

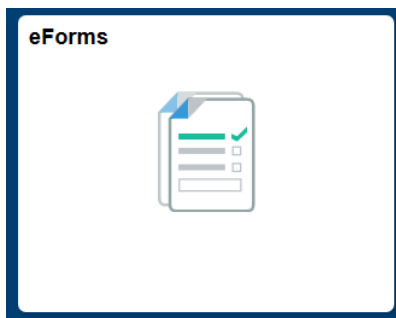
# Initiating a Finance System Access Request eform

## Introduction

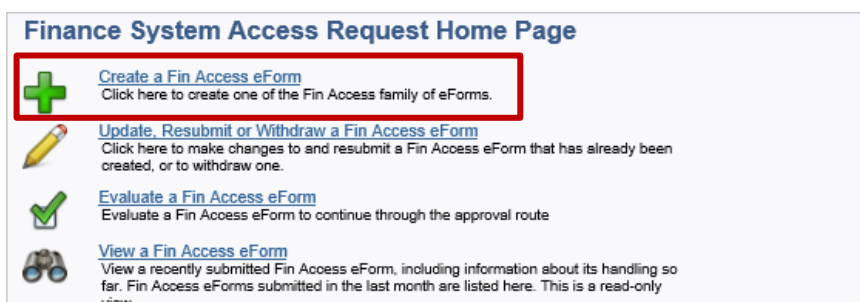
To request additional roles in the Finance System, you need to submit a Finance System Request Access Form. If you are requesting ePro access refer to the [ePro guide](#), for all other access requests use this procedure.

## Procedure

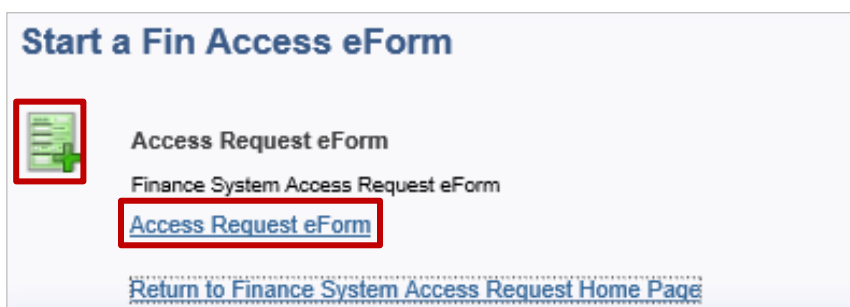
1. Go to <http://finance.adelaide.edu.au/> (or click on the grey ePro button on the Finance homepage)
2. Log in using your normal Staff ID and Password
3. Click on the eForms tile



4. Then **Finance System Access**
5. Click **Create a Fin Access eForm**



6. Click the  icon or **Access Request eForm**



7. Enter your university ID number in the **User ID** field (including the 'a'). Click **Search**

User Lookup Search  
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

User ID: begins with a1234567

User Name (Last Name, First Name): begins with

Case Sensitive

Search Clear Basic Search Save Search Criteria

8. The eForm will open with some of your details pre-filled. Complete the following sections and fields:

**Employee Information**

- Review the pre-filled details. You can change your **Primary Department** code and or **email** if incorrect.
- You can also add any personal details that are not pre-filled such as your **email ID**
- Insert your Primary Department ID number. You can search for the number by clicking if you only know the department name

Employee Information

Name: [pre-filled] Position Number: [pre-filled]

User ID: [pre-filled] Position Title: [pre-filled]

eForm ID: [pre-filled]

\*Email ID: [pre-filled]

\*Primary Department: [dropdown] Technology - Capital

**Form Action**

- Select the appropriate **Justification** from the dropdown menu (eg **New** if you are a new user)

Form Action

Justification: New

Are you applying to copy an existing user?

Name of user to copy

Request Type

Is this request temporary?

- Tick the appropriate **Request Type** (a new user will select **Addition (new user)**) no change if **Amendment** is ticked

Form Action

Justification: [dropdown]

Are you replacing/backfilling an existing user in your department?  Yes  No

Replace/Backfill User: [text box]

Request Type:  Addition (new user)  Amendment  Remove All Access

Is this request temporary?  Yes  No

Effective Date From: [text box] Date To: [text box]

Below is a list of Roles within Central Finance area. These will only be granted if required for your Finance Role eg: Faculty Finance Manager, Research Accountant

- ▶ General Roles
- ▶ Purchasing Roles
- ▶ AR/Billing Roles
- ▶ Accounts Payable Roles
- ▶ Accounting/Reporting Roles
- ▶ Project Roles
- ▶ Grants/Contract Management Roles
- ▶ Administration/Misc. Roles

9. Read the **Access and Usage Declaration - PeopleSoft Finance** and tick the **I Agree** box. If you do not agree with this declaration do not submit this form and discuss this with your manager.

**Access & Usage Declaration – PeopleSoft Finance**

The University's Financial Management System/s contain personal information of individuals and financial information that is confidential to the University. You should only access and use information as necessary for you to undertake your role at the University in accordance to policy and procedures. You must not share your password or allow another person to process, approve or submit requests under your personal log in. Inappropriate access to or use of personal or confidential information would be a breach of your obligations to the University and maybe subject to disciplinary action.

\*I Agree

10. If you don't have an email approval attachment, please enter your justification and supervisors name in the comment field prior to clicking **Submit**

**Comments**





Your Comment:

You will receive an automated email when access has been granted.

You can check the status of your request at any time.

1. Repeat steps 1 – 4
2. Click on View a Fin Access eForm

**Finance System Access Request Home Page**

-  [Create a Fin Access eForm](#)  
Click here to create one of the Fin Access family of eForms.
-  [Update, Resubmit or Withdraw a Fin Access eForm](#)  
Click here to make changes to and resubmit a Fin Access eForm that has already been created, or to withdraw one.
-  [Evaluate a Fin Access eForm](#)  
Evaluate a Fin Access eForm to continue through the approval route
-  [View a Fin Access eForm](#)  
View a recently submitted Fin Access eForm, including information about its handling so far. Fin Access eForms submitted in the last month are listed here. This is a read-only view.

3. Remove the **date range**, enter your **Staff ID a number** in the **User ID** field

**View a Fin Access eForm**

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

**Search Criteria**

eForm ID begins with

Form Family begins with FSACCESS

Workflow Form Type begins with

Workflow Form Status =

**User ID begins with**

Description begins with

Form Key 3 begins with

Original Operator begins with

Originated Date From >= 14/07/2019

Originated Date Thru <=

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

4. Click on the eForm number link, click on [Next >>](#) at the bottom of the screen

Click on **Who can work this form**

Form Information		
eForm ID	24263	
Form Status	Pending	
Form Type	USERACCT	User Acct Form
Condition	DEFAULT	Default
Next Approver	the Workflow Administrator	
	<a href="#">Who can work this form?</a>	<a href="#">Form Messages</a>

5. It will show you whom the form is pending approval

Current Form Worklist Items		
	UOA_WFADMIN	Workflow Administrator GT Form <a href="mailto:finprosupport@adelaide.edu.au">finprosupport@adelaide.edu.au</a>

## Contact Us

For further support or questions, please contact the Finance and Procurement Support Team.  
Telephone: +61 8 8313 3414 Email [finprosupport@adelaide.edu.au](mailto:finprosupport@adelaide.edu.au)