Administrative guide to UCalgary systems

This guide outlines administrative tasks associated with research in the Department of Pediatrics. How-to guides and links to setup access are found in the table below.

The physician(s) you support and the Manager(s) of Administrative Services determine the level of access and systems you require to support research activities. Below are examples of access levels to aid in decision making.

*The first step is for AHS administrative support staff to request access to UCalgary systems by becoming a general associate. * Please email either Karly Pauls or Wanda Parr to submit a request. This is normally completed during on-boarding.

Levels of access for administrative support staff

**Level 1** – Basic access provided to a general associate
*Identifies AHS administrative staff as UCalgary affiliates but does not provide the ability to conduct tasks within UCalgary systems. Administrative staff should have at least this level of access. With this level of access, you can:

- Create a UCalgary IT account
- Use the My UofC portal
- Get a UCalgary email address
- View how-to guides and training on how to use systems

**Level 2** – Access to facilitate grant applications and expenses management
*This level of access will be suitable in most cases and will allow administrative staff to provide support for essential research-related tasks. With this level of access, you can:

- Access the Research Management System (RMS) to support grant applications
- Help with research project account setup
- Submit expense claims on a physician’s behalf
- Submit invoices to project accounts
- Monitor (read only) project finances using eFin
- Support hiring processes

**Level 3** – Perform tasks on physician’s behalf in UCalgary systems
*This level of access can be enabled to include financial and HR related approvals and should only be used on a temporary basis if the physician is unable to conduct their own approvals. With this level of access, you can:

- Become a project account delegate for financial approvals
- Become a project account delegate for HR approvals (e.g., timesheets)

*Updated: September 23, 2021*
<table>
<thead>
<tr>
<th>Area</th>
<th>System/Task</th>
<th>Description</th>
<th>What to do</th>
<th>Guides</th>
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</thead>
<tbody>
<tr>
<td>IT</td>
<td>An IT account is needed to access the My UCalgary portal. Admin staff will need this for many of the tasks below.</td>
<td></td>
<td>Register for an IT account</td>
<td>Requires UCID* <em>(Provided to general associates)</em></td>
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<tr>
<td>PeopleSoft</td>
<td>PeopleSoft is the web-based system used for finance, HR and supply chain management.</td>
<td></td>
<td>Request access (requires IT access)</td>
<td>Guide</td>
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<tr>
<td>Accounting/Finance</td>
<td>Project account setup</td>
<td>Create a new account for a grant or other funding</td>
<td>Project request form</td>
<td>Guide</td>
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<tr>
<td>Accounting/Finance</td>
<td>eFin</td>
<td>eFin is used to monitor project finances.</td>
<td>Project budget owner provides access via project delegation.</td>
<td>Guide</td>
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<tr>
<td>Accounting/Finance</td>
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<td>Request an extension for a project account or note significant changes to project funding</td>
<td>Project update request form</td>
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<tr>
<td>Accounting/Finance</td>
<td>Expense claim</td>
<td>Reimburse costs incurred out of pocket to a project account</td>
<td>Expenses are submitted in UCalgary portal</td>
<td>Guide</td>
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<tr>
<td>Accounting/Finance</td>
<td>Subject fees</td>
<td>Pay research participants for their involvement in a project</td>
<td>Subject fee advance request form</td>
<td>Guide</td>
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<tr>
<td>Accounting/Finance</td>
<td>Financial approvals</td>
<td>Approve finance transactions (e.g. expense approval) on behalf of the project account holder</td>
<td>Project owner (physician) provides approval in UCalgary portal</td>
<td>Guide</td>
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<tr>
<td>Human Resources</td>
<td>ACH Onboarding</td>
<td>Researchers must complete ACH and UCalgary onboarding</td>
<td>See checklists on Department website</td>
<td></td>
</tr>
<tr>
<td>Human Resources</td>
<td>Hiring guide</td>
<td>This tool helps researchers with the process of hiring salaried research staff (e.g., research assistant, research coordinator) at ACH</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Human Resources</td>
<td>Template based hire for casual employees</td>
<td>Hire a temporary employee without the formal HR recruiting process (e.g., casual hire).</td>
<td>Complete form in UCalgary portal</td>
<td>Guide</td>
</tr>
<tr>
<td>Human Resources</td>
<td>Job opening request</td>
<td>Initiate process to hire a regular (FT/PT staff)</td>
<td>Complete form in UCalgary portal</td>
<td>Guide</td>
</tr>
<tr>
<td>Human Resources</td>
<td>Timesheets (for hourly employees)</td>
<td>Timesheets are submitted in UCalgary portal</td>
<td></td>
<td>More information</td>
</tr>
</tbody>
</table>
### Research

- **HR approvals delegate**
  *Should only be used on a temporary basis*

- **Academic Portfolio**
  Physician annual reporting tool
  Complete in [UCalgary portal](https://ucalgary.ca/)

- **Project Activities Checklist**
  Outlines the steps required to start-up a research project.

- **Research Forms Matrix**
  A completion checklist for research related forms for signature to the Department Head.

- **Research Management System (RMS)**
  System to manage grant applications
  [Click here to access](https://ucalgary.ca/)

- **UCalgary PowerPoint and research poster templates**
  Templates with UCalgary branding that can be used for presentations (e.g. academic conference)
  [Click here to access](https://ucalgary.ca/)

### Supply Chain Management (SCM)

- **Payment selector tool**
  Tool guides users how to pay for different types of expenses

- **Purchasing Card (PCard)**
  Purchases supplies, materials and services under $5,000
  Complete in [UCalgary portal](https://ucalgary.ca/)
  [Guide](https://ucalgary.ca/)

- **Travel and Expense Credit Card (T&E card)**
  Pay for hospitality, entertainment and travel expenses
  Complete in [UCalgary portal](https://ucalgary.ca/)
  [Guide](https://ucalgary.ca/)

- **Purchase order (PO) request (ePro)**
  Order goods or services over $5,000 from approved vendors
  Complete in [UCalgary portal](https://ucalgary.ca/)
  [Guide](https://ucalgary.ca/)

- **Add supplier**
  Add a business to the approved vendor list
  [New supplier request form](https://ucalgary.ca/)

- **Submit an invoice**
  Request payment to a vendor
  Complete form in [UCalgary portal](https://ucalgary.ca/)
  [Guide](https://ucalgary.ca/)

### UCalgary library

- **How to access content**
  Academic resources such as journal articles, databases and citation tools.

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**NEED HELP? CONTACT USERVICE:**

**UService is now your one-stop shop for IT, HR, Supply Chain Management, IRISS, RMS and Finance inquiries.**

Visit [ucalgary.ca/uservice](https://ucalgary.ca/uservice), call 403-210-9300 or use one of the following email addresses:

*Updated: September 23, 2021*
- it@ucalgary.ca
- finance@ucalgary.ca
- hr@ucalgary.ca
- RMSHelp@ucalgary.ca
- iriss.support@ucalgary.ca
- onboarding@ucalgary.ca