



HUMAN SERVICES DEPARTMENT



“Cheat Sheet” for Assigning Employee SHARE Security Roles for FINANCIAL ACCESS

Please reference the *SHARE System Security Access Authorization Form* referenced in the Forms section of this website and also included in the New Employee Hire Packet! An electronic version of this Form and the *Workflow Form* can also be accessed from the HSD SHARE Help Website: http://www.state.nm.us/hsd/SHARE_INTRO.html

Q: If the new employee will be creating Requisitions, what Security Roles should I request for this new hire?

A: If the new employee will be responsible for procurement duties, such as ordering supplies and will prepare Requisitions, select:

1. **Financial Security Roles – General Ledger Module Roles** – GL Inquiry Access
2. **Financial Security Roles – Purchasing Module** – PO Requisition Creation
3. **Financial Security Roles – Purchasing Module** – PO Inquiry & Report Processing for all of Purchasing
4. **Financial Security Roles – Purchasing Module** – PO Creation of Receiving Documents Online
5. **Financial Security Roles - Accounts Payable Module** - AP Inquiry & Report for Vouchers
6. **Financial Security Roles - Accounts Payable Module** - AP Inquiry & Report for Payments (Warrants)
7. **Financial Security Roles – Other** – Vendor Inquiry

Q: If the new employee will be approving requisitions, what Security Roles should I request for my new hire?

A: You should request:

Financial Security Roles – Purchasing Module – PO Requisition Approval 1 or 2
(The **Workflow Form** also needs to be completed)

Approval Level 1 = up to \$500.00, and Approval Level 2 = From \$501.00 to \$20,000.00

PLEASE NOTE: SECURITY ROLES MUST BE REQUESTED BY THE HIRING SUPERVISOR AND SUBMITTED TO THE OFFICE OF HUMAN RESOURCES FOR APPROVAL BY THE OFFICE OF HUMAN RESOURCES AND THE HSD CHIEF FINANCIAL OFFICER!!!

8/28/2006