

## Getting Setup in Invoices and obtaining Financial Delegation

Access is given to users to be able to login and use the Invoices system. To obtain this access, users must lodge an online onehelp ticket and obtain approval.

Financial delegation must be obtained if a user is to have authority to approve invoices to a given value and within a range of accounts. To obtain financial delegation a user must lodge an online onehelp ticket and obtain approval from both the department head and deputy CFO. Further information on financial delegation can be obtained from the OFS website: [http://www.ofs.mq.edu.au/financial\\_delegations/](http://www.ofs.mq.edu.au/financial_delegations/)

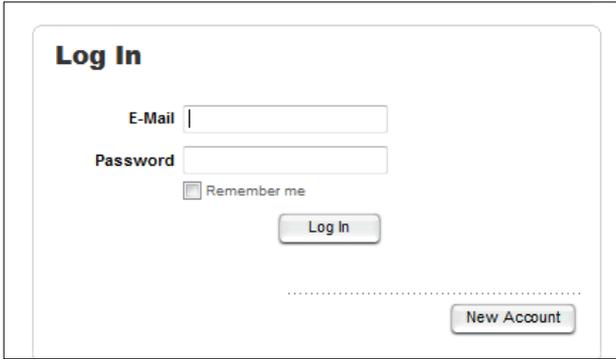
### Summary:

- 1) User to raise a onehelp ticket to obtain and approval Invoices access
- 2) User to raise a onehelp ticket to obtain and approve Financial Delegation (if required)
- 3) Attend Invoices training

An email notification is sent to the user when access and delegation has been setup.

## 1. Onehelp ticket for Invoices access

Login to onehelp <http://mq.edu.au/onehelp/> using email address and password (citrix).



**Log In**

E-Mail

Password

Remember me

*Log-in using onehelp*

**OneHelp Request**

Request Type

Subject

Request Detail

Carbon Copy (Cc:)   Enabled

Location OFS - Systems

Onehelp request form

Select the following from the dropdown boxes to locate the Invoices access form.

**OneHelp Request**

Request Type

This Request Type requires approval.

Subject

Instructions  
 This request is to be logged by the applicant and is subject to approval by Head of Office or Delegate.  
 Submitting this request means that you understand and abide by the Macquarie University [Acceptable Use Policy](#).  
 For more information, visit the [INVOICES Product Page](#).

Invoices 'get access' form in Onehelp

Instructions  
 This request is to be logged by the applicant and is subject to approval by Head of Office or Delegate.  
 Submitting this request means that you understand and abide by the Macquarie University [Acceptable Use Policy](#).  
 For more information, visit the [INVOICES Product Page](#).

New/Existing User\*  New User  Add to Existing Access  Delete Existing Access

Appointment Type\*  MQ Staff (Permanent/Fixed)  MQ Staff (Casual)  Contractors

(Contractors only) Employed by...

Start Date\* 01/01/2014

End Date 01/01/2015

Date Required\* 01/01/2014

OneID\* MQ20130999

Staff Email Address\* colum.hickey@mq.edu.au

Department/Discipline Name\* Office of Financial Services

Department/Discipline Section Code\* 8050

Systems Access and Training Detailed Requirements

INVOICES account requirements\*

Full name of Escalation Officer for INVOICES\* John Smith

Escalation Officer's OneID\*

Systems access requirements  End user to INVOICES  Reporting

Systems training requirements  I require training on INVOICES

Carbon Copy (Cc:)   Enabled

Attachments

Location OFS - Systems

Completed 'get access' Invoices form in onehelp

- Department/Discipline name: this is the department (sits under the faculty) or discipline (sits under the department) for which access is required. *E.g. Sociology*
- Invoices account requirements: this is the level of access the user is to have within the invoices system. This is at either a department/discipline or major account level. *E.g. Access required for Environmental Law 2201*
- Name of Escalation office: This will be the user to who the invoices will be escalated to if not actioned.
- Escalation Officers One ID: This is the escalation officers Macquarie University ID

Once completed and saved an email copy is sent to the user and the approver.

The approver must log-in to onehelp and approve before access can be granted for Invoices.

## 2. Onehelp ticket for financial delegation

Login to onehelp <http://mq.edu.au/onehelp/> using email address and password (citrix).

The screenshot shows a web form titled "Log In". It contains the following elements:
 

- A label "E-Mail" followed by a text input field.
- A label "Password" followed by a text input field.
- A checkbox labeled "Remember me".
- A button labeled "Log In".
- A button labeled "New Account" located below a horizontal dotted line.

*Log-in using onehelp*

The screenshot shows a web form titled "OneHelp Request". It contains the following elements:
 

- A dropdown menu labeled "Request Type".
- A text input field labeled "Subject".
- A large text area labeled "Request Detail".
- A checkbox labeled "Carbon Copy (Cc)" with the word "Enabled" next to it.
- A label "Location" with the value "OFS - Systems" displayed below it.

