

Unit Financial System (UFS)

User Guide

Guide to Access Request Form - Web UFS and Web UFS New Node

Determine Type of Request

You have a new unit and need to gain access to it. You first need to decide if the unit can be added into **an existing node** or if a **new node ID** needs to be created. **What is a node ID?** Web UFS requires units to be set up and organized with a node ID. A node ID (think data base) is linked to a primary unit number and can contain many additional units and/or subunits. Units in each node ID will share data related to vendors, customers, cashiers, where applicable.

1. The new unit can be added into an existing node. **Do you have access to the existing node?**
 - a. If you have access to the node, you will add the new unit under the Maintenance menu.
 - b. If you don't, you will need to request access to the existing node.
2. The new unit cannot be added into an existing node.
 - a. You will need to request a new Web UFS Node and gain access to it.

- [Adding a New Unit to Existing Node \(link when training page updated\)](#)
- [Request Access to an Existing Web UFS Node](#)
- [Requesting a New Web UFS Node](#)

To begin a request, you must first select the Employee Type and enter the required information for that employee type then click on Retrieve to bring up the employee's profile.

- **USA Employee:** Employee ID - 7-digit number located on the employee's pay statement.
- **Canada Employee:** Employee Benefits ID - four-digit number, if you don't know it you will need to contact the Sodexo HR Benefits Administrator.
- **Contractor, Temp, or Intern:**
 - Create new – Enter users first name, last name and select sponsoring managers location. USA – enter managers employee ID. Canada – enter managers HR Benefits ID.
 - Retrieve existing – Enter last name of employee, find name in list and double click. Info will auto fill on the right side. Select sponsoring managers location. USA – enter managers employee ID. Canada – enter managers HR Benefits ID.

Requesting Access to a Web UFS Node

1. For **Web UFS Access** expand Finance and select **Web UFS**. Do not choose Web UFS New Node. This is to create a new Web UFS Node ID.
2. Select Request Type (Update or Delete)
3. Click the red X to remove any nodes that are no longer required
4. Under Select Data section, enter the desired unit #, click on unit # and click the "Lookup Node>>>" button. The node ID will populate in the box next to unit #.

- If this is a new node, “undefined” may display instead of the unit name. It is ok to proceed with the access request)
 - UFS access is per the Web Node not the individual units. It is only necessary to use one unit assigned to the node to lookup node.
 - It is suggested to use an existing unit in the node to lookup node. A “new unit” may not populate the node ID if it was not part of the initial node creation.
 - If “node ID not found” error is indicated and not the node ID, reach out to the [UFS Administrator](#) to see if a node exists or if one needs to be created.
5. Select level of Access. (Administrator – Full access to all menu options. CS Vending Warehouse – Vending import. Data Entry – limited access to certain menu options. e-Pay – electronic invoice processing only.)
 6. Select UFS Category per the unit’s business line and node type.
 7. Submit the request for processing.

Note: Only one request for UFS access should be submitted per day. If multiples are submitted / completed in the same day, only the most recent will be fulfilled. This may cause some loss of access.

Requesting a New Web UFS Node

1. To request a new **Web UFS Node**, expand Finance and select **Web UFS New Node**. Do not choose Web UFS as this is to request access for an existing node.
2. Select Request Type (New or Existing Unit)
3. Enter Unit Opening Date
4. Select the correct business line. (This indicates the type of Web UFS Node you are creating. If you select the incorrect business line, the wrong type of node will be created. A node type determines the GL Accounts that are available to you as well as what menu options within UFS you will see.)
5. Enter the 8-digit SAP Unit Number
6. Enter Unit Name (becomes node name)
7. Choose State in which unit operates using drop down arrow.
8. Add all sub-units that will be included in this new node. If you omit a unit, this may affect future access requests. (if there are any sub-units added down the road, please advise the [UFS Administrator](#) so this can be connected back-end)
9. Submit the request for processing. Once a “completed” email is received, you will need to request access to this new node. Once access is completed, you will need to perform a new node configuration.

- [Configuring a New Web UFS Node](#)

Check Request Status

You will receive email notifications from **Sodexonet_Admin@sodexo.com** when your request is approved, rejected, cancelled, or completed. To view the status of your requests, you can click **View Status** on the **Information Security Access Request** homepage at any time.