Introduction to UFS
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Background to the University Finance System

The University uses a software package called Oracle Financials to maintain its accounts. It has been in use since August 2000.

The system is widely referred to as CUFS (Cambridge University Finance System) or UFS (University Finance System). Throughout this document it will be referred to as UFS.

UFS offers “real time” processing, meaning that you are able to obtain a true picture of a Department’s financial position at any given time. The system records Departmental budgets, money coming in, going out and any commitments to spend.

Different tasks can be performed in different areas of the system and each area is known as a module.

The University has the ‘Live’ system of UFS and also a ‘Play’ version. Play is a copy of the live system and used for training purposes, where delegates can log on for practice without the fear of inputting and amending data on the live system.

Within each Department there will be a UFS Key Contact. The Head of Department will nominate the key contact. Key contacts are responsible for all aspects of UFS user accounts in the live system.
The UFS modules

There are different types of tasks that can be carried out in UFS. These tasks are categorised into various modules. Each module gives you the ability to perform a specific set of tasks.

**iProcurement**
Raising requisitions and purchase orders to suppliers. Receipting goods delivered and services performed.

**Accounts Payable**
Processing suppliers’ invoices and expenses ready for payment.

**Research Grants**
Records detailed information about grants and their financial position.

**Accounts Receivable**
Generation of sales invoices, receipting and banking of monies received. Statement generation and recording debt management activities.

**Inventory**
Receipting and issuing of stock items. Records stock counts and calculates values.

**Fixed Assets**
Recording and tracking of Fixed Assets.

**Cash Management**
Reconciliation of the University bank accounts.

**General Ledger**
Collates and summarises information from all the modules and combines with budget information.

Journals raised for adjustments, transfers and petty cash transactions.
The UFS homepage

After navigating to http://ufs.admin.cam.ac.uk, the page above will display.

**Area 1** contains links through to the both the Live and Play systems. You can also access information on the following:

- The Supplier Search and Request system
- Reference and training material
- Helpdesk contacts
- Key contacts

**Area 2** contains the UFS notice board. The notice board will communicate important information regarding the system, such as any planned “down time” or any current technical problems.

**Area 3** contains links through to:

- UFS bulletin archive
- Financial Procedures
- Finance Staff Bureau
- Month-end timetable
- Technical installation
- Finance Training homepage
- Password problems
The Play system

The Play system provides a safe environment for learning the various aspects of UFS. It allows you to get a feel of how the system works and lets you practice your skills to improve confidence prior to using the live system.

Area 1 You can access the training using the link highlighted above.

Area 2 provides further information on the Play system and details who to contact if access is required. Play users will only have access for a period of time, as the system is refreshed every three months to provide more up to date information from the live system.
Logging into UFS

After selecting either the UFS Live link from the UFS homepage, the following screen will display:

To log in to UFS you will need to enter your user name and password, which will have been provided via your key contact for UFS. If you do not yet have a password for the Live system, speak with your key contact to arrange access.

Please note that Finance Training can only provide you with a password for the Play system.

After logging in for the first time, the system will prompt you to change your password for security reasons. Your password must contain at least six characters and we suggest that you use a mix of letters and numbers for maximum security.

After changing your password you will be directed to the E-Business Suite homepage.
E-Business Suite homepage

Once you have logged in the E-Business Suite Homepage will appear.

The homepage is split into three main sections:
- **Responsibilities**
- **Tasks**
- **Favorites** (note American spelling).

A **responsibility** is having the ability to use a specific area of the system and within each responsibility there are various tasks that can be performed. Your responsibilities on the Live system are designated by your key contact and further information can be found on the UFS homepage. Responsibilities on the Play system are added by Finance Training.

The example in the above image shows the responsibility **CAPSA AG: AP Invoice Manager**. When broken down it means:

**CAPSA** - the name given to the project that set up UFS back in 2000.

**AG** - every department in the University has a unique two-letter code. AG represents the Finance Division. You will see your own code in your responsibilities on the Live system.

