Assigning local purpose codes

Staff with a Themis responsibility of UOM Manager Dept or UOM Manager Faculty will have the ability to assign access to view Local Purpose Codes within their department to staff within the University. This will enable the staff to run the Local Purpose Codes Balances and Transactions report to track income and expenditure attached to specific Local Purpose Codes to which they have been granted access.

To assign a Group Code

1. Log on to Themis using the UOM Manager Dept or UOM Manager Faculty responsibility.
2. In the Navigator, select the UOM Local Purpose Code Access function. The Local Purpose Code Access screen will display.

Note: currently, no restrictions have been applied to the Employee field (i.e. you may grant any employee within the University to view local purpose code information for your department). Security has been applied to the Budget Unit field (i.e. you may only allocate local purpose codes from the Budget Unit(s) for which you have been granted access).

3. In the Employee field, enter the name of the staff member for which you wish to grant access. Alternatively, you may use the List of Values (LOV) to retrieve the appropriate staff member. Note: as the Employee table contains a list of all staff members within the University, it is recommended that you enter a partial value (e.g. surname) when searching for a staff member rather than perform a % wildcard search (i.e. do not perform a search with only "%" entered in this field).

4. Enter the appropriate Budget Unit. Alternatively, you may use the LOV to retrieve the appropriate Budget Unit.

5. In the Local Purpose Code field, enter the codes to which the staff member will have access. Note: staff members may be granted access to codes across a number of budget units if required (e.g. if the staff member is in a Faculty).

Alternatively, you may use the LOV to select the appropriate code. Note: selecting "T" in the Local Purpose Code field will assign users access to all codes associated with a Budget Unit.

6. Enter a Start Date and/or End Date for the staff access if required. Note: these fields are optional.

7. Click on the Save icon on the Toolbar once all the required codes have been entered. A message advising that the records have been saved will display at the bottom left of the screen.

FRM-4040C: Transaction complete: 2 records applied and saved.