What is Finance Services?

Finance Services is a place where you can do requests for:

- Making **expense claims** and attaching supporting documentation
- Reconciling your UNSW **credit card** and attaching supporting documentation
- Submitting a finance related queries using the Finance **General Inquiry** form

You’ll receive an email with a reference number when you submit a request.

**Benefits of Using Finance Services**

- **Tracking of submissions:** When you submit any request, you will receive an email with a trackable reference number.
- **Mobile version:** Upload and manage your receipts via your mobile device, in order to attach to your claims and reconciliations submission.

More services will be coming in the future.
myUNSW

Log into myUNSW and click on the My Finance link at the top of the page

Use the Direct Link

Go to https://financeservice.unsw.edu.au/nav/ (bookmark it in your browser)

Use the Mobile version

Add the mobile version to your mobile device
Log into myUNSW and click on My Finance in the top menu.
More services will be coming in the future

Finance Services is to the left of the My Finance page.

Here you can:

- submit an expense claim (either for yourself or for someone else),
- submit the expenses you have incurred on your university credit card, or
- Submit a General Finance Inquiry

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Go to the Finance Services website
https://financeserve.unsw.edu.au

Bookmark it for future use
Use the Mobile version so that you can claim your expenses and/or send your credit card expenses to your Finance Services Team from anywhere.

You can use the web version or the mobile version depending on where you are.
1. Click on submit an expense claim, confirm your details or click on Complete for someone else and prove their details
2. Provide a contact number
3. Specify your organisation
4. Tell us what this claim is about
5. Provide your approver’s name
6. Add items to your claim (you can have one, or many, items. Keep clicking Add Item until you are ready to submit the claim)
   1. Describe the item you are claiming
   2. Provide a currency
   3. Specify the amount
   4. Select the transaction detail
   5. Provide a reason for the purchase
   6. Answer and FBT question (if you click ‘no’ you will be asked a couple of additional questions
   7. Provide a chartfield (minimal information required are project id and project description)
7. Attach your supporting documentation
8. Submit the claim
1. Click on submit credit card expenses
2. Confirm your details or click on Complete for someone else and prove their details
3. Provide a contact number
4. Specify your organisation
5. Provide your approver’s name
6. Add items to your claim (you can have one, or many, items. Keep clicking Add Item until you are ready to submit the claim)
   1. Describe the item you are claiming
   2. Provide a currency
   3. Specify the amount
   4. Select the transaction detail
   5. Provide a reason for the purchase
   6. Answer and FBT question (if you click ‘no’ you will be asked a couple of additional questions)
   7. Provide a chartfield (minimal information required are project id and project description)
7. Attach your supporting documentation
8. Submit the form
You can add a receipt against every line; or

you can bulk your receipts together and load them all together.

<table>
<thead>
<tr>
<th>Item</th>
<th>Date</th>
<th>Reason</th>
<th>Amount</th>
<th>Charge to</th>
<th>No. of attendees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line 1 Item Description</td>
<td>04/09/2017</td>
<td>Line 1 Reason</td>
<td>AUD 100.00</td>
<td>PS123456 100%</td>
<td></td>
</tr>
<tr>
<td>Line 2 Item Description</td>
<td>04/09/2017</td>
<td>Line 2 Reason</td>
<td>AUD 100.00</td>
<td>PS123456 100%</td>
<td></td>
</tr>
</tbody>
</table>

**Bulk attach receipts**

*Total attachment size: 0MB of 20MB*
Charge an item across multiple projects

There may be times when you have an item that you need to charge across multiple projects (or chartfields).

**Splitting your items charge:**

1. Enter your expense or credit card item and click on add item.
2. The item will display at the bottom of the page.
3. Click on edit in the line you want to charge across multiple projects.
4. Press the Add new line button.
5. Distribute the accounting for the line (by percentage).
6. Press OK when finished.

Please note this is not available on the mobile version.

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Request a new vendor or change an existing vendor

Use this form if you need to have a new supplier set up or if you would like to change the details of a current supplier.

Buy hazardous goods via Jaggaer system (authorised users only)

If you are authorised to purchase hazardous goods use this form to do so. There are two approvals required when buying hazardous goods:

1. When you submit your request in Jaggaer an approval is required on the purchase of hazardous goods
2. When the order goes into NS Financials a financial approval is required on the spend
Request a UNSW tax invoice

Use this form to request a UNSW tax invoice. Many customers require a purchase order number to be provided on the invoice. It is recommended to check with your customer first before starting this request.

You will need to supply:

1. Customer information (there is a link to look up customer information)
2. Purchase order number (if required)
3. Customer contact details
4. Information on the invoice such as a description, your business unit, currency and payment terms
5. Invoice Items (lines) including pricing, chartfields, etc
6. Instructions on invoice delivery
7. Any supporting documentation you’d like to attach
Use this form to request access to **NS Financials, OneStop** and Finance reporting in **Calumo**.

**Important to know:**

All UNSW employees are automatically granted basic access to NS Financials when they commence work at UNSW.

This allows such tasks as approving transactions, reconciling a credit card, receipting a purchase order, requesting an expense reimbursement or making inquiries. If this is you then just log-in to **NS Financials** or use the **NS Financials Self Service Portal** using your zID and password.

If you require **additional** NS Financials access please user this form.
Submitting a General Inquiry:

1. Scroll to the bottom of the page and click on General Inquiry
2. Confirm your details (or enter someone else’s details if you are submitting the inquiry on behalf of someone else)
3. Provide a contact number
4. Say where you are from
5. Tell us what your enquiry is about
6. Provide more details on
7. Attach a document (optional)
8. Submit your request
9. Receive an email with a reference number
10. Receive a response within 3 business days
From here you can log into NS Financials and:

- enter an expense reimbursement for yourself or for someone else;
- reconcile your credit card and submit your supporting documentation;
- Approve a transaction that has been submitted to you for approval.
From here you can:

- Go to the Finance website
- See the Project Financials for your portfolio of projects (for Academics and Professionals)
- View the Financial Reporting for your school, unit or department
Finance Services Teams

Art & Design: FinServ.ArtDesign@unsw.edu.au
Arts & Social Sciences: FinServ.ArtsSocialSciences@unsw.edu.au
Built Environment: FinServ.BuiltEnvironment@unsw.edu.au
Business School: FinServ.BusinessSchool@unsw.edu.au
Divisions: FinServ.Divisions@unsw.edu.au
Engineering: FinServ.Engineering@unsw.edu.au
Law: FinServ.Law@unsw.edu.au
Medicine: FinServ.Medicine@unsw.edu.au
Science: FinServ.Science@unsw.edu.au

We would be very happy to receive your feedback on this book
Contact Finance Guidance at fti@unsw.edu.au