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Completing a Finance Applications Access/Amendment Form

The form should be completed online and then printed out for authorisation by the relevant Faculty Manager (or equivalent).

SECTION A: USER DETAILS

Before you apply for access to the Finance Applications, it is essential that you have your Pheme account activated. *Non-University staff must also sign up for a Pheme ID.* The PeopleSoft usernames are matched to those listed in Pheme (the UWA Account Management System). Access to PeopleSoft will be completed when the user is listed in Pheme.

Request Type: For *Amend* or *Change of Name* request types, enter the existing **User ID** (e.g. JSMITH)

Section: Enter the Team Name or Job Function. This will be utilised in the Internal Funds Transfer system (to replace eTForms in 2012) to assist the Initiator in identifying *who to send the Transfer Request to*.

Enter as many details as you know. Fields highlighted in **red** are mandatory.

For example:

Request Type:	New Access [ ]	Amend Access [✓]	Name Change [ ]	Existing User ID	MCAINE		
Surname	Caine	Given Names	Michael Joseph				
Pheme ID[1]	mcaine	Employee ID	00054321				
Phone	6488 9876	Email	michael.caine@uwa.edu.au				
Section	Administration	School / Area	School of Film and Television	MBDP	M333		

[1] Non-University staff must sign up for a Pheme ID

SECTION B: ACCESS – complete B1 **or** B2

B1: Copy Access from Existing User

If the access required is not the same as an existing user's, select *N/A* and complete Section B2.

If a new user is required to **replace an existing user** who has (or is about to) leave UWA:

- Select *Replace* and enter the **User ID** of the previous incumbent.
- Select the relevant access to be copied (tick all that apply).
- Complete Sections B3 (EMS) & C (Authorisation).
- Complete a Deletion Form for the user leaving UWA.

Note: If the user to be replaced has already moved to another section of UWA and submitted an Access Amendment Form, then the access CANNOT be copied – please complete Section B2 instead.

If a new user is required to **perform the same function** with the same access an existing user:

- Select *Clone* and enter the **User ID** to be cloned.
- Select the relevant access to be copied (tick all that apply).
- Complete Sections B3 (EMS) & C (Authorisation).

B2: User Access

If the new or amended access cannot be replicated by copying access from an existing user, then complete Section B2. Please complete every part, even if you already have access to a module that requires no change.

Primary Business Unit: This should be the principal BU and the default value in Search screens.

Other Business Unit Access:
Faculty wide: allows the user to perform their role across the whole Faculty
School: allows the user to perform their role across the School/area only
BU: allows the user to perform their role across the Primary BU only
UWA: only granted to users whose role requires UWA-wide reporting & enquiry

Travel Requisition (Trobexis): Complete as required

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Finance Modules (PeopleSoft):

General Ledger:

Research Reporting:
Limited access, allowing the user to run reports for Project/Grants in which they are the Manager.

Reporting & Enquiry:
Allows user to run standard reports & enquiries only

Finance Officer:
Allows the user to process journals, as well as run standard reports & enquiries

PG Mgr:
Same as Finance Officer, plus ability to update Project/Grant Manager & Report Key fields

Purchasing:

Note: In accordance with the Segregation of Duties Policy and University endorsed Procurement Design Model PeopleSoft users should only have access to either Purchase Orders **or** Receipts.

None:
No additional access to Purchasing or Receipting

Purchase Orders:
Access to create Purchase Orders and ability to view but not create Receipts (user must have a minimum of Band Level 6)

Receipts:
Access to create Receipts and ability to view but not create Purchase Orders

*Both **(Not available if BU is processing invoicing using three way matching)**:*
Access to create both Purchase Orders and Receipts

eTForm: User must have a minimum of Band Level 6 for *Yes* option

Delegated Bulk Invoice Approval: User must have a minimum of Band Level 6 for *Approval* option

Budget System (Advisor):

Select the appropriate access for the Budget System and enter the relevant combination of Business Units, School/Area(s) and Faculty required. *Note: Faculty ID(s) should only be selected if the access group is Faculty Manager.*

B2 (continued)

Budget System N/A ☐ School Manager ☑ Faculty Manager ☐

	BU, **Area** or **Fac**[4] 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.	Area/School	13100	Library
2.	BU	94100	CBU Library
3.	BU	02060	Information Services Division

B3: EMS (Expense Management System)

Access Required:

Proxy:
Allows the user to submit transactions and run reports for specified cardholders (list details)

Manager:
Allows the user to run reports for cardholders and monitor EMS transactions.

Manager/Approver:
Allows the user to run reports for cardholders (list details) and approve Expense Reports online.

Cardholder Details: Enter all relevant Cardholder Names & Employee IDs for *Proxy* or *Manager/Approver* access.

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SECTION C: AUTHORISATION

Complete as many of the details as possible online before printing out the form. The remaining details can be hand-written, ensuring that the Name is clearly legible. The form should then be signed and dated by the relevant Faculty Manager (or equivalent) on **both pages 1 and 2**.

The completed form should be forwarded to Client Services, Financial Services M449 through internal mail. Please allow one week for your access to be processed. Once granted you will be contacted by Client Services.