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)

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CLICK ON THE BLUE HYPERLINKS TO LEARN MORE

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

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	HR approvals delegate *Should only be used on a temporary basis	To approve HR transactions (e.g. timesheet approval) on behalf of the Manager	Manager (e.g., physician) provides approval in UCalgary portal	Guide FAQs
Research	Academic Portfolio	Physician annual reporting tool	Complete in UCalgary portal	Guide
	Project Activities Checklist	Outlines the steps required to start-up a research project.	Click here to access	
	Research Forms Matrix	A completion checklist for research related forms for signature to the Department Head.	Click here to access	
	Research Management System (RMS)	System to manage grant applications	Click here to access	Guide
	UCalgary PowerPoint and research poster templates	Templates with UCalgary branding that can be used for presentations (e.g. academic conference)	Click here to access	
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	Guide
	Travel and Expense Credit Card (T&E card)	Pay for hospitality, entertainment and travel expenses	Complete in UCalgary portal	Guide
	Purchase order (PO) request (ePro)	Order goods or services over $5,000 from approved vendors	Complete in UCalgary portal	Guide Supplier list
	Add supplier	Add a business to the approved vendor list	New supplier request form	
	Submit an invoice	Request payment to a vendor	Complete form in UCalgary portal	Guide
UCalgary library	How to access content	Academic resources such as journal articles, databases and citation tools.		

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

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