**AP** - represents the **Accounts Payable** module, where supplier invoices are processed.

**Invoice Manager** - indicates the level of access within the module.

**Tasks** within a responsibility will appear on the middle of the page when the responsibility name is selected.
Setting up Favorites

Favorites allow you to create a list of most commonly used tasks so that you can access them straight from the list. This will save time as you will not have to select the responsibility first and scroll down until you find the task that you need. The following steps will illustrate how to set up Favorites.

1. Begin by selecting the Personalize button within the Favorites area of the E-Business Suite homepage or “Manage favorites” under the Favorites drop-down menu.

2. Click on the drop down list to **select the relevant responsibility** and click on the Go button as shown below.

3. Tick the boxes adjacent to the tasks that you want to add to your Favorites list and click on the Add button.
The selected tasks will appear at the bottom of the page in the **Selected to Display** section.

4. Click on the **Apply button** to save the changes.

Your Favorites will appear on the right hand side of the E-Business Suite Homepage.
The Navigator

When you select a responsibility from the E-Business Suite Homepage and click on the relevant task, UFS will load and the relevant form will display. When that form is closed, the Navigator is displayed, as shown below:

The navigator displays all of the tasks within the selected responsibility.

Tasks with a + symbol adjacent to them are actually sub-headings. Each sub-heading contains one or more tasks within it and you will need to perform any one of the following to open them:

- Double-click the heading.
- Click on the heading and click the Open button.
- Click on the blue + icon.
- Click on the heading and press the Enter key on your keyboard.

Opening a task follows the same principles as opening a sub-heading; however the most straightforward way is to double-click on the task name.
Setting up a Top Ten List

To add a task to the Top Ten List, (to save you searching for frequently used screens), you highlight the task and click on the forward arrow button.

To remove a task, highlight the relevant line in the Top Ten List and click on the back arrow button.

CARE! Some of the tasks that you select to display in your Top Ten List may change name.

Double click on the task to open the relevant form.

The Top Ten List is similar to Favorites as it contains shortcuts through to tasks that you carry out on a regular basis. The main difference is that with the Top Ten List you must select the responsibility in the navigator for the list to appear. On the E-Business Suite Homepage, Favorites can be from a mix of responsibilities and allow you to bypass the navigator and take you straight into the task.
Personal profiles

- Allow you to change defaults within the system.
- Specific to user and contains information entered by the user who has signed onto the system.
- Examples include changing printer, requisition or purchase order defaults

1. Navigate to **Personal Profile** either from your task list on E Business Suite Home page or from Navigator once you have selected a task. A blank screen will appear.

2. Press **F11** on your keyboard or using the view menu select **Query by Example then Enter** to put the screen into query mode, the first line should go blue.

Setting default GL account codes and contact details to print out on orders

Enter CAPSA% and then press **ctrl + F11** or using the view menu select **Query by Example then Run**, this will display the options where you can default in the following fields:

a. **CAPSA GL...** profile names (five in all) can be changed by clicking in the User Value field for the relevant profile name. Enter your own relevant account code segments. Useful within iProcurement.

b. **CAPSA PO...** profile names relate specifically to Purchase Orders. You can enter your fax and telephone number by clicking in the user value and these will print at the top of your purchase order.
Setting the number of copies to be printed automatically

Press **F11** on your keyboard to put the screen back into query mode and this time type in CONCURRENT% and press **ctrl F11** and you can default in the following.

**Concurrent Report Copies** profile name allows you to change the number of copies set to come off the printer, without having to keep changing it in the request screens.
a) Click into the *User Value* field
b) Enter 1 in the field if you mostly raise purchase orders or sales invoices. If you are running a lot of reports then enter 0 in field so that it prints to screen first for you to view and then you can reprint if required.
c) Save

### Setting your local printer

Press **F11** on your keyboard to put the screen back into query mode and this time type in PRINTER % and press **ctrl F11**.

*Printer* profile name allows you to set your own printer name in the User Value column by clicking in the user value field and use the list of values to select required printer. Not all printers are compatible with UFS so you may need to check with your computer office.

