

## Financial Systems Reporting Tools Access

This *How To* document gives an overview of the process which allows users to request access to the Budget and Forecasting Tool (BFT), XL Connect and the XL Connect Month End Dashboard.

XL Connect is designed to enable users to run reports from within Excel, without having to log into Oracle Financials separately. XL Connect and the Month End Dashboard will only give access to reports you are authorised to access in Oracle. For a full list of access required for the Month End Dashboard please see the access guidance notes on the FSSC website at [www1.admin.ox.ac.uk/finance/support/forms\\_tools/forms/](http://www1.admin.ox.ac.uk/finance/support/forms_tools/forms/)

The Budgeting and Forecasting Tool aims to free up more days to review and reduce the time spent across the University, supporting the mechanics of the budgeting and forecasting process.

Access to these tools requires the user to have appropriate Oracle R12 access.

### 1. Requestor Details

1. This first page asks if you are making the request for yourself or on behalf of someone else.
2. For the purposes of these guidance notes, we will assume that you are making this request for someone else.

**Service Offering: Financial Systems Reporting Tools Access**  
Request access to Budgeting and Forecasting Tool (BFT) or XL Connect and the XL Connect Month End Dashboard.

**1. Requestor Details**

\* = required

Request access to the financial reporting tools, Budgeting and Forecasting Tool (BFT) and Oracle R12 EIS reporting Excel Add-ons, XL Connect and the XL Connect Month End Dashboard.

XL Connect is designed to enable users to run reports from within Excel, without having to log into Oracle Financials separately. XL Connect and the Month End Dashboard will only give access to reports you are authorised to access in Oracle. For a full list of access required for the Month End Dashboard please see the access guidance notes on the FSSC website at [www1.admin.ox.ac.uk/finance/support/forms\\_tools/forms/](http://www1.admin.ox.ac.uk/finance/support/forms_tools/forms/)

The Budgeting and Forecasting Tool aims to free up more days to review and reduce the time spent across the University, supporting the mechanics of the budgeting and forecasting process.

Access to these tools requires the user to have appropriate live Oracle R12 access.

**Requestor Details**

\* Name: Marek Drzymalski (trop0252)  
\* Email: marek.drzymalski@tss.ox.ac.uk

Are you making this request for yourself or on behalf of someone else?  
\* Requesting for: Someone else


Please enter the person's name.

\* Name:  
\* Email:

3. Enter the person's name in the Name field. If you start typing their name the field will auto-populate for you. Their email address will also automatically populate in the Email

## HOW TO...

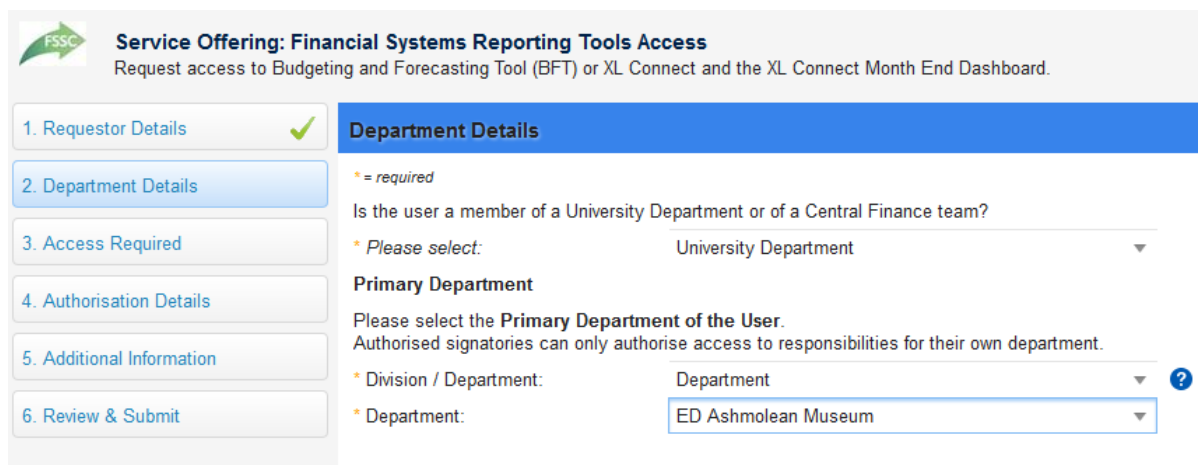
field. Any emails relating to this request, for the users information, will be sent to this email address.

