

Access / Amendment for Finance Systems

Staff member to complete Sections A and B then forward to their appropriate Manager / Supervisor for authorisation (Section C). Form to be submitted via the ServiceNow portal. Notification will be sent to the user when processed by the Finance Systems Team

Section A: User Profile

Request Type		<input type="text"/>		
Name:		School/Directorate:		
Network User ID:		Phone:		
Email:		Position Title:		
Change of Name (if applicable)				
Old Name:		New Name:		
Old Network User ID:		New Network User ID:		
Change of Position to new School/Directorate (if applicable)				
Please list the Dept and/or Project Codes that are to be <u>removed</u> from your profile:				
Roles, Access & Training Requirements - myFinance				
Pre-requisite Training: "Introduction to myFinance" on Moodle			Date completed:	
Module Access		Please list the Dept and/or Project Codes or School/ Directorate you require access to	Approver? YES / NO	Training Completed
eProcurement	<input type="checkbox"/>		<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
Billing	<input type="checkbox"/>		<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
Journals	<input type="checkbox"/>		<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>

Financial Delegation/DPO (Please refer to the Financial Delegations policy)		
\$1,000 <input type="checkbox"/>	\$5,000 <input type="checkbox"/>	\$150,000 <input type="checkbox"/>
\$150,000+ <input type="checkbox"/>	Other (specify):	

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Authorised by: Chief Operating Officer / CFO
 Document Owner: Associate Director, Financial Accounting & Systems
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Financial Operations

Procurement Setup (if applying for eProcurement access)		
Ship To Address details:	Campus:	Department:
Building:	Floor:	Room:
Other Buyers whose Requisitions you need access to:		
User ID:	User ID:	User ID:
User ID:	User ID:	User ID:

Roles Requirements - MagiQ PowerBudget		
Tab Access		Please list the Dept and/or Project Codes or School/ Directorate you require access to
Financial/AP/PO/GL/ Concur Expense	<input type="checkbox"/>	
Student (FIN002) / Dashboard	<input type="checkbox"/>	
Recruitment/Dashboard	<input type="checkbox"/>	
Other (specify):		

Concur	
Will you be an approver in Concur	<input type="text"/>

Section B: Declaration

I am aware of my responsibilities as a Financial Delegate (if applicable) and system user

Signed: _____

Date: _____

(Nominated Officer)

Section C: Authorisation

Approved by (name):	
Title:	School/Directorate:
Signature:	Date:

This Authority will remain until revoked. All change requests can be made via ServiceNow

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Financial Operations

Section D: Finance / Systems Support use only

Finance Use Only:			
Role Name	Route Control	Add	Remove
UB S Executive Officer		<input type="checkbox"/>	<input type="checkbox"/>
UB S Financial Delegate		<input type="checkbox"/>	<input type="checkbox"/>
UB W Approver – Bill Lvl 1		<input type="checkbox"/>	<input type="checkbox"/>
UB S AR Customer Maintenance		<input type="checkbox"/>	<input type="checkbox"/>
UB S Admin Officer		<input type="checkbox"/>	<input type="checkbox"/>
UB S BI Specialist		<input type="checkbox"/>	<input type="checkbox"/>
UB S Requis/UB S AP Vend Maint		<input type="checkbox"/>	<input type="checkbox"/>
UB S Senior University Officer		<input type="checkbox"/>	<input type="checkbox"/>
UB W Approver – Computer		<input type="checkbox"/>	<input type="checkbox"/>
UB W Approver – Fin Lvl #__		<input type="checkbox"/>	<input type="checkbox"/>
UB W Approver – Photocopier		<input type="checkbox"/>	<input type="checkbox"/>
UB W Approver – Phys Resources		<input type="checkbox"/>	<input type="checkbox"/>
UBCPEOPLESOFTUSER ROLE		<input type="checkbox"/>	<input type="checkbox"/>

Systems Support Use Only:						
Please Tick:	User Profile:	Email updated:	Roles assigned:	Route controls:	User Preferences:	Dept by User ID:
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes:						
Processed by:						
Name:			Signature:		Date:	

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