![Personal Profile Values](image)

Save your changes to update your personal profile.
The University Chart of Accounts

The Chart of Accounts detail how expenditure and income is recorded within your department’s accounts in the General Ledger. There is a set structure to allow the University to consolidated and report across all departments.

When you wish to buy or make a sale, you will specify where the expenditure or income is to be allocated within your department’s Chart of Accounts. This could be:

(i) coded to a departmental budget or funds (also known as a “charge account”)
(ii) to a Research Grant/Project
(iii) a combination of the two.

General ledger account codes are made up of six segments:
- Organisation (1 character)
- Department (2 characters)
- Cost Centre (4 characters)
- Source of Funds (4 characters)
- Transaction (4 characters)
- Spare (4 zeros)

They are normally written in a string format e.g. U.AG.AGAA.AAAA.ESBC.0000.

Transactions that relate to Research Grants have their own coding system to record the type of specific information required for reporting to sponsors. However, when the information is transferred into the General Ledger it is automatically summarised and converted into the above standard format.

Below is a summary of the structure and logic behind each segment of the General Ledger code. Chapter 3 of the Financial Procedures Manual provides more detailed information on each segment.

**Organisation Segment**

This is used to split transactions by legal entity. Normally this will be U for departments within the University of Cambridge.

**Department Segment**

This is used to define the Department or institution processing the transaction, eg AG for the Finance Division. The first letter can help to indicate the group to which the Department belongs.
### Department Code Range and Area

<table>
<thead>
<tr>
<th>Department Code Range</th>
<th>Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>University balance sheet</td>
</tr>
<tr>
<td>A-B</td>
<td>Unified Administration Service (UAS)</td>
</tr>
<tr>
<td>D</td>
<td>Non-School Institutions (NSI)</td>
</tr>
<tr>
<td>E</td>
<td>Other</td>
</tr>
<tr>
<td>G</td>
<td>School of Arts &amp; Humanities</td>
</tr>
<tr>
<td>J</td>
<td>School of Humanities &amp; Social Sciences</td>
</tr>
<tr>
<td>K-M</td>
<td>School of the Physical Sciences</td>
</tr>
<tr>
<td>N</td>
<td>School of Technology</td>
</tr>
<tr>
<td>P</td>
<td>School of the Biological Sciences</td>
</tr>
<tr>
<td>R-S</td>
<td>School of Clinical Medicine</td>
</tr>
<tr>
<td>U-X</td>
<td>Various but principally Non-School Institutions (NSI)</td>
</tr>
<tr>
<td>W</td>
<td>Investment accounting (central use only)</td>
</tr>
</tbody>
</table>

### Cost Centres

Cost centres allow Departments to organise and group their accounts to reflect their own departmental activities and set up. Expenditure (and income) is then allocated to the appropriate Cost Centre. This enables Departments to manually set budgets for each activity and monitor its performance.

*Eg. A Department may have cost centres for administration, laboratory managers, conferences, canteens or specific courses.*

The Cost Centre code is comprised of four characters: the first two are normally the Department code and the next two identify the particular activity or budget holder.

Each Department has automatically been set up with a standard set of Cost Centres covering activities such as administration, workshop, library, catering and research grants. Other Cost Centres specific to the Department can be added at the request of the Department. An example of some of the Finance Division’s codes is given below.

![Cost Centre](image)

The standard set that all depts. get.

**DO NOT USE**

The system uses code XXAG when it transfers data from the Research Grants Module to the General Ledger.

If your Department has any **trust funds** then you also use two specific Cost Centres:

- ZZYA: permanent trust fund capital
- ZZYB: spendable trust fund capital
Source of Funds codes

Funding for the University’s activities comes from many different sources. The University has a responsibility to its sponsors, donors, and government funders to separate, manage and report (in most cases) on the activities based upon the Source of Funds. There are currently (as at July 2015) 4,200 Source of Fund codes enabled on the system.

The Source of Funds code is represented by four characters, which are the same across all Departments. Although the list is very long there is a logical structure.

