



Finance Applications Access/Amendment Form

Staff member to complete Sections A and B, then forward to Faculty Manager / equivalent for Section C (Authorisation). Form to be sent to Client Services, Financial Services M449 for processing. Notification is sent to user by Client Services after completion.

Please complete this form online and print for signing

SECTION A: USER DETAILS

Request Type: New Access <input type="checkbox"/>	Amend Access <input type="checkbox"/>	Name Change <input type="checkbox"/>	Existing User ID <input type="text"/>
Surname <input type="text"/>	Given Names <input type="text"/>		
PHEME ID ¹ <input type="text"/>	Employee ID <input type="text"/>		
Phone <input type="text"/>	Email <input type="text"/>		
Section <input type="text"/>	School / Area <input type="text"/>	MBDP <input type="text"/>	

¹ Non-University staff [must sign up for a PHEME ID](#)

SECTION B: ACCESS – complete B1 or B2, and complete B3 if EMS required

B1: Copy Access from Existing User	User ID to replace/clone	Travel Req	Finance Modules	Budget System
N/A <input type="checkbox"/>	Replace ² <input type="checkbox"/>	Clone <input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>

² Deletion Form must be completed for previous user

Access to be copied for which system(s)?

OR

B2: User Access				
Business Units	Primary Business Unit ID: <input type="text"/>	5 digit BU code		
	Level of BU Access:	Faculty-wide <input type="checkbox"/>	School/Area <input type="checkbox"/>	BU only <input type="checkbox"/>
				UWA <input type="checkbox"/>
Travel Requisition	Travel Arranger:	No <input type="checkbox"/>	Yes <input type="checkbox"/>	Travel Workflow: Enquiry <input type="checkbox"/>
	Travel Approver:	No <input type="checkbox"/>	Yes <input type="checkbox"/>	Maintenance <input type="checkbox"/>
Finance Modules	General Ledger:	Research Reporting <input type="checkbox"/>	Reporting & Enquiry <input type="checkbox"/>	Finance Officer <input type="checkbox"/>
	Purchasing:	None <input type="checkbox"/>	Purchase Orders <input type="checkbox"/>	or Receiving <input type="checkbox"/>
				or Both (non P2P) <input type="checkbox"/>
	Access to other Users' POs?	User ID _____	User ID _____	
		User ID _____	User ID _____	
	IFT: ³	No <input type="checkbox"/>	Yes <input type="checkbox"/>	
	Delegated Bulk Invoice Approval: ³	None <input type="checkbox"/>	Approval <input type="checkbox"/>	

³ Note: Minimum Band Level 6 required for IFT and Delegated Bulk Invoice Approval

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*AUTHORISER SIGNATURE	<input type="text"/>	DATE	<input type="text"/>
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*** Ensure both pages are signed**



B2 (continued)

Budget System

N/A

School Manager

Faculty Manager

**BU, Area or Fac⁴
Hierarchy Level**

**ID of BU, Area
or Faculty**

Name of BU, School/Area or Faculty

⁴ FacID can only be selected for Faculty Manager Group access

1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____
5.	_____	_____	_____
6.	_____	_____	_____
7.	_____	_____	_____
8.	_____	_____	_____

B3: EMS (Expense Management System)

N/A

Proxy

Manager

Manager/Approver⁵

Current Approver _____

⁵ If Manager/Approver is selected then the existing cardholder Approver is overwritten for cards listed below.

List appropriate Cardholder details (for Proxy and Manager/Approver⁵ access only):

Cardholder Name _____	Employee ID _____
Cardholder Name _____	Employee ID _____
Cardholder Name _____	Employee ID _____
Cardholder Name _____	Employee ID _____
Cardholder Name _____	Employee ID _____
Cardholder Name _____	Employee ID _____
Cardholder Name _____	Employee ID _____
Cardholder Name _____	Employee ID _____

SECTION C: AUTHORISATION

PLEASE REFER TO: [UNIVERSITY DELEGATIONS FOR AUTHORISED BAND LEVEL](#)

NAME (Print)	<input type="text"/>	PHONE	<input type="text"/>
POSITION	<input type="text"/>	BAND LEVEL	<input type="text"/>
EMAIL ADDRESS	<input type="text"/>	MBDP	<input type="text"/>
SCHOOL/FAC NAME	<input type="text"/>		
* SIGNATURE	<input type="text"/>	DATE	<input type="text"/>

** Ensure both pages are signed*

SECTION D: CLIENT SERVICES INPUT (Financial Services Only)

Request approved by :

Client Services	Name	Signature	Date
			/ /

SECTION E: SYSTEMS SUPPORT (Financial Services Only)

Finance System: N/A

Personal Data N/A Added / updated

User Profile

➤ **General:**

Is new PSoft OPRID required? Yes No (Yes for new access, change in name or additional BU security)

Aligned with Pheme UserID? Yes No If no, reason: _____

New OPRID: _____

Password Assigned: _____

Primary Class updated? N/A Yes UFS assigned: UFS

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➤ **ID:** ID Types updated? N/A Employee UWA Employee Link

➤ **Roles:** Roles names updated? N/A

General Ledger:

	Research Reporting	Report & Enquiry	Finance Office (FO)	PG Manager
None	UFS_RESEARCHER_REP <input type="checkbox"/>	UFS_STD <input type="checkbox"/>	UFS_STD_GL <input type="checkbox"/>	UFS_STD_GL_CTL_NO_PO_NO_RC <input type="checkbox"/>
Purchasing Orders	N/A	N/A	UFS_STD_GL_PO_ADD_RC_INQ <input type="checkbox"/>	
Receipts	N/A	N/A	UFS_STD_GL_RC_ADD_PO_INQ <input type="checkbox"/>	
Both (non P2P)	N/A	N/A	UFS_STD_GL_PO <input type="checkbox"/>	UFS_STD_GL_CTL <input type="checkbox"/>

eTForm Access N/A UFS_ET_ACC added removed

Bulk Inv App / Sal Verification N/A UFS_AP_AUDIT added removed

Expenses (refer to section B3) N/A UFS_EX_ACC% added removed UFS_EX_MGR% added removed

Buyer Setup N/A Buyer added Ship To : _____ Location: _____

User Preferences N/A

Overall Preferences: N/A BU Updated BU: _____ Process Group

Source: N/A ONL ONR (Research Services only)

General Ledger: N/A Jnl options Manager & Rpt Key1 (for PG Manager only)

Procurement – Purch Order Auth N/A Buyer added Other buyers added Other User Pref's updated

Procurement – Receiver Setup N/A Receiving BU: _____ Days +/- Today: _____

Run Control ID setup: N/A Yes

FinServNews Email: N/A Add Remove old Email (for change in name)

Expenses N/A Activated Authorise Users Authorise Managers for BU

Budget System: N/A

User added to Citrix Groups? Yes INC _____ *ITS to add groups ITS_Citrix_Users & QSP_Citrix*

Advisor ID: _____

Production Setup:

Password reset: N/A Yes Password: _____

Group amended N/A School Mgr Faculty Mgr

Filters amended N/A Yes _____

New filters: _____

Replaced user removed N/A Yes UserID: _____

Test Setup:

Password reset: N/A Yes Password: _____

Group amended N/A School Mgr Faculty Mgr

Filters amended N/A Yes _____

New filters: _____

Replaced user removed N/A Yes UserID: _____

Completed:

Finance System – Name Signature Date / /

Expenses – Name Signature Date / /

Budget System – Name Signature Date / /

Travel – Name Signature Date / /