T&L to PC Interface from HCM in Project Costing | PC |  | **X** |  |
| Setup | PC\_SETUP – view setup Project Costing | PC |  | **X** |  |
| **Purchasing Roles** |
| **Functional Name** | **Definition** | **Module** | **ALL** | **Agency** | **Restricted?** |
| View/Inquiry | PO\_VIEW – view transactions and run reports in Purchasing | PO | **X** |  |  |
| Buyer – Purchase Order Data Entry | PO\_BUYER – view and create/update purchase orders in Purchasing | PO | **X** |  |  |
| Requestor – Requisitions Data Entry | PO\_REQUESTOR – view and create/update requisitions in Purchasing | PO | **X** |  |  |
| Setup | PO\_SETUP – view setup in Purchasing | PO |  |  | **Yes** |
| Procurement Contracts View/Inquiry | PRO\_CNTRS\_VIEW – view transactions in Procurement Contracts | - | **X** |  |  |
| Procurement Contracts Data Entry | PRO\_CNTRS\_DATA\_ENTRY – view and create/update Procurement Contracts | - | **X** |  |  |
| **Other Roles** |
| **Functional Name** | **Definition** | **Module** | **ALL** | **Agency** | **Restricted?** |
| FS Base User | USER – base level user role (everyone is given this role) | - | **X** |  |  |
| Query Viewer | QRY\_VIEWR – view queries and download results (Included in FS Base User, do not need to additionally assign) | - | **X** |  |  |
| Allocations Data Entry | ALLOC\_DATA\_ENTRY – access to run GL allocations in Allocations | ALLOC |  |  | **Yes** |
| Products View/Inquiry | PROD\_VIEW – view transactions in Products | - |  |  | **Yes** |
| Products Data Entry | PROD\_DATA\_ENTRY – view and modify transactions in Products | - |  |  | **Yes** |
| Query Mngr Private | MGR\_PRIVATE – manage private queries | - |  |  | **Yes** |
| Receiving View/Inquiry | REC\_VIEW – view transactions in Receiving | - |  | **X** |  |
| Receiving Data Entry | REC\_DATA\_ENTRY – receive goods or services  | - |  | **X** |  |
| Suppliers View/Inquiry | SUP\_VIEW – view supplier information | - | **X** |  |  |
| Tree Viewer | TREE\_VIEWER – view trees in Financials | - | **X** |  |  |