<table>
<thead>
<tr>
<th>1st Letter</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Balance sheet</td>
</tr>
<tr>
<td>A</td>
<td>Chest</td>
</tr>
<tr>
<td>B</td>
<td>Recoverable from external sources</td>
</tr>
<tr>
<td>C</td>
<td>Recoverable from internal sources (central use only)</td>
</tr>
<tr>
<td>E</td>
<td>General reserves</td>
</tr>
<tr>
<td>F</td>
<td>Specific reserves</td>
</tr>
<tr>
<td>G</td>
<td>Self-supporting activities</td>
</tr>
<tr>
<td>H</td>
<td>Specific donations</td>
</tr>
<tr>
<td>I</td>
<td>Specific endowments</td>
</tr>
<tr>
<td>J</td>
<td>Specific grants</td>
</tr>
<tr>
<td>K</td>
<td>Trust funds</td>
</tr>
<tr>
<td>L</td>
<td>Trust funds appropriations</td>
</tr>
<tr>
<td>M</td>
<td>Research grants and contracts</td>
</tr>
<tr>
<td>P</td>
<td>Building projects</td>
</tr>
<tr>
<td>R</td>
<td>General endowments (central use only)</td>
</tr>
<tr>
<td>T</td>
<td>Investment account (central use only)</td>
</tr>
<tr>
<td>U</td>
<td>Pension funds (central use only)</td>
</tr>
<tr>
<td>X</td>
<td>Associated bodies</td>
</tr>
<tr>
<td>Z</td>
<td>Depreciation (central use only)</td>
</tr>
</tbody>
</table>

Transaction Codes

Transaction Codes are used to describe the type of expenditure or income e.g. a book or room hire charges. Accurate selection of transaction codes is important for reporting and control purposes. The code consists of four characters. The first identifies the broad transaction category, the next three categorise the transaction in more detail.

E.g. If you were ordering some box files you would select transaction code ESBC
E: Expenditure on Consumables account
S: Stationery and Office Supplies
BC: Box Files

The first character of the transaction code
There are a number of broad categories but the ones you will most commonly use are:
E Consumables expenditure
L Other operating income
The majority of the time you will be selecting a code that relates to either expenditure or sales/fees. There are long lists for each, but as with sources of funds there is a logical sequence behind them and you may find the following paragraphs helpful. These are also available in Chapter 3 of the Financial Procedures manual.

1. Expenditure transactions codes starting with E***

- **A** Audio-visual and Multimedia
- **B** Library and Publications
- **C** Catering Supplies and Services
- **D** Medical, Surgical and Nursing Supplies and Services
- **E** Agricultural/Fisheries/Forestry/Horticultural Supplies and Services
- **F** Furniture, Furnishing & Textiles
- **H** Cleaning Materials & Equipment, Janitorial supplies
- **J** Utilities
- **K** Computer
- **L** Laboratory & Animal House Supplies and Services
- **M** Workshop & Maintenance Supplies (Lab and Estates)
- **P** Printing
- **Q** Telecommunications, Postal and Mail Room Services
- **R** Professional & Bought in Services
- **S** Stationery & Office Supplies
- **T** Travel & Transport (incl. Vehicle hire and subsistence)
- **U** Safety & Security
- **V** Vehicles (Purchase, Lease, Contract Hire)
- **W** Estates & Buildings
- **X** Miscellaneous/unclassified

2. Other Operating Income codes starting with L***

L codes can broadly be categorised as:

- **LA..** Other Services Rendered
- **LB..** Catering
- **LC..** Health & Hospital Authorities
- **LD..** Released from Deferred Capital Grants
- **LE..** Transfer from Cambridge Assessment
- **LF..** General Donations
- **LG..** University Companies
- **LH..** VAT Rebate
- **LJ..** Room Hire
- **LK..** Other
- **LL..** Discount Taken
- **LM..** Property Income
- **LN..** Press & Publications Income
- **LP..** Pensions Income
- **LR..** Computer Related Sales
- **LZA.** Overhead Recovery
- **LZB.** Labour Recovery
- **LZD.** Trust Fund Recovery
- **LZE.** Research Grant Revenue
Spare Code

