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
Deprovision

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.
Deprovision

What needs to be reviewed?
• Financial Manager (account holder)
• FAST Finance viewing access
• Workflow AP Approval queue
Deprovision

- Financial Manager (account holder)
- Is a user the financial manager for any accounts?
Deprovisioning can only occur when a user is not a Financial Manager.
Deprovision

Financial Manager (Account Holder)

Change Financial Manager

- If the Financial Manager needs to be changed, fill out the online “Financial system access form” 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 finadmin@uvic.ca to have the account(s) closed.

Research accounts – contact Research Accounting
Deprovision

Financial Manager (Account Holder)

**Operating Accounts**

- For 10000 operating accounts, don’t forget to check the balance under 11310 Budgetary Saving – Carry Over Funds
### Finance Reporting

**Chart(s):** University Of Victoria

**Index:**

**Fund:** 28282

**Orgn:**

**Acct:**

**Prog:**

**Actv:**

**Locn:**

**Fund.Fin.Mgr:**

**Orgn.Fin.Mgr:**

**Fund Type:**

**Acct Type:**

**Fiscal Period:** Feb-2015 (Open)

**Report:** Operating Statement

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### Summary by Hierarchy

**Current Year**

**Period:** Feb-2015 (Open)

**By:** Fund

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Deprovision

Financial Manager (Account Holder)

Specific purpose accounts
- check “Budget Balance”.

![Financial Reporting screenshot](image)
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