

# ORBIT – Project Reporting Module System Access Request Form



Complete this form and have it authorised by your Faculty/Divisional Finance Manager.

Send to: ORBIT System Administrations Group (CRS Team, Level 14, Wyatt House 115 Grenfell St)

Name:		Person ID:
Faculty/School/Area:		Position/Local Title:
Phone Number:	Email:	

Type of request:  New Access       Amend Access       Remove Access

Are you replacing / backfilling an existing user's role in your Department?      YES / NO  
If YES, please provide the user's name:

Access Level Sought	Nominate below the project(s) or cost centre(s) for which this access is required.
---------------------	------------------------------------------------------------------------------------

<input type="checkbox"/> Standard Access	Project(s) or Cost Centre(s):
------------------------------------------	-------------------------------

<input type="checkbox"/> HR Access	Project(s) or Cost Centre(s):
------------------------------------	-------------------------------

<input type="checkbox"/> Manage General Details	Project(s) or Cost Centre(s):
-------------------------------------------------	-------------------------------

<input type="checkbox"/> Manage Projections	Project(s) or Cost Centre(s):
---------------------------------------------	-------------------------------

<input type="checkbox"/> Manage Expenditure Limits	Project(s) or Cost Centre(s):
----------------------------------------------------	-------------------------------

<input type="checkbox"/> System Administration	<i>This role gives the user ORBIT system administration rights.</i>
------------------------------------------------	---------------------------------------------------------------------

### Access & Usage Agreement

I acknowledge that by gaining access to the University ORBIT System I will have access to information confidential to the University in relation to its past and present staff, students and affiliates, and its financial activities. I understand that I must not disclose or make use of that confidential information obtained by me at any time, including after access is discontinued, except in the proper course of my duties. In particular, I undertake not to use any confidential information gained by virtue of my access with the intent of securing a benefit for myself, any other person, company or future employer. I further undertake not to use any information confidential to the University in any way without the consent of the University.

I also acknowledge that the *Project Reporting Module* is an internal management tool to be used to assist with the day-to-day operational management of projects within my jurisdiction. I undertake not to use the information contained within this system for any external reporting purposes and further acknowledge that PeopleSoft Financials is the University's Financial Management System and that it retains the University Council approved budgets.

I accept that any breach will lead to disciplinary action being taken against me. I understand and accept that disciplinary action can include dismissal from my employment.

I agree to advise the appropriate Systems Administrator/s of any changes in my role which may affect my approved access to this system (e.g. change of faculty, division, school, branch, discipline, department, duties/roles, leaving the University or going on extended leave).

<b>User Agreement:</b>	<b>Name:</b>	<b>Date:</b>
	<b>Signature:</b>	

<b>Area Approval (optional):</b>	<b>Name:</b>	<b>Date:</b>
	<b>Signature:</b>	

<b>Faculty Finance Manager Approval (or Divisional Manager, as applicable)</b>		
<b>Name:</b>	<b>Position:</b>	
<b>Signature:</b>	<b>Date:</b>	

### OFFICE USE ONLY

<b>Processed by:</b>	<b>Date:</b>
----------------------	--------------

## ORBIT Project Reporting Module - Report Access Level Definitions

Report / Functionality	Standard Access	HR Access	Manage Projections	Manage Expenditure Limits	Manage General Details
<b>Finance</b>					
Net Available Balance	Yes	-	-	-	-
Monthly Actuals by General Ledger Account	Yes	-	-	-	-
Transaction Details	Yes	-	-	-	-
<b>Salary</b>					
Job Data	-	Yes	-	-	-
Payroll Actuals	-	Yes	-	-	-
<b>Projections</b>					
Projection Details (Income, Operating & Summary Salary & Stipend)	Yes	-	-	-	-
Projection Details (Income, Operating & Detailed Salary & Stipend)	-	Yes	-	-	-
Projection Details Data Entry (Excl. Stipend & Salary)	-	-	Yes	-	-
Projection Details Data Entry (Incl. Stipend & Salary)	-	Yes <small>(Only if have Manage Expenditure Limits access also)</small>	Yes <small>(Only if have HR access also)</small>	-	-
<b>Expenditure Limits</b>					
Expenditure Limits Variance	Yes	-	-	-	-
Expenditure Limits Data Entry	-	-	-	Yes	-
<b>General Details</b>					
ResearchMaster General Details	Yes	-	-	-	-
ORBIT General Details	Yes	-	-	-	-
ORBIT General Details Data Entry	-	-	-	-	Yes
<b>Full Life Estimate</b>					
Full Life Estimate	Yes	-	-	-	-
<b>Comments and Documents</b>					
Comments Entry	Yes	-	-	-	-
Document Upload	Yes	-	-	-	-
<b>Access</b>					
Access	Yes	-	-	-	-

## Completing the ORBIT Project Reporting Module Access Request Form

This document outlines important considerations when completing and/or authorising the access request form for the *ORBIT Project Reporting Module*. In order to avoid delays in gaining access to this ORBIT module, please ensure your form is **accurately** and **fully** completed.

**Note:** Incomplete forms will be returned to the authorising Faculty / Divisional Finance Manager for amendment / completion.

### Completing the Form

---

#### Standard Access

Only tick this if you need to view projects that you **have not** already automatically been granted access to view. You do not need to select this option if you are currently a:

1. Finance *nVision* reporting user as you will automatically obtain *Standard Access* to view all projects you can view through *nVision*.
2. Researcher listed on a grant held at the Research Branch, as you will automatically obtain *Standard Access* to view the associated finance projects for these grants.

#### HR Access

Ticking this option will enable you to view sensitive project related HR job and salary payment data by individual employee. Please consider carefully whether you need this level of information for an individual project(s) or entire cost centre(s).

#### Manage General Details

Ticking this option will enable you to enter project participants, funding data and project milestones into the ORBIT General Details screen.

#### Manage Projections

Ticking this option will enable you to enter Income, Salary, Stipend, and Operating Expenditure data into the Projections screen.

#### Manage Expenditure Limits

Ticking this option will enable you to enter project spending limits into the Expenditure Limits screen.

#### Important!

Please ensure that for **EVERY** option you tick you detail either the:  
- Individual project / cost centre combination(s); or  
- Cost centre(s);

The access is to apply to in the space provided below each access option.

**Note:** If you selected, *Manage General Details*, *Manage Projections*, or *Manage Expenditure Limits* you must attend an ITS training session in the use of these functionalities, before access will be granted. The *ORBIT Systems Administration Group* will contact you to arrange a training session.

### Divisional / Faculty Finance Manager – Authorisation

---

When authorising the *Access Request Form* please ensure the following items have been completed prior to forwarding to the ORBIT Systems Administrations Group:

- For **every** option that has been ticked, the Project(s) and / or Cost Centre(s) the functionality is to apply to have been entered.
- If *HR Access* has been selected, confirm you are happy for the applicant to be able to view sensitive job and salary information for the Project(s) and / or Cost Centre(s) requested.
- If *Manage General Details*, *Manage Projections*, or *Manage Expenditure Limits* has been selected, confirm this access is consistent with the way in which you have decided to manage the input of this information at an individual employee level in your Faculty/Division.