There is a spare field at the end of the coding string in case the University decides to expand the accounting code structure in the future. The field must be populated with 0000 (four zeros) and is the only choice for this segment.
**Coding to Research Grants/Projects**

Many Departments in the University have their activities funded by research grants. In UFS, research grants are represented by:

*The award* – represents the research sponsor  
*The project* – the activity that the sponsor is funding

In the main, a grant will have a single award and project. However it is worth being aware that one award may fund several projects and in turn one project may be funded by several different awards. The coding structure for Grants and Projects is set out differently to that for the General Ledger codes. The Grants/Projects coding consists of 5 segments:

- Project
- Task
- Award
- Expenditure Type
- Organisation

**Project Code**

Linked to an award, the project code represents the project activity and has the department code in the first four digits, i.e. **ZZAG/T99** (ZZ being the department code).

**Task**

Projects are broken down into separate tasks to make the project easier to manage. Each task will have its own unique name. They could be described as “work parcels”.

**Award**

The award represents the specific funding from the sponsor. Each award is given a unique number and this is issued by Research Services. It will start with RG followed by 5 digits. (e.g. RG12345)

**Expenditure Type**

The category heading that the item falls under, picked from the List of Values. These are broad headings such as Travel, Equipment, Staff, Other Costs etc.

**Organisation**

Simply your department or sub-department code.

*A General Ledger account code will generate automatically from the above information. Do not manually type in a GL code for a grant/project.*
## The Oracle Toolbar

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigate to</td>
<td>Returns to the Navigator screen</td>
</tr>
<tr>
<td>Zoom</td>
<td>Invokes defined zoom and goes to that form within the system (Unable to use)</td>
</tr>
<tr>
<td>Save</td>
<td>Saves any pending changes</td>
</tr>
<tr>
<td>Print</td>
<td>Prints current screen or print a report (Do not use)</td>
</tr>
<tr>
<td>Close form</td>
<td>Closes the form (screen) you have open.</td>
</tr>
<tr>
<td>Find</td>
<td>Choosing once invokes the query mode; choosing again runs a query.</td>
</tr>
<tr>
<td>New Record</td>
<td>Creates a new record or line</td>
</tr>
<tr>
<td>Delete Record</td>
<td>Deletes the current record from the database.</td>
</tr>
<tr>
<td>Clear Record</td>
<td>Clears all data pertaining to current record in window.</td>
</tr>
<tr>
<td>Folder Tools</td>
<td>Displays the Folder tool palette. (Separate guide on folder tools)</td>
</tr>
<tr>
<td>Attachments</td>
<td>Opens the Attachments window.</td>
</tr>
<tr>
<td>Edit</td>
<td>Opens the Editor window for the current field.</td>
</tr>
<tr>
<td>Window Help</td>
<td>Displays general help for the current application.</td>
</tr>
<tr>
<td>Responsibilities</td>
<td>Displays other responsibilities (only available within the Navigator Window).</td>
</tr>
<tr>
<td>------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Cut</td>
<td>Cuts the description of the field you are currently clicked in</td>
</tr>
<tr>
<td>Copy</td>
<td>Copies the description of the field you are currently clicked in</td>
</tr>
<tr>
<td>Paste</td>
<td>Pastes the description you have just cut or copied</td>
</tr>
<tr>
<td>Next Step</td>
<td>Updates workflow in the Navigator by advancing to the next step in the process (<em>Unable to use</em>)</td>
</tr>
<tr>
<td>Transitions</td>
<td>Opens the Translations window (<em>Unable to use</em>)</td>
</tr>
</tbody>
</table>
Completing a UFS form

Regardless of which task you need to perform in UFS, there are several common principles that feature throughout. This section will illustrate those principles.

