

UNIVERSITY OF OTTAWA
Request for access to Financial System

Note: Requests for access must be renewed every time a person assumes a new position at the University requiring access to the financial system. Please print, send the form, duly completed and signed, to Information Technology by email at IT-accessmanagement@uottawa.ca

1. Type of Request		
New request access	Access modification	Remove access

2. User Identification		
Last name	First name	Employee number (e.g. 100XXXXXX)
Faculty, service, school	Department	Phone
Position Title	Email	If term employment, give termination date (mm/dd/yyyy):

3. Replacement: Is this employee replacing another employee in his/her role? If yes, remove system access for:	
Employee's name	Employee's number (e.g. 100XXXXXX)

4. User roles (BANNER)		
Purchasing		
Requisition entry	Requisition approval	
Accounts payable		
Invoice entry	Invoice approval	
General ledger		
Journal entries	View salary details	Summary by researcher (FastmyResearch)
Financial report (WebFocus)	Finance Reporting (FAST)	
Budget (Operating funds only)		
Fund transfer entry	Budget development	
Fund transfer approval	Budget development approval	
Purchasing card (PCARD)		
Transaction reconciliation	PCARD holder only	
Designated coordinator (For PCARD holders only) Name of the coordinator		
Cost centre generator		
Create new research centres	Create new capital centres	
Deposits FGADCSR		
Deposit entry	Deposit approval	

5. Organization-Fund/ Organization security			
Funds		Data entry (yes, no, N/A)	Data inquiry (yes, no, N/A)
Operating Fund			
Revenue Prod. Funds			
Ancil. Serv. Funds			
Research Funds			
Trust Funds			
Endowment Funds – Capital			
Endowment Funds – Interest			
Endowment Funds – Expend			
Organization			
Include	Exclude	Data entry (yes, no, N/A)	Data inquiry (yes, no, N/A)

6. User roles (SCIQUEST)									
Important: All approvers must confirm that the requisition information is accurate, complete and complies with the University’s policies, procedures and funding requirements.									
Requisitioner Receive and complete carts from shoppers; submit for approval; create receipts; request a change order; can shop)									
Indicate your list of research funds Principal Investigator’s initials required (as per the delegation of authority form)									
Indicate your list of organizations if not related to research									
Approver – Department Level Can approve, reject, edit or return the requisition; Create receipts									
Approver – Faculty or Service Level Can approve, reject, edit or return the requisition; Create receipts									
NSF Approver – Level 1 (Financial Officers) Investigate and document the reason for NSF situation; Can approve, reject, edit or return the requisition; May require a budget transfer									
Approver – Regional Buyer Approve up to \$50K; Can approve, reject, edit or return the requisition									

6. User roles (SCIQUEST)	
Important: All approvers must confirm that the requisition information is accurate, complete and complies with the University's policies, procedures and funding requirements.	
Approver – Change Order Request Approve the change to the PO	
Approver – Audio-Visual Commodity Can approve, reject, edit or return the requisition	
Approver – IT Commodity Can approve, reject, edit or return the requisition; Printer Software – Server Application Software – Desktop Desktop Computer Server and Storage Equipment	
Approver – Furniture Commodity Can approve, reject, edit or return the requisition	
Approver – Restricted and Controlled Goods Commodity Can approve, reject, edit or return the requisition Chemical Weapons (Type 1) Chemical Weapons (Type 2) Controlled Goods Radioactive Materials	
Approver – Security Sensitive Biological Agents Commodity Can approve, reject, edit or return the requisition	
Campus Accounts Payable Handle and resolve matched exception invoices; Enter < invoice form>; Submit invoices for approval	
View orders and invoices (check one box only) View My orders and invoices only View All the Faculty/Service orders and invoices	

7. Declaration	
All University of Ottawa employees with administrative responsibilities must abide by the following rules:	
<ol style="list-style-type: none"> 1. <i>I will respect the confidentiality of information received in the course of duty and I will not use it for my personal gain.</i> 2. <i>I am responsible to retain the confidentiality of my personal computer passwords. I will not pass them on to anyone else under any circumstance.</i> 3. <i>I will only access the account provided to me by the University and I will respect all the attached restrictions.</i> 	
_____	_____
<i>Signature (Requester)</i>	<i>Date (mm/dd/yyyy)</i>

8. Authorization		
_____	_____	_____
<i>Chief administrative officer, director of service or delegate</i>	<i>Signature</i>	<i>Date (mm/dd/yyyy)</i>

9. Information Technology	
_____	_____
<i>Signature</i>	<i>Date completed (mm/dd/yyyy)</i>

10. For internal use only	
Confirmation email	User account