



Supervisor Quick Reference — Requesting System Access in Agiloft

Access Agiloft at dartgo.org/Agiloft | You are responsible for requesting, updating, and removing your employees' system access.

KNOW YOUR SCENARIO

NEW EMPLOYEE

Set up system access for someone joining your team for the first time.

Select: **Initial Setup**

Submit before or on start date.

ROLE CHANGE

Update access for a current employee whose responsibilities have shifted.

Select: **Revision to Existing Access**

Submit as soon as the change is confirmed.

OFF-BOARDING

Remove access when an employee leaves your team or Dartmouth.

Select: **Ending Access**

Submit on or before their last day.

⚠ Off-Boarding Reminder: Removing system access when an employee departs is a **security and compliance obligation** — not just a formality. Submit the request on or before the employee's last day. Do not wait.

STEPS TO SUBMIT A REQUEST

1. Go to **dartgo.org/Agiloft**
2. Select **System Access** → **New System Access** from the ribbon
3. Search for the employee by name and select them — their Net ID, Department, and Division will auto-fill
4. Choose their **Employment Status** from the dropdown
5. Enter the **Access Start Date** (and End Date if required)
6. Select the **type of request** (Initial, Revision, or End Access)
7. Write a brief **Access Request Summary** explaining the reason
8. *Optional:* Click **Save Draft and Check for Forms** to copy a prior employee's access as a starting point — then review and adjust before submitting
9. Select the **Fiscal Officer or Approver**, then click **Submit**

HOW TO VIEW CURRENT ACCESS

Option 1 — Employee Record

1. Go to the **Employee Table** (left nav, under *People*)
2. Search for the employee → click their **ID number**
3. Select the **System Access tab** to view current access

Option 2 — System Access Table

1. Navigate to **System Access** in Agiloft
2. Filter by Department or Division
3. Hover over **View** for report options, or click an employee's ID to open their record

Use Option 2 to compare access across multiple employees.

TIPS

- Required fields are in **blue text with a red asterisk (*)**
- **Hover over any field** for built-in help text
- Backfilling a role? Copy the prior employee's access to save time — but always review before submitting
- If your employee search returns no results, expand *Search Options* → select *All Text Fields* → click Go