INFORMATION + TECHNOLOGY SERVICES

REQUEST FOR ACCESS TO THE AMS SYSTEM – FINANCIAL INFORMATION SYSTEM -- Div FIS/B6

Current Date _____ 20 _____ Effective Date_____20____

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

SECTION 1: APPLICANT INFORMATION/ACTION REQUIRED

Check one: ❒ Set Up New User ❒ Department Move ❒ Update existing AMS System User

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

Start Date: _____ *Termination Date: _____
REQUIRED

AMS System User ID	Personnel No.	Staff Appointed Employee Position No.	Org Unit

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

Your Location--Faculty /Division or Campus: _____ Department: _____

Job title: _____ Phone #: _____

Applicant Email: _____ Fax #: _____

Contact Person: _____ Email: _____

Access to the Financial Information System: Divisional FIS & B6

SECTION 2: FIS ROLES – CIRCLE THE ACCESS ROLE/S REQUIRED FOR YOUR POSITION.

Role 1	**BUSINESS OFFICER:** FINANCIAL ACCOUNTING **UPDATE & DISPLAY** **ALL FUNCTIONS**	The Business Officer Financial Accounting Role contains all of the functions listed below and cannot be requested separately. • GL account postings (debit memos, journal entries, cash deposits etc.) • Accounts Payable documents (non-PO related) (including invoices, credit memos, cheque request, personal expense request, correspondence request etc.) - all activities. • Display Standard Vendor Master Records. • Update Debit Memos Only. • Cost Centre Planning. • Manual Reserves - all activities. • Departmental Purchasing - Purchase Orders - all activities, including Goods/invoice receipts. • Expense Reimbursement Direct Deposit (ERDD)
Role 2	**BUSINESS ADMINISTRATOR:** FINANCIAL ACCOUNTING **DISPLAY ONLY** **ALL FUNCTIONS**	• **DISPLAY ONLY** version of the Business Officer Financial Accounting Role. It does not allow any postings or updates. It provides for display only of all transactions and reports as listed in Role 1.
Role 3	**UTSC - FIS BUS OFFICER**	• FIS Update functions in select areas.
Role 4	**SCHOOL CONTINUING STUDY:** PROFIT CENTER ACCOUNTING	• Access to the Profit Center Accounting module. This module is used only by a few departments – such as the School of Continuing Studies.

Role 5	**PHYSICS:** Profiles unique to Physics:	F:R_FI_PTS FI: Div'l/Dept - Company code UOFT, display only. I:PM_PTS_A Service management for PTS. I:P_ANL_PTS PTS Plant Analysis. S:45B_UPGRDE Cross Application Access for ALL Users. S:COMMON Standard Comp. Profile for all AMS Users.
*OTHER	**FUNCTION YOU REQUIRE:**	_____ Transaction No. _____

Section 3: Payroll Distribution Reporting – Circle Role if required for your position.

❒	**PAYROLL DISTRIBUTION REPORT**	• Access to run the Payroll Distribution Report.

Section 4: Batch Update for Error Processing – Circle 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 Batch name of the exact file to which you need access. ⇒ **Batch Name:** _____

Department Automated Hierarchy

Section 5: Department Automated Hierarchy -- Your Automated Hierarchy controls which cost centers or fund centers you can VIEW and 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. Note: We require an Org Unit #, a Parent CFC and a CC Node or Group number to create Department Hierarchies.

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

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

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

Access to the B6 (Salary Planning Application)

Section 6: B6 Roles – Circle Role 1 or Role 2.

SELECT	ROLE	DESCRIPTION
Role 1	Business Officer: Department (DISPLAY & 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.
Role 2	Financial Administrator Faculty (DISPLAY & 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.

SECTION 7: 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 & Department* *Univ.Tel.#*

_____ _____
Department Head's Signature *Date*