

## iFS Finance system user set up request form

**This form is for non-school based staff**

**ALL FIELDS ARE MANDATORY; INCOMPLETE FORMS CANNOT BE PROCESSED**

Please complete the following information.

### What is your role on the system?

This information will help us to understand which responsibilities you will need. (Enter ✓ if required).

Core finance user working in Finance	
Financial support within a non-finance unit	
Requisitioning on behalf of a budget holder	
Budget holder	

### Information about you

This information will enable us to set you up in the correct position in the organisational hierarchy on the system

Name <i>(please provide full name, including any name that you are known by)</i>	
Staff number <i>(from your payslip)</i>	
Section where you work	
Directorate <i>e.g. Education, Operations &amp; Estates</i>	
Base location	
Job	
Your line manager's full name *	
Your line manager's staff number	
Phone number	
Does your position have supervisory / line management responsibility? <i>Yes or No</i>	

\*Please note that if your line manager has not been set up on the system this could delay setting up your user account. It is advisable for them to request a user account.

### Additional information for requisitioners only

This information will enable us to set the correct defaults for your requisitions.

Note this will be used as your default coding but can be amended for specific requisitions

Person responsible for approving the requisitions you raise <i>If there are multiple approvers please input the person who approves the majority of your requisitions</i>	
What is your default cost centre	

### Additional information for budget holders only

If you require an approval level on the system please ensure senior management in your directorate have approved it in writing to iFS (including the specific amount). Senior management includes Chief Executive, Director, Assistant Director or Chief Finance Officer/Business Partner.

The following information is required to provide access to budget holder reports.

Area(s) that you are responsible for - this could be a section across EA, a section within a local office or an earmarked initiative. <i>List cost centres and function codes required</i>	
Person that you report to in relation to these responsibilities	
Any other user that you wish to have access to your reports – please provide their full name and user name (i.e. 8 digit logon)	

### What to do when you have completed the above information

Please forward this form to your line manager for approval. Your line manager should then forward the form to [ifs.queries@eani.org.uk](mailto:ifs.queries@eani.org.uk) The e-mail should state:

**I authorise [insert name] to be set up on the iFS system in accordance with the information in the attached form.**

Please note

- the organisational structure is currently quite fluid and we may need to carry out some additional checks before we can action your request
- user names and passwords will be provided to the individual named on this form

**For iFS use only**

<i>Enter date &amp; initials</i>	Human Resources	Procurement	System Administration
Received			
Queries raised			
Completed			