 **Note:** For the individual's name to appear in the field, they must have their record in HEAT.

4. Click 'Continue' in the bottom right of the window.

## 2. Department Details

5. On this page, choose whether the user is a member of a University Department or Central Finance, then choose whether the Primary Department is a Division, Sub-Division or Department, followed by the name of the Division, Sub-Division or Department itself.
6. For the purposes of these guidance notes, we will set up user access for a user within a Department.
7. Choose your Department from the drop down menu. If you know the department code, you can start typing it for the field to autocomplete the Department name.



**Service Offering: Financial Systems Reporting Tools Access**  
Request access to Budgeting and Forecasting Tool (BFT) or XL Connect and the XL Connect Month End Dashboard.

1. Requestor Details ✔

2. Department Details

3. Access Required

4. Authorisation Details

5. Additional Information

6. Review & Submit

**Department Details**

*\* = required*

Is the user a member of a University Department or of a Central Finance team?  
*\* Please select:* University Department

**Primary Department**  
Please select the **Primary Department of the User**.  
Authorised signatories can only authorise access to responsibilities for their own department.

*\* Division / Department:* Department

*\* Department:* ED Ashmolean Museum

8. Once you are satisfied with the details, click 'Continue' in the bottom right of the window.

## 3. Access Required

1. On this page, you are asked which Reporting Tools access, XL Connect and/or Budget and Forecasting Tool (BFT) are required, for the user.

## HOW TO...



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1. Requestor Details ✓

2. Department Details ✓

3. Access Required

4. Authorisation Details

5. Additional Information

6. Review & Submit

**Access Required**

Access is required to which reporting tools?

XL Connect:


Budgeting and Forecasting (BFT):

2. For the purposes of these guidance notes, we will request that the Reporting Tools access is set up with both XL Connect and BFT Reporting Tools Access.


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### XL Connect

1. If you tick the XL Connect box you will be asked what type of access is required. Your options are:
  - XL Connect only
  - Month End Dashboard only
  - XL Connect and Month End Dashboard
2. When choosing one of these options, an explanatory note is shown regarding the type of training that will be required before access to XL Connect and/or Month End Dashboard can be granted.
3. In all cases, you will be asked to confirm if the user has completed the online training for XL Connect.

 **Note:** if the user has not completed the XL Connect and/or Month End Dashboard training, or you are unsure as to whether or not they have completed the XL Connect training, please choose 'Yes' on the drop down menu, as the Training Team will be able to check and confirm this information for the user and if necessary, help in organising the appropriate training.

## HOW TO...

**Service Offering: Financial Systems Reporting Tools Access**  
Request access to Budgeting and Forecasting Tool (BFT) or XL Connect and the XL Connect Month End Dashboard.

- 1. Requestor Details ✓
- 2. Department Details ✓
- 3. Access Required
- 4. Authorisation Details
- 5. Additional Information
- 6. Review & Submit

### Access Required

*\* = required*

Access is required to which reporting tools?

**XL Connect:**

Type of Access: XL Connect and Month End Dashboard ?

Online training is mandatory for both XL Connect and the Month End Dashboard. XL Connect training must be completed before submitting a request for access. Month End Dashboard training will be sent to you once your access has been approved.  
Details of the online training for XL Connect are available on CoSy at [www1.admin.ox.ac.uk/finance/support/training/](http://www1.admin.ox.ac.uk/finance/support/training/).


Please confirm if the user has completed the online training for XL Connect.

\* XL Connect Training Completed?: Yes

**Budgeting and Forecasting (BFT):**

## BFT

1. If you tick the BFT box, an explanatory note appears stating that “Users’ authorisation is defined by Cost Centre / Department / Division” and “Please specify the Cost Centre required at the highest relevant level on Oracle R12. For example the UAS & GLaM Divisional Financial controller would be allocated access at level 03, rather than specifying 061,081 and 092 separately.”

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Request access to Budgeting and Forecasting Tool (BFT) or XL Connect and the XL Connect Month End Dashboard.

