



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 Amend Access Name Change Existing User ID _____

Surname _____ Given names _____
 Faculty / division _____ School / section _____
 UWA phone number _____ UWA email address _____
 Staff number

Pheme ID¹ _____ MBDP _____
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 _____

N/A <input type="checkbox"/>	Replace ² <input type="checkbox"/>	Clone <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			Travel Req	Finance Modules	Budget System			

² Deletion Form must be completed for previous user Access to be copied for which system(s)?

OR (excludes EMS – complete B3 in addition to B1 or B2)

B2: User Access

Business Units Primary Business Unit ID: 5 digit BU code
 Level of BU Access: Faculty-wide School/Area BU only UWA

Travel Requisition Travel Arranger: No Yes Travel Workflow: Enquiry Maintenance³

Finance Modules **General Ledger:** Research Reporting Reporting & Enquiry Finance Officer PG Mgr
Purchasing: None Purchase Orders **or** Receiving **or** Both (non P2P)
 Access to other Users' POs? User ID _____ User ID _____
 User ID _____ User ID _____
Internal Funds Transfer:³ No Yes IFT Use⁴ _____
Delegated Bulk Invoice Approval:³ None Approval

³ Note: Minimum Band Level 6 required for Travel Maintenance, IFT and Delegated Bulk Invoice Approval
⁴ IFT Use: To identify which user within the BU the IFT should be sent to, e.g. "Main IFT User", "Software Purchases"

Continued over page

*AUTHORISER SIGNATURE	<input style="width: 95%;" type="text"/>	DATE	<input style="width: 95%;" type="text"/>
* Ensure both pages are signed			



Finance Applications Access/Amendment Form (continued)

B2 (continued)

Budget & Forecasting Application

N/A

Finance

Capital

Workforce

Faculty (or School)
Hierarchy Level

ID of Faculty
(or School/Area)

Name of Faculty (or School/Area)

- | | | | |
|----|--|--|--|
| 1. | | | |
| 2. | | | |
| 3. | | | |
| 4. | | | |
| 5. | | | |

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) **PHONE**

POSITION **BAND LEVEL**

EMAIL ADDRESS **MBDP**

SCHOOL/FAC NAME

*** SIGNATURE** **DATE**

* 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

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

➤ **Roles:** Roles names updated? N/A

<i>General Ledger:</i>				
	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 Purchase 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"/>

IFT Access N/A UFS_IPT_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 & Forecasting Application: N/A

Smart View installed Notes _____

Production Setup: Shared Services

UWA_Allusers All users

Planning_App_Allusers All users

Employee_Users for Workforce only

Hierarchy Applied Ent_ Ent_ Ent_
Ent_ Ent_ Ent_

Deactivate Replaced user N/A Shared Services removed PHEME ID: _____

Test Setup: Shared Services

UWA_Allusers All users

Planning_App_Allusers All users

Employee_Users for Workforce only

Hierarchy Applied Ent_ Ent_ Ent_
Ent_ Ent_ Ent_

Deactivate Replaced user N/A Shared Services removed PHEME ID: _____

Completed:

Finance System – Name Signature Date / /

Expenses – Name Signature Date / /

Budget System – Name Signature Date / /

Travel – Name Signature Date / /