About Finance Services

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
• Request new/change vendor details, make a purchase from the online catalogues, submit request for hazardous goods purchase (authorized people only) and raise a Purchase Order

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

Need Help?

NS Financials Self Service
Resources
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Handling Attachments
Charge an item across multiple projects
Request New/Change Vendor Details
Buy from UNSW’s Online Catalogues
Buy Hazardous Goods via Jaggaer
Request a Purchase Order
Request a UNSW tax invoice
Request Access to Finance Systems
General Inquiry
Travel Allowance & Cash Advances
Need Help?
How to Access Finance Services

Through **myUNSW**
Use the browser and Log into myUNSW - [https://my.unsw.edu.au](https://my.unsw.edu.au) then click on the ‘My Finance’ link at the top of the page

*or*

Through the **Direct Link**
Use the browser and go to [https://financeservice.unsw.edu.au/](https://financeservice.unsw.edu.au/) (bookmark it in your browser for future access)

*or*

Use a **Mobile Device**
Use the browser and go to [https://financeservice.unsw.edu.au/](https://financeservice.unsw.edu.au/) (bookmark it in your mobile browser for future access)

Additional resources re mobile devices:
- [How to add bookmark as icon on your mobile device](#)
- [Attaching Receipts (Mobile)](#)
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,
• Buy from UNSW’s online catalogues,
• Request access to finance systems, or
• Submit a General Finance Inquiry
Through the Direct Link (use a browser)

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

2. Bookmark it for future use

3. Access the commonly used services through Quick Links

4. Click on the icons to access more services.
Use a Mobile Device

1. Go to the Finance Services website [https://financeservice.unsw.edu.au](https://financeservice.unsw.edu.au)
   Or tap on the icon (if prepared) *(How to add bookmark as icon)*

2. Access the commonly used services though Quick Links

3. Scroll down to access more services.

Use the Mobile version to access the Finance Services from anywhere.
Submit UNSW Credit Card Expenses

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

Submit a Credit Card Expense (pdf) Quick Card
Credit Card Expense Video (03:25)

Concur Expense Management System (EMS) will fully replace this process in 2020. Go to myExpenses to learn more about Concur EMS.
Employee Expenses

Submit an Expense Claim

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

• Submit an expense Claim (pdf) Quick Card
• How to Scan Receipts Video (01:28)
• Expense Claim Video (04:02)

Concur Expense Management System (EMS) will fully replace this process in 2020. Go to myExpenses to learn more about Concur EMS.
1. You can add a receipt against every line; or
2. you can bulk your receipts together and load them all together.
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.
Buying

Request New/Change Vendor Details

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.

- Buying information (web)
Use this form to buy from UNSW’s online catalogues. Amongst the things you can buy from these catalogues are:

- Stationery
- Furniture
- Office equipment
- Computers
- Computer accessories
- Lab and workshop supplies
- Printing & publishing

Once you submit the form a Finance Services Team member will complete and submit your order.
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 Purchase Order

Purchase Order can be requested from Financial Services, by filling in:

- Your detail
- Supplier’s detail (need supplier’s ID)
- Purpose of the purchase
- Itemise of the purchase
- Delivery information
- Approval information
- Attachments (invoice or quotes) – please follow the requirements outlined in the website.

**Note:** You cannot split the item into multiple chartfield in this form; if you need to split amongst multiple chartfield, provide the instruction on the comment for FST to carry out the split when they received your request.

- Buying information (web)
- Request a Purchase Order video (04:39)
Customer Invoices (issued by UNSW)

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

• Billing information (web) – Sending invoices
• Glossary of Financial Terms: Charfield (web)
Access to Finance Systems

Request Access to Finance Systems

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 use this form.

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- [Online forms directory](#) (web)
General Inquiry

You can submit a general inquiry to ask us anything Finance related

Can't find what you are looking for? General enquiry

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
Travel Allowance & Cash Advances

Please read and follow the procedure outlined at myTravel@UNSW; submit your travel application and get it approved.

**Travel Allowance (Per Diem)**
(Staff Only)

- Based on the city of travel and the figures provided by myTravel@UNSW, fill in TR2 Form to process your Travel Allowance (per diem). Then get it signed by your faculty/division’s Travel Authoriser.
- When you get notification of your approval from myTravel and receive a signed TR2, please forward them to your faculty/division’s Finance Services Team.
- If you are travelling overseas, you will also need to attach the approved travel plan/pre-trip travel summary which you can download from myTravel@UNSW.
- You can submit the TR2 before or after the trip. The per diem be paid into your bank account.
- If using EMS Concur, submit a Expense Claim and attached both the signed TR2 and pre-trip travel summary as a single pdf file.

**Travel Cash in Advance**
(Staff Only)

- Cash advances for significant travel expenses may be permitted where the traveller does not hold a UNSW credit card or a card cannot be used at the destination. Please read “Travel Advances” information.
- You have to submit the TR3 Form before you travel to get it approved, acquire the fund and travel. Keep receipts of expenses while traveling, and within 30 days upon return submit a settlement and return unused fund.
- If using EMS Concur, submit cash advance, and attached the signed TR3.

myTravel@UNSW (web)
Download TR2 Form (pdf)
Find your Finance Services Team Contact (web)
EMS Concur – How to Submit New Expense Claim (under Expenses)

**Payment Advances** (web)
Download TR3 Form (pdf)
Account Payable (AP) email: aphelp@unsw.edu.au
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.

View the full NS Financials Self Service document

- NSF Financials Self Service Handbook (pdf)
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