- 1. Requestor Details ✓
- 2. Department Details ✓
- 3. Access Required
- 4. Authorisation Details
- 5. Additional Information
- 6. Review & Submit

### Access Required

*\* = required*

Access is required to which reporting tools?

**XL Connect:**

Type of Access: XL Connect and Month End Dashboard ?

Online training is mandatory for both XL Connect and the Month End Dashboard. XL Connect training must be completed before submitting a request for access. Month End Dashboard training will be sent to you once your access has been approved.  
Details of the online training for XL Connect are available on CoSy at [www1.admin.ox.ac.uk/finance/support/training/](http://www1.admin.ox.ac.uk/finance/support/training/).

Please confirm if the user has completed the online training for XL Connect.

\* XL Connect Training Completed?: Yes

**Budgeting and Forecasting (BFT):**

Users’ authorisation is defined by Cost Centre / Department / Division.

Please specify the Cost Centre required at the highest relevant level on Oracle R12.  
For example the UAS & GLaM Divisional Financial controller would be allocated access at level 03, rather than specifying 061,081 and 092 separately.

Top Level Cost Centre Access   
\* Required:

## 4. Authorisation Details

## HOW TO...

1. This page lists the Departmental Authorisers for your Financial System Reporting Tools Access request.

**FSSC** **Service Offering: Financial Systems Reporting Tools Access**  
Request access to Budgeting and Forecasting Tool (BFT) or XL Connect and the XL Connect Month End Dashboard.

1. Requestor Details ✓  
2. Department Details ✓  
3. Access Required ✓  
4. Authorisation Details  
5. Additional Information  
6. Review & Submit

**Authorisation Details**

\* = required

Please note that a request for authorisation will be sent to the **Authorised Signatory** for your department.  
Please select the relevant person from the list.

\* Authorised Signatory:

- Andrew Noton (ashm0268)
- Kevin Rodd (admn1494)
- Marek Drzymalski (trop0252)

\* Email Address: marek.drzymalski@tss.ox.ac.uk

2. Select the appropriate person (only one selection is permitted) and click 'Continue' in the bottom right of the window.

## 5. Additional Details

1. On this page, please add any other relevant details in support of your Reporting Tools Access request.

**FSSC** **Service Offering: Financial Systems Reporting Tools Access**  
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1. Requestor Details ✓  
2. Department Details ✓  
3. Access Required ✓  
4. Authorisation Details ✓  
5. Additional Information  
6. Review & Submit

**Additional Information**

Is there any other information you wish to provide?

Additional Information:

2. Click 'Continue' in the bottom right of the window to continue.

## 6. Review & Submit

1. This page allows you to check the details and options which you have selected across all the preceding sections.
2. If you are satisfied with all the information, click 'Submit' in the bottom right of the window to continue. Otherwise, click on any of the section headings on the left hand side to go to the relevant page to make an amendment.
3. Once you have submitted the Service Request you will again see a summary of the details and options which you requested.
4. Crucially, on the left hand side, you will see the request number; the general details of the Service Request; the estimated delivery time and an option to cancel the request.
5. A confirming email will also be sent to you containing the Service Request number and basic details.
6. Once approved by the Authorised Signatory, the request will be received and actioned by the FSM team and the user will receive an email confirming this.

### **Checking on the status of your Financial System Reporting Tools Access request**

It is possible to see the progress of your Financial Systems Reporting Tools Access request, via <https://oxford.saasiteu.com/>

The user can log into HEAT using their SSO and click on My Items, towards the top left of the page and they should see something like this:

| ID       | Summary                                  | Type            | Status    | Due Date         | Progress  | Created On       | Modified On      |
|----------|--|-----------------|-----------|------------------|---|------------------|------------------|
| 30029859 | Financial Systems Reporting Tools Access | Service Request | Submitted | 18/11/2018 12:00 | <div style="width: 100%; height: 10px; background-color: green;"></div> | 13/11/2018 12:00 | 13/11/2018 12:00 |

You will also receive an automated email confirming that your Departmental Authoriser has received your request. Once approved, the request is automatically sent to the FSM Team who will action it and once the set up has been completed you will receive a confirmation email with the next steps required.