- Information will automatically default in to some fields as soon as the form is opened.
- If you click into a field and it turns yellow, it is a mandatory field and therefore must be completed before you can move on.
- Some forms will have several tabs containing different fields. The tab that is currently selected will be coloured blue.
- If you click into a field and the • icon appears, this signifies that there is a list of values to choose from, which can be accessed by clicking on the three dots or by pressing Ctrl+L on your keyboard.
- If you click into a field and the • icon does not appear, this signifies that it is a free text field; meaning that you can type freely to include any appropriate information.
- The % symbol acts as a wildcard in UFS when searching for information.
  
  E.g. if you needed to raise a purchase order to Office Depot to order some stationery, in the supplier field you could enter Office% to find all of the University’s suppliers beginning with Office.
- Important messages will appear at the bottom left hand side of the screen, such as confirming that your work has been saved when you click the save icon on the toolbar, or letting you know if you are trying to proceed without completing a mandatory field.

If you prefer to use the keyboard instead of the mouse, some of these keyboard shortcuts will benefit you when navigating around a form.

- **List of Values**  Ctrl L
- **Save**  Ctrl S
- **Edit**  Ctrl E
- **Exit**  F4
- **Clear Field**  F5
- **Clear Record**  F6
- **Clear Form**  F8
- **Duplicate Field**  Shift F5
- **Duplicate Record**  Shift F6
- **Query Enter**  F11
- **Query Run**  Ctrl F11
**Keyboard Shortcuts**

If you prefer to use the keyboard instead of the mouse, some of these keyboard shortcuts will benefit you when navigating around a form.

- **List of Values**  Ctrl L
- **Save**  Ctrl S
- **Edit**  Ctrl E
- **Exit**  F4
- **Clear Field**  F5
- **Clear Record**  F6
- **Clear Form**  F8
- **Duplicate Field**  Shift F5
- **Duplicate Record**  Shift F6
- **Query Enter**  F11
- **Query Run**  Ctrl F11
# UFS Jargon Buster

<table>
<thead>
<tr>
<th><strong>UFS Jargon</strong></th>
<th><strong>Translates to …….</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>AP</td>
<td>Accounts Payable module. Paying supplier invoices.</td>
</tr>
<tr>
<td>AR</td>
<td>Accounts Receivable module. Raising sales invoices and accounting for income.</td>
</tr>
<tr>
<td>Award</td>
<td>Represents the source of funding</td>
</tr>
<tr>
<td>CAPSA</td>
<td>Name given to set up Oracle in 2000.</td>
</tr>
<tr>
<td>Category</td>
<td>Code given to classify goods and services purchased.</td>
</tr>
<tr>
<td>Chart of Accounts</td>
<td>University account code structure.</td>
</tr>
<tr>
<td>Cost Centre</td>
<td>Reflects each activity within the department.</td>
</tr>
<tr>
<td>CRSid</td>
<td>User identity; usually comprised of your initials followed by two to four digits.</td>
</tr>
<tr>
<td>(C)UFS</td>
<td>(Cambridge) University Finance System.</td>
</tr>
<tr>
<td>Distributions</td>
<td>Process of charging expenditure or allocating income.</td>
</tr>
<tr>
<td>Expenditure Type</td>
<td>The category heading used to classify expenditure when coding to a project.</td>
</tr>
<tr>
<td>Favourites</td>
<td>Set up on the E-Business Suite Homepage to create shortcuts through to frequently used tasks.</td>
</tr>
<tr>
<td>Folder Tools</td>
<td>Allows you to customise the look of some forms.</td>
</tr>
<tr>
<td>General Ledger</td>
<td>Heart of the accounting system that collates information on all processed transactions.</td>
</tr>
<tr>
<td>(GL)</td>
<td></td>
</tr>
<tr>
<td>iProc</td>
<td>The iProcurement module for all your purchasing needs</td>
</tr>
<tr>
<td>Navigator</td>
<td>Screen that displays all of the tasks available within the selected responsibility.</td>
</tr>
<tr>
<td><strong>UFS Jargon</strong></td>
<td><strong>Translates to ……</strong></td>
</tr>
<tr>
<td>------------------</td>
<td>----------------------</td>
</tr>
<tr>
<td>Personal Profile</td>
<td>Used to store specific defaults such as your printer and telephone and fax numbers.</td>
</tr>
<tr>
<td>Preferences</td>
<td>Used to change your UFS login password as well as amend your Personal Profile</td>
</tr>
<tr>
<td>Project Code</td>
<td>Usually the same as the warrant number</td>
</tr>
<tr>
<td>Responsibility</td>
<td>Ability to use a specific area of the system.</td>
</tr>
<tr>
<td>Source of Funds</td>
<td>Used to distinguish where funds have originated from.</td>
</tr>
<tr>
<td>Task</td>
<td>Splits a project into manageable “work parcels”. EM uses the building code.</td>
</tr>
<tr>
<td>Transaction Code</td>
<td>Describes the type of item that is being purchased or sold.</td>
</tr>
<tr>
<td>Top Ten List</td>
<td>List of frequently used tasks that displays on your Navigator screen. It is specific to each responsibility.</td>
</tr>
<tr>
<td>UFS</td>
<td>University Finance System.</td>
</tr>
<tr>
<td>UOM</td>
<td>Unit of Measure.</td>
</tr>
<tr>
<td>Wild card</td>
<td>The % symbol, used to assist when searching for information.</td>
</tr>
</tbody>
</table>
### UFS Helpdesk Information

