

# Deprovision - Financial Systems Steps to take

**Danying He – Financial Accounting** 

- What needs to be reviewed
- Changing Financial Manager
- Closing Accounts
  - Operating Accounts
  - Specific Purpose Accounts

#### When to contact?

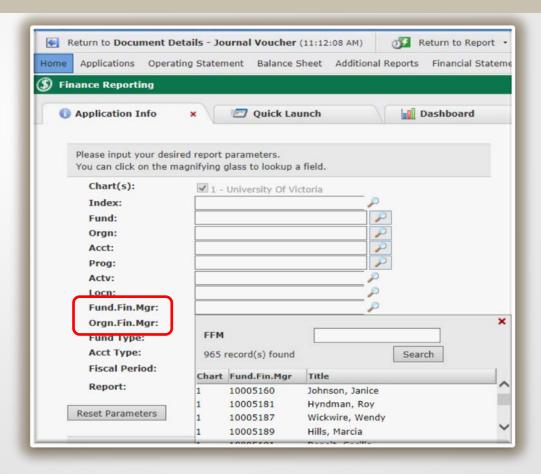
- An employee is changing position and access needs to be removed.
- An employee is leaving UVic.

Email provision@uvic.ca BEFORE changes occur.

#### What needs to be reviewed?

- Financial Manager (account holder)
- FAST Finance viewing access
- Workflow AP Approval queue

- Financial Manager (account holder)
- Is a user the financial manager for any accounts?



Financial Manager (account holder)

 Deprovisioning can only occur when a user is not a Financial Manager.

Financial Manager (Account Holder)

### **Change Financial Manager**

 If the Financial Manager needs to be changed, fill out the online "<u>Financial system access form</u>" available on the Accounting Services website.

**Research accounts – contact Research Accounting** 

Financial Manager (Account Holder)

### **Closing an account**

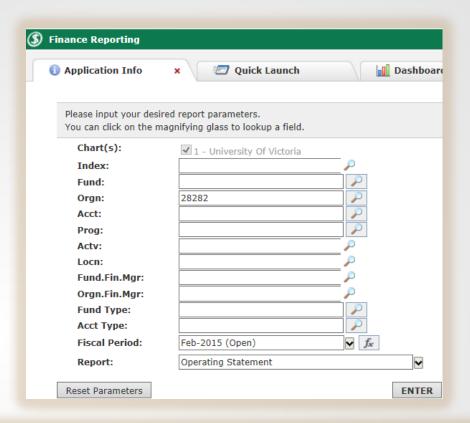
If account(s)needs to be closed, check the
account balance and make sure it is zero before
sending a request to <a href="mailto:finadmin@uvic.ca">finadmin@uvic.ca</a> to have
the account(s) closed.

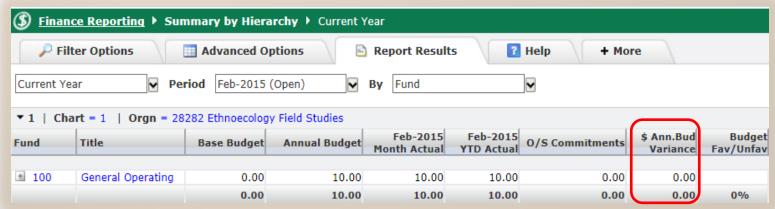
**Research accounts – contact Research Accounting** 

Financial Manager (Account Holder)

### **Operating Accounts**

 For 10000 operating accounts, don't forget to check the balance under 11310 Budgetary
 Saving – Carry Over Funds

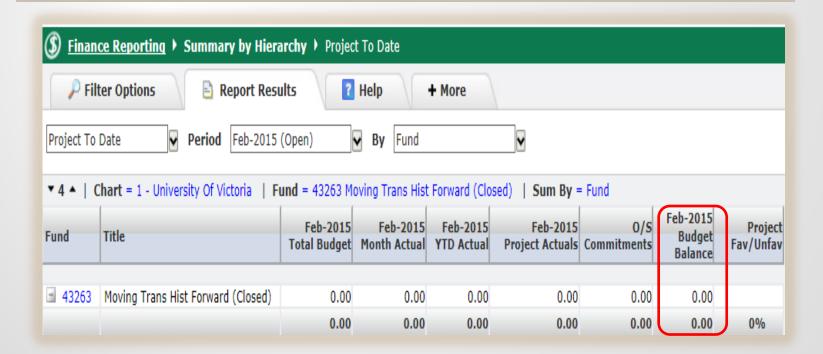




Financial Manager (Account Holder)

#### **Specific purpose accounts**

check "Budget Balance".



- FAST Finance viewing access
- Workflow AP Approval queue

We are working to create reports that department users can run in new FAST to monitor FAST Finance viewing access and AP approval queue. Stay tuned!