

## INFORMATION + TECHNOLOGY SERVICES

### REQUEST FOR ACCESS TO THE AMS SYSTEM

#### Access to Service Management for Facilities & Services Staff – SM F&S Roles

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](mailto:access.easi@utoronto.ca)

#### SECTION 1: APPLICANT INFORMATION

**Check one:**     Update existing AMS System User     New AMS System User

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

Start Date: \_\_\_\_\_                      Termination Date: \_\_\_\_\_

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AMS SYSTEM USER ID

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U/T Personnel No.

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Staff Appointed  
Employee Position No.

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Org Unit

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

Faculty/  
Division/Campus:                      \_\_\_\_\_                      Department \_\_\_\_\_

Job title:                      \_\_\_\_\_                      Phone No: \_\_\_\_\_

Applicant Email:                      \_\_\_\_\_                      Fax No: \_\_\_\_\_

Contact Person:                      \_\_\_\_\_                      Contact Person  
Email: \_\_\_\_\_

#### ACCESS TO SERVICE MANAGEMENT FOR FACILITIES & SERVICES STAFF – SM: F&S Roles

**Section 2:** Select the Service Management Facilities and Services Role/s required for your position.

SELECT	ROLE	DESCRIPTION
Role 1	Building Manager	Includes the following functions: <ul style="list-style-type: none"> <li>SERVICE ORDERS: Create, change, approve and display.</li> <li>REPORTS: lists and displays management reports.</li> <li>SM AND FINANCIAL MASTER DATA: display.</li> <li>PURCHASE ORDERS: Display.</li> <li>PURCHASE REQUISITIONS: create, change, display purchase requisitions.</li> </ul>
Role 2	3000 Operator	Includes the following functions: <ul style="list-style-type: none"> <li>SERVICE ORDERS: Create and change service orders</li> <li>REPORTS: service order reports.</li> <li>GOODS ISSUE: enter goods issues to service orders.</li> <li>PURCHASE REQUISITIONS: create, change, display purchase requisitions.</li> </ul>
Role 3	Accounting	Includes the following functions: <ul style="list-style-type: none"> <li>INVOICES &amp; JOURNALS: allows posting to invoices &amp; journals.</li> <li>F&amp;S INTERNAL CUSTOMERS: create, change, display F&amp;S internal customers.</li> <li>SERVICE ORDERS: display service order.</li> <li>REPORT: access billing rejects report.</li> <li>PURCHASE ORDERS: create, change, display purchase orders.</li> </ul>

Role 4	Stores	Includes the following functions: <ul style="list-style-type: none"> <li>• PURCHASE ORDER: all activities, including goods receipts;</li> <li>• GOODS ISSUE: enter goods issues to service orders.</li> <li>• SERVICE ORDERS: display service orders;</li> <li>• PHYSICAL INVENTORY: physical inventory activities including create physical inventory documents &amp; enter counts.</li> </ul>
Role 5	Trades	Includes the following functions: <ul style="list-style-type: none"> <li>• SERVICE ORDERS: Create and update service orders, sub-orders, operations, and schedules;</li> <li>• SERVICE ORDERS: display service orders.</li> <li>• CHANGE REPORTS: display change reports.</li> <li>• PURCHASE ORDERS: display purchase orders.</li> <li>• PURCHASE REQUISITIONS: create, change, display purchase requisitions.</li> </ul>
Role 6	Trades Utilities	<ul style="list-style-type: none"> <li>• SERVICE ORDERS: Create and update service orders, sub-orders, operations, and schedules;</li> <li>• SERVICE ORDERS: display service orders.</li> <li>• CHANGE REPORTS: display change reports.</li> <li>• PURCHASE ORDERS: display purchase orders</li> <li>• PURCHASE REQUISITIONS: create, change, display purchase requisitions.</li> <li>• SERVICE REQUESTS: Create service requests.</li> </ul>
Role 7	Logistics	Includes the following functions: <ul style="list-style-type: none"> <li>• ACCOUNTS PAYABLE: Post A/P invoices.</li> <li>• PURCHASE ORDERS: Create and display purchase orders.</li> <li>• INVOICES AND GOOD RECEIPTS: post invoices and good receipts for purchase orders.</li> <li>• PURCHASE REQUISITIONS: display purchase requisitions.</li> </ul>
Role 8	Customer Service Billing	<ul style="list-style-type: none"> <li>• DOCUMENT MAINTENANCE:</li> </ul>
Role 9	Customer Service Material Master	<ul style="list-style-type: none"> <li>• MATERIAL MASTER CREATE:</li> </ul>
Role 10	Payroll Distribution Report	<ul style="list-style-type: none"> <li>• PRINT MONTH-END PAYROLL DISTRIBUTION REPORT</li> </ul>
Role 11	FINANCIAL SERVICES DEPT ONLY: F&S Customer Service	<u>FOR FINANCIAL SERVICES DEPARTMENT:</u> <ul style="list-style-type: none"> <li>• Includes the ability to display Service Management functions.</li> </ul>
Other		

**SECTION 3: SIGNATURE** -- PLEASE SIGN AND OBTAIN DEPARTMENT HEAD'S SIGNATURE OF APPROVAL FOR AMS ACCESS REQUESTED

**Signature Authorization**

\_\_\_\_\_  
*Applicant signature*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Department Head's Name (Please print)*

\_\_\_\_\_  
*Title*

\_\_\_\_\_  
*Univ.Tel.#*

\_\_\_\_\_  
*Department Head's Signature*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
**Darrel Fernandopulle Signature required for CS PTS Approver role**  
 C30:CS\_PTS\_APPROVER role

\_\_\_\_\_  
*Date*