Access to Finance Systems

User Guide For Requesters & Approvers
Step 1: Log into FlindersPro via Okta dashboard.

Once you are signed in, you will see the following screen:

Click on the image next to ‘Appian’ and then select ‘Finance Systems Access’ from the list to access the webform.

Alternatively, you may add the ‘Finance Systems Access’ chiclet in your Okta dashboard using the “Add Apps” function, and then access the webform.
Step 2: You will see the ‘MY TASKS’ screen to begin with. This screen shows outstanding tasks that are currently assigned to you as shown in the image below (see section 2).

Step 3: Once you click on section 3 in the image above, you will see the requests raised in the past. Please note that administrative staff will see all requests. Users/Supervisors will see the requests they have submitted or been involved in (e.g. supervisor approval).
Step 4: Click on ‘ACCESS REQUEST’ to view the new webform and start the new request.

Step 5: The ‘ACCESS REQUEST’ tab has the following sections:

1. **Finance Systems Access Request** – this is the title of the page.
2. **Employee details** – this section has details of the applicant for example email id, title, FAN, College/Portfolio and Business area. It also has details of the supervisor for example, position and email address. *The employee data comes from the HR database.* Applicants can enter their contact details manually including their supervisor’s phone number, which is an optional field.
3. **Access Request** – Users can Add, Amend or Remove Access from this section.
   a. Add: Use this option if you need to request access to systems you currently don’t have access to.
   b. Amend: Use this option if you need to amend access to systems you already have access to.
   c. Remove: Use this option if you need to remove access to systems you already have access to.
4. **Finance Support Page** – Users can refer to this page if they have any questions about finance and procurement services.

Step 6: If you want to request new access to a system you don’t already have, click on ‘New’ to start a new request. The ‘selection box’ will get highlighted in blue colour and an option to ‘Add System’ will appear as shown in section 4 (see image below). Sections 1 & 3 in the image below also provide information regarding the request. Section 5 lists the positions with a delegation for the authorisation of University expenditure by College and Portfolio.

Step 7: Once you click on ‘Add System’ a ‘New System Information’ box appears where you can make selection of the ‘System’, select ‘End date’ and add additional information pertaining to your request, if required.
Step 8: Please select a system from the drop-down menu as shown in the image below (see section 1).

Step 9: Please enter any additional comments regarding your access to this system while raising a request. You may provide information on the project, college or portfolio this access request pertains to. If known, you may also provide the details of a user (for e.g. full name, email address or FAN) with a similar access to what you need.

Step 9: In the case of ‘New and Amend’ request, once you select a system, for example, Technology One (Financials), the roles pertaining to that system will appear for you to choose as shown in section 2 (see image below). Please select an *End Date* as well as shown in section 1 (see image below). The ‘End Date’ is the date after which the relevant access is not required.
Step 10: Select all roles that apply based on your job requirement as shown in section 1 below. You can refer to the Finance Support Page for how to get further assistance, if required.

Step 11: You may add additional comments along with the request as shown in section 1 (see image below).
Step 12: Click on ‘Save system changes’ to save the entered system information.

Step 13: Once the system information is saved, you may review it before submitting the request as shown in the image below.

1. **System** – Shows you the system for which the request has been raised.
2. **Roles selected** – Shows the roles selected with the request.
3. **End date** – Shows the end date selected for the access.
4. **Info** – Indicates whether additional information has been provided for the system. ‘Remove’ (red cross) gives an option to review and remove a system. This can be done without cancelling the request.
5. **Add System** – Use this option if you wish to add another system within the same request.
6. **Save Draft or Submit** – Users can either save the draft for later or choose to submit the request if they are ready.
Step 14: User can view the request by clicking ‘View Requests’ as shown in section 1 and then clicking the link under the ‘Id’ field in section 2 (see image below).
SUPervisor Approval Process

Step 1: Supervisors get a notification via email when a request is pending for approval. Once they log on to the webform, they are able to view any pending requests in ‘My Tasks’.

Step 2: Supervisors can click on the task and review the request before approving or rejecting. Please see sections 1, 2 & 3 in the image below which shows details of the case progress and employee details.
Step 3: The next image shows details of the ‘access requested’ (See section 1). Supervisors can click on section 2 in the image below and ‘Add system’ on behalf of the employee if any additional accesses are required. Once the request has been reviewed and is ready for approval, click on section 3 and ‘Approve Request’.

Step 4: Once the application is approved, the requestor will be able to view the status of the request in ‘View requests’
Commonly Asked Questions

1. **How do I access Finance Systems Access on my mobile device?**
   Access the Finance Systems Access application by logging in directly to the Okta app via your mobile phone and then accessing “FlindersPro”, or search for the “Finance Systems Access” app on the Okta dashboard. Please note that once you click on “New” or “Amend”, you will need to scroll down to select the “Add System” button.

   Please note that the Appian mobile app is available for use as well.

2. **What is the difference between New, Amend & Remove?**
   Select “New” only when you need access to a system you do not already have access to.
   Select “Amend” only when you need to amend your access to a system you already have access to. In this case, you are altering your access rights to a system.
   Select “Remove”, only when you need to remove ALL your access to a system you already have access to.

   Please note that you can only select one type of access request at a time. If you need to create a new and an amend request, you will need to create two separate cases or requests.