FINANCIAL SYSTEMS & INNOVATIONS – ACCESS PROTOCOL

Requirements before Finance Systems:

1) Setup UCID with HR and person record is entered in Banner HR. Once you receive a confirmation the new employee has been setup in Banner HR, please perform the following:
   a. Contact the help desk to add new employee (UCID and full name) for access to division41 folders. Request to mirror a profile in your department
   b. Contact FSI department (financesecurity@njit.edu) for access to Banner and complete the forms using this link (http://www.njit.edu/finance/forms-fsi/)
2) If new equipment is required, check your budget for funds or send a request to the budget office. Contact FSI for temporary hardware component(s). FSI will coordinate
3) Sign up for training

Self-Service Banner:

1) Users may access the link for Finance Access Forms page (http://www.njit.edu/finance/forms-fsi/), and direct them to the 'SSB Banner Access Form'.
2) Users have two options to submit their request:
   a. Fill out the form on their computer, then print it for signature.
   b. Or they can print a blank form and write in the information, including the index(es) and type of access they're requesting.
3) The printed copy must be signed and dated by their supervisor and email the document to financesecurity@njit.edu or sends the form through interoffice mail.
4) FSI processes the request by granting Fund & Org access based on the Index. This can be Query only or Query and Requisition entry. We will also grant either Requisition Approval or Invoice Approval if noted on the form.
5) Once complete, an email confirmation is sent to the user and authorizer.

Banner 9 Administrative Pages:

1. Access to this system is managed by the FSI department. Discussion meeting is usually required to understand what information users need. The forms in Banner 9 are used by the finance back office.

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Anthony Travel:

1) Users may access the link for Finance Access Forms page (http://www.njit.edu/finance/forms-fsi/) and direct them to the 'Anthony Travel Access Form (new)'.
2) The user selects the link which directs them to a Google form. The system prompts them to login using their UCID and password. They fill in their info (Name, UCID, Title, Dept, Phone), the 'Authorizers' name and email (Supervisor or higher up who will approve the request) on the first page, and Chart of Account/Index(es) on the second page and submit.
3) The Authorizer receives a system generated email requesting to <u>forward</u> the email (with the form attached) to financesecurity@njit.edu and state 'I Approve' in the body of the email
4) FSI receives the Authorizer's email and processes the request. Fund & Org access is granted based on the index(es) listed on the form.
5) The user is added to the PPACMNT form to complete access to Anthony Travel
6) An email confirmation is sent through google sheet to the user and authorizer providing the request is complete and how the user can access Anthony Travel from the Highlander Pipeline page.

Chrome River:

1) All NJIT Employees are automatically provided access to Chrome River

Highlander eMerchant:

1) Users may access the link for Finance Access Forms page (http://www.njit.edu/finance/forms-fsi/) and direct them to the 'Highlander e-Merchant Access Request Form'.
2) The user selects the link which directs them to a Google form. The system prompts them to login using their UCID and password. Users complete the following:
   a. Users information (Name, UCID, Title, Dept, Phone),
   b. 'Authorizers' name and email (Supervisor or higher up who will approve the request)
   c. 2nd Page - Select Type (Faculty, Staff or Student)
   d. 3rd Page - Procurement Access (Buyer, Browser or Other)
   e. 4th Page - Chart of Account and Index(es)
3) The Authorizer receives a system generated email requesting to <u>forward</u> the email (with the form attached) to financesecurity@njit.edu and state 'I Approve' in the body of the email

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4) FSI receives the Authorizer's email and processes the request. Fund & Org access is granted based on the index(es) listed on the form. In addition they may also be assigned a department outside of their home department.
5) An email confirmation is sent through google sheet to the user and authorizer providing the request is complete and how the user can access Highlander eMerchant website.

Marketplace / Touchnet:

1) User contacts FSI, and Steve St. Edward responds with all necessary information.

Gourmet Dining Services:

1) FSI provide access and approval. Please contact the FSI department for any changes/additions.

Cognos:

1) User sends an email to financesecurity@njit.edu listing out their request.
2) FSI process request and send an email confirmation.

BDMS:

1) User sends an email to financesecurity@njit.edu listing out their request.
2) FSI process request and send an email confirmation.

ePrint:

1) Please send an email to Scott Sherman (scott.sherman@njit.edu) to request access once your single-sign on is established.

Monarch:

1) FSI controls 15 license for use within the Finance Division. The license is active only on the users desktop.

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Executive Budget Management Report:

1) Budget office provides user information to FSI for access.