REQUEST FOR ACCESS TO THE AMS SYSTEM – <u>Central FIS/B6 Roles</u>

Use this form to request Central FIS Roles -- *including Accounts Receivable/Payable; Senior Financial Officer/ Budge Transfer; Profit Center Accounting; Procurement Services department; Planning and Budget department; Fast Team Role; department Hierarchy; Payroll Distribution/B6 & Batch updates.*

Current Date _____ 20 _____   Effective Date_____20____

INSTRUCTIONS	
i. Print clearly & complete all applicable sections. ii. Keep a copy of this form for your records.	**AMS System Access** **Email to:** access.easi@utoronto.ca

SECTION 1: APPLICANT INFORMATION

<u>Check one:</u>   ❐ Update existing AMS System User   ❐ New AMS System User

❐ **CASUAL EMPLOYEE:** <u>Casual Employed By</u> – ❐ U/Temp   ❐ Direct by department   ❐ External Co.

Start Date: _____   **Termination Date:** _____

AMS SYSTEM USER ID	Personnel No.	Staff Appointed Employee Position No.	Org Unit

Applicant Name: _____   _____ _____
                            Last name (Please print)   *First name*   *Initial*

Faculty/
Division/Campus: _____   Department _____

Job title: _____   Phone #: _____

Applicant Email: _____   Fax #: _____

Contact Person: _____   Contact Person Email: _____

CENTRAL FIS: <u>CENTRAL FIS/B6 ROLES</u>

SECTION 2: FIS ROLES – SELECT THE ACCESS ROLE(S) REQUIRED FOR YOUR POSITION

SELECT	ROLE	DESCRIPTION
Role 1	**ACCOUNTS RECEIVABLE**	All Accounts Receivable activities.
Role 2	**ACCOUNTS PAYABLE**	All Accounts Payable activities.
Role 3	**SENIOR FINANCIAL OFFICER:** BUDGET TRANSFER	Contains all the update and display financial accounting functions contained in the divisional Business Officer Role plus the ability to Create Funds Management Budget Transfers. This role normally provided to Senior Financial Officers. <u>Please indicate your department for Budget Transfers.</u> Department: _____
Role 4	**PROFIT CENTER ACCOUNTING**	Full update access to the Profit Center Accounting module.

Role 5	**PROCUREMENT SERVICES**	Procurement Services department specific role.
Role 6	**PLANNING AND BUDGET**	Access to FM functions, special master data access, special B6.
Role 7	**FAST TEAM**	The Financial Services Team (FAST TEAM) specific profiles.
Other		

SECTION 3: PAYROLL DISTRIBUTION REPORTING – Check Role if required for your position.		
☐	PAYROLL DISTRIBUTION REPORT	• Access to run the Payroll Distribution Report.

SECTION 4: BATCH UPDATE FOR ERROR PROCESSING – Check Role if required for your position.		
☐	BATCH UPDATE FOR ERROR PROCESSING	• Access to batch update for error processing. This special function is used to update errors created when files are imported into SAP R/3 via an interface. If you require this access please provide the name of the exact file to which you need access. ⇒ Name of Batch File: _____

Department Automated Hierarchy

SECTION 5: DEPARTMENT AUTOMATED HIERARCHY
Your Automated Hierarchy controls which cost centers or fund centers you can run reports on. The Automated Hierarchy will automatically update about three days after the FAST Team or Research Services creates new FC/CCs or moves existing FC/CCs.

We require an Org Unit #, a Parent CFC and a CC Node or Group number to process.

To request a single FC or a single CC, please attach the Single Fund Centre/ Cost Centre Add/Delete form.

AUTOMATED HIERARCHY	_____ *Faculty & Department*	_____ *Org Unit #*	_____ *Parent CFC #*	_____ *CC Node/Group #*

AUTOMATED HIERARCHY	_____ *Faculty & Department*	_____ *Org Unit #*	_____ *Parent CFC #*	_____ *CC Node/Group #*

Access to the B6 (Salary Planning Application) – <u>CENTRAL B6</u>

SECTION 6: B6 ROLES – SELECT THE ACCESS ROLE(S) REQUIRED FOR YOUR POSITION		
SELECT	**ROLE**	**DESCRIPTION**
1.	Business Officer: Department (DISPLAY and UPDATE)	• Provides access to department-level functionality for maintenance of annual FTE/salary planning details and applicable salary increases. Provides department-specific CFC/CC salary and FTE reports.
2.	Faculty (DISPLAY and UPDATE)	• Provides access to division-level functionality for maintenance and submission of divisional FTE/salary planning details and applicable salary increases. Provides division-specific CFC/CC salary and FTE reports.
3.	Planning & Budget (DISPLAY and UPDATE)	• Provides institution-level access and functionality for planning of annual salary budget requirements. Provides institution-wide reporting and budget-rules administration.

Signature Authorization

_____   _____
Your signature   *Date*

_____ _____ _____
Department Head's Name (Please print)   *Title*   *Univ.Tel.#*

_____   _____
Department Head's Signature   *Date*