**Accounts Payable**  
Telephone: (7)66888  
Email: UFS_AP@admin.cam.ac.uk

**Accounts Receivable**  
Telephone: (3)32215  
Email: UFS_AR@admin.cam.ac.uk

**General Ledger Journals**  
Telephone: (3)39660  
Email: UFS_GLJ@admin.cam.ac.uk

**General Ledger Reporting**  
Telephone: (7)65098  
Email: UFS_GLR@admin.cam.ac.uk

**Purchasing**  
Telephone: (7)65101  
Email: UFS_PO@admin.cam.ac.uk

**Inventory**  
Telephone: (7)66780  
Email: UFS_INV@admin.cam.ac.uk

**Research Grants**  
http://www.research-operations.admin.cam.ac.uk

**Fixed Assets**  
Telephone: (7)66780  
Email: UFS_FA@admin.cam.ac.uk

**General Queries and Password resets**  
Telephone: (7)65999  
Email: UFS_Enquiries@admin.cam.ac.uk

**New User Access**  
Telephone: (7)65999  
Email: UFS_Users@admin.cam.ac.uk
Other Finance Training courses

There are a number of Finance Training courses to assist you in getting started with use of UFS and these include:

**An Introduction to University Finance** – An introduction to University Finances and the Finance System.

**iProcurement: Buyers** – This course enables users to learn how to request goods/services required for their role using the new purchasing module. This training is mandatory in requesting iProcurement Buyer responsibility.

**iProcurement: Requisitioners** – This course enables users to learn how to request goods/services required for their role using the new purchasing module. This training is mandatory in requesting iProcurement Requisitioner responsibility.

**AP Part 1: Getting started in Accounts Payable** - This on-line course will enable end users to understand the basics of accounts payable, including processing basic invoices and expense claims.

**Accounts Payable: Using Shared Services** - This on-line course has two purposes. To enable end users to understand which AP processes are completed by the department and which by Shared Services and to explain how to carry out the departmental processes.

**AR Part 1: Getting Started in Accounts Receivable** – The Accounts Receivable (AR) module of the University’s Finance System (CUFS) deals with managing customer information and managing income generated from sales and donations.

**GL Part 1: Getting Started in the General Ledger** – This course enables users to learn the basics of how the General Ledger module works, how to run online account enquiries and how to process journals.

**Fixed Assets** – A course for departmental staff who deal with purchasing, monitoring and disposal of fixed assets.

**Grants Part 1: Getting Started in Research Grants** – A short on-line course that provides a basic introduction to the key features of Research Grants and how they are managed in the University.

For further information on these and other available courses, please refer to the Finance Training course page.