**eFinancials Access Application Form**

This application form is used to setup new users within eProcurement system. Please complete the details below, including the appropriate authorisation. Once all information is complete, form can be submitted to finance.systems@ucd.ie .Note the following needs based on the type of user being created:

* **New User & New Role**: If you are looking for a user to be created that has unique needs, please complete the form in its entirety (Section 1-3/4\*)
* **New User & Existing Role**: If you are adding to or replacing an existing role, please review access of a user with this role, then you can complete Section 1 & Section 2 of this form only

**\*Users External to Bursars Office**: Please complete section 1,2 & 3 only

**\*Users Internal to Bursars Office**: Please complete section 1,2 & 4

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| **Section 1: eProcurement User Details** |
| Personnel Number |  |
| Full Name (Incl. middle initial) |  |
| UCD Connect Username |  |
| UCD email |  |
| Position |  |
| School/Unit |  |
| Manager/Head of School/Unit UCD email |  |

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| **Section 2: Role Specifications** |
| Is this a new or existing role | New |[ ]  Existing |[ ]
| For existing role, state username in role currently |  |
| Is the current role holder exiting this role? | Yes |[ ]  No |[ ]
| Date the current role holder is exiting role? |  |

**Users External to Bursars Office**: Please proceed to complete section 3

**Users Internal to Bursars Office**: Please proceed to complete section 4

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| **Section 3: Access Requirements (Users External to Bursars Office)** |
| Access to Finance Reports only | Yes |[ ]  No |[ ]
| Access to Review eFinancials System | Yes |[ ]  No |[ ]
| General Ledger Read Only Access | Yes |[ ]  No |[ ]
| Account Balance Set-Down | Yes |[ ]  No |[ ]
| Job Costing Step Down | Yes |[ ]  No |[ ]
| Chart of Accounts | Yes |[ ]  No |[ ]
| Supplier Enquiry Read Only Access | Yes |[ ]  No |[ ]
| POP Enquiry Access | Yes |[ ]  No |[ ]

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| **Section 3a: Access Levels – Hierarchy eg College, School, Cost Centre Specific** |
| Cost Centres Required |  |
| Account Codes Required |  |
| Specific Job Codes required |  |

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| **Section 3b: POP Module (processing Purchase Orders)** |
| **Ability to Originate Orders** | Yes |[ ]  No |[ ]
| Authority Level | € |
| Specify Cost Centres |  |
| Specify Job Codes |  |
| **Ability to Authorise Orders** | Yes |[ ]  No |[ ]
| Authority Level | € |
| Specify Cost Centres |  |
| Specify Job Codes |  |
| **Ability to Receipt Orders** | Yes |[ ]  No |[ ]
| Authority Level | € |
| Specify Cost Centres |  |
| Specify Job Codes |  |

Please note users with POP processing rights are given a tolerance level of €635 to change PO line values, if this level needs to be amended please advise:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| **Section 3c: Accounts Receivable Module** |
| Ability to Enter Invoices | Yes |[ ]  No |[ ]
| Access to Invoice Writer  | Yes |[ ]  No |[ ]
| Ability to Print/Post Invoices | Yes |[ ]  No |[ ]
| Ability to create Customer Standing Data | Yes |[ ]  No |[ ]
| Ability to create Product Standing Data | Yes |[ ]  No |[ ]
| Chart of Accounts | Yes |[ ]  No |[ ]
| Specify Cost Centres |  |
| Specify Job Codes |  |

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| **Section 4: Access Requirements (Users Internal to Bursars Office)** |
| Access to General Ledger | Yes |[ ]  No |[ ]
| Ability to post Cashbook Journals | Yes |[ ]  No |[ ]
| Ability to post General Journals | Yes |[ ]  No |[ ]
| Ability to post Budget Journals | Yes |[ ]  No |[ ]
| Access to Excel Uploader | Yes |[ ]  No |[ ]
| Access to Cfacs Interface | Yes |[ ]  No |[ ]
| Access to Payments Module | Yes |[ ]  No |[ ]
| Ability to create Standing Data – Suppliers | Yes |[ ]  No |[ ]
| Ability to Enter & Post Invoices – Supplier | Yes |[ ]  No |[ ]
| Ability to Process Payment Run | Yes |[ ]  No |[ ]
| Access to POP | Yes |[ ]  No |[ ]
| State function POP | Originate[ ]  | Authorise[ ]  | Receipt[ ]  |
| State authority levels (POP) | € |
| Specify Cost Centre |  |
| Specify Job Codes |  |
| Access to Accounts Receivable | Yes |[ ]  No |[ ]
| Access to System Administration | Yes |[ ]  No |[ ]

I understand the information available from the Financial System is confidential and may only be used for appropriate work related purposes. I have read and adhere to the confidentiality guidelines detailed in section C of the UCD Administrative Systems – Request for Access Form

Signature of Applicant \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of Authoriser(s)\*\*\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 *Authorisers include College Finance Mangers, Head of School/Unit or Budget Holder.*

*\*\*Receipt of the completed form from the appropriate authoriser(s) via email is accepted in lieu of a signature.*