A NS Financials Self-Service Portal is available in myUNSW. It is primarily used to perform approvals for transactions in NS Financials, such as:

- Journal Approval
- Student Expense approval

If you are accustomed to using NS Financials please continue to do so, the benefit of using the portal is that it doesn’t require a VPN connection, so if you are travelling or off campus you can use the Portal without a VPN connection.

If you receive an approval request, the link in the notification will bring you to the self-service portal.

(Please note that Expenses and Credit Card transactions are now done in SAP Concur so approvals for those are done no longer in the self-service portal).
Where is the Self Service Portal?

1. Log into myUNSW
2. Click on the My Finance tab
3. Click on My finance portal
Approval Workflow

This is what a typical workflow approval request email looks like.

When you click on Go To Approvals you will be directed to the Self Service Portal in myUNSW.

If you want to use your worklist in NS Financials instead you can ignore this email and go directly there.
Approval Requests

• If you are a financial delegate all request for approval will appear in your Approval Requests list.

• The first column identifies what type of request it is followed by basic details of the request. You can click on the review button to view more details and approve (or deny) the request.

• If your list is long you can use the Unit drop down to filter your approval requests

• You can also filter the requests in your list by their type using the Request Type drop down

• Search for a specific request by number

• Click Review to go into the request to view the details

• Reassign the request to another financial delegate (this this is greyed out it cannot be reassigned)
Go to the Approval Requests Menu

If you have a journal to approve it with say Journal in the Request type column

Click on Review to review the Journal

**Note!** Heavy users can perform their approvals in their NS Financials worklist if they wish. Simply do not click on Go to Approvals in the approval request email but log into NS Financials instead.
1. Journal Details (including any attachments)

2. Approval Status (if this section is collapsed click on the twistie to expand it)

3. Journal Lines (if this section is collapsed click on the twistie to expand it)

4. Click on this icon to combine the tabs (Chartfields, More Chartfields and Currency Details) into one tab

5. Notice how many lines the journal has

6. Click on the download icon to download all the journal lines into Excel

7. The Zoom icon will expand the lines view in order to see more on the screen

8. Action buttons (Approve, Deny and Add Comments)
When you click on Review you will see the details of the claim you are being asked to approve:

1. The **claim number** and person who is making the claim
2. A **summary** of the claim
3. Supporting documentation **attachments**
4. Line **details** (there can be one, or many, lines in a claim)
5. The **accounting distribution** of the claim
6. You need to **confirm** that you are performing the approval according to your responsibilities of your delegation
7. Provide any **comments** (optional)
8. **Approve**, deny or reassign the request
Finance Guidance
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We would be very happy to receive your feedback on this booklet. Please contact us.