*Onehelp request form*

Select the following from the dropdown boxes to locate the Financial Delegation Authority access form.

The screenshot shows the 'OneHelp Request' form. The 'Request Type' dropdown menu is highlighted with a red box and contains the following selections: 'Administration and Purchasing', 'Finance', 'Financial Delegation', and 'Authority form'. Below the dropdown menu, there is a blue notification box that says 'This Request Type requires approval.' and a 'Subject' field with the text 'Financial Delegation Colum Hickey'. A green instruction box below the subject field states: 'This authority will replace any previous authorities'.

*Financial Delegation Authority form in Onehelp*

Complete the required fields and select save.

The screenshot shows the 'OneHelp Request' form with the 'Request Type' dropdown menu set to 'Administration and Purchasing', 'Finance', 'Financial Delegation', and 'Authority form'. The 'Subject' field contains 'Financial Delegation Colum Hickey'. The 'Instructions' box states: 'This authority will replace any previous authorities. This request is to be logged by the applicant and is subject to approval by the Head of Office or Delegate. Before completing this form for a delegation, you should fully understand your responsibilities under this Financial Delegation - <http://www.mq.edu.au/policy/800a-delegationpolicy.html>'. The 'New/Existing User' section has 'New User' selected. The 'Financial Delegation Policy' checkbox is checked. The 'Are you employed by Macquarie University?' checkbox is checked. The 'Appointment Type' section has 'MQ Staff (Permanent/Fixed)' selected. The 'Start Date' is 01/01/14, 'End Date' is 01/01/15, 'OneID' is HQ20130999, 'Date Required' is 01/01/14, and 'OneID' is HQ20130999. The 'Staff Email Address' is colum.hickey@mq.edu.au, 'Job Title / Position' is Systems Business Analyst, 'Department/Discipline Name' is Office of Financial Services, 'Department/Discipline Section Code' is 8050, and 'Name of immediate supervisor' is John Smith.

The screenshot shows the 'OneHelp Request' form with the 'Financial delegation effective from' field set to 01/01/2014, 'Temporary financial delegation from' field set to 01/01/2015, and 'Temporary financial delegation to' field empty. The 'Select one or more types of accounts' section has 'University (All Accounts)', 'Faculty', 'Department', 'Discipline', 'Major Account', 'Project/Subgroup', and 'Account Number (Operations and Projects)' selected. The 'Range of accounts (Click Y on the right for guidelines)' field contains 80500001 to 80500005. The 'Supplier invoice approver' is \$10,000 Schedule4 (Administrative C), 'Purchase requisitions approver Finance One' is \$10,000 Schedule4 (Administrative C), and 'Credit card only delegation' is \$500. The 'Systems Access and Training Detailed Requirements' field contains 'Requires invoices access and training'. The 'INVOICES account requirements' field contains 'Require access to major account 80500001 to 80500005'. The 'Full name of Escalation Officer for INVOICES' is John Smith. The 'Systems access requirements' checkbox is checked, 'Reporting' checkbox is unchecked, 'Systems training requirements' checkbox is checked, and 'Require training on INVOICES' checkbox is checked. The 'Additional information' field is empty. The 'Carbon Copy (Cc)' checkbox is unchecked, 'Attachments' field is empty, and 'Location' is OFS - Systems. The 'Cancel' and 'Save' buttons are visible at the bottom right.

*Complete financial delegation authority form in Onehelp*

- Temporary Delegation: This is used when the delegation is only required for a selected period, usually to cover another user when they are on leave.
- Types of Account: Users will require different levels of delegation based on the account or department they are looking after. A faculty head may require delegation for the whole faculty *E.g. 2000 faculty of arts*, whereas an administrator may only require delegation for a single major account *E.g. 22410001 Sociology*.
- Range of Accounts: These are the specific account numbers for which the delegation is required. *E.g. Delegation required for the department of ancient history 2030*
- Supplier Invoice Approver: This is the amount of delegation required for use within the Invoices system. *E.g. \$10,000*

For more details on the type and range of accounts required please contact the head of finance for your area.

Once completed and saved an email copy is sent to the user and the approver. The approver must log-in to onehelp and approve the financial delegation. Deputy CFO sign-off is the second stage of approval which is required.

Once delegation has been setup the user will be notified by email.

### 3. Attend Training

Training is conducted by the office of financial services every fortnight. Users can contact the office of financial services systems team to arrange, or wait to be contacted, once approval for access has been given on the onehelp ticket.

Training summary:

- Overview of the Invoices system
- How to log into Invoices
- Invoices screen layout
- Review/Approve/Forward and other actions
- Purchase order and non-order invoices (with examples)
- Invoice examples (three examples per trainee)
- Financial Delegations
- Archive and Backups
- Attachments and Invoice history
- PO and GST variances
- Questions

Further training materials area available on the office of financial services website: <http://www.ofs.mq.edu.au/intranet/index.htm>

#### Contact us

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CRICOS Provider Number 00002j