

Purchasing Authority & Access to Funds & Orgs

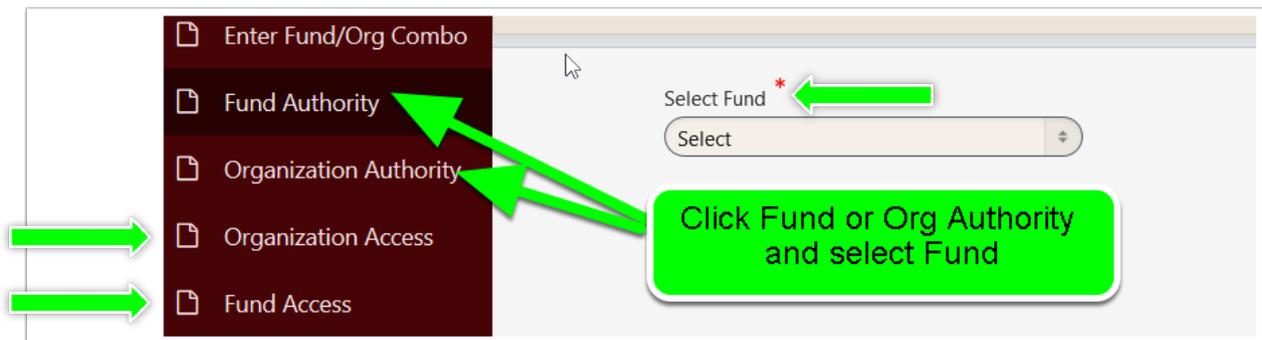
Introduction The Purchasing Office is reintroducing a financial access tool on mySwarthmore that allows financial managers to make changes to query and purchasing delegations of their accounts online. This change is part of the Purchasing module implementation in Banner. The new role in Banner assigns ‘Purchasing Authority’ to financial managers and enables them to delegate purchasing access to other Banner users. In the past, the delegation of purchasing authority and access was tracked in a hard copy form through the Business Office. This new role in Banner allows for electronic tracking and reporting of these access rights and allows for automated controls on purchases made in the eMarket Portal and Chrome River.

Inquiries regarding Financial Manager Fund/Org authority and access (Purchasing, Query, Add/Delete) may be directed to the following:

- Capital Funds - Joe Cataldi; 610-328-8676, jcatald1@swarthmore.edu
- Restricted Funds - Denise Risoli, 610-328-7810, drisoli1@swarthmore.edu
- Grant Funds – Christy Brydges, 610-328-8390, cbrydgel@swarthmore.edu
- Operating Funds - Ernest Wright, 610-957-6353, ewright3@swarthmore.edu

Section I. Administering Purchasing and Query Access for Financial Managers

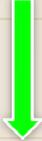
1. Log into mySwarthmore
2. Click ‘Finance’ from the Main Menu
3. Click ‘Financial Reporting’
4. To change the access of users on a fund or org where you are financial manager, choose ‘Fund Authority’ or ‘Organization Authority’ on the left toolbar. To check your personal access use ‘Fund Access’ or ‘Organization Access.’ Note: if you are not financial manager of a fund/org, the ‘Authority’ menu options will not be visible on mySwarthmore.



5. If you have more than one account, select the fund or org you wish to change from drop down list. From this view, all the users with current access should be visible [Query, Purchasing, or Remove]. Note: Purchasing access automatically includes the right to query on mySwarthmore.

Select Fund *
91037 Business Office Equip Rplcmnt

Existing User Access

User Name	Current Access	Pending Access Request	
Joseph Cataldi		PURCHASING	 Edit

1 - 1

Add New User

6. To change any user's access, click 'Edit' and 'Select' [Query, Purchasing, or Remove]. Note: Remove takes away all access from that individual.

Fund
23130 SBC Capital Reserve

Requested Access *
Select

Cancel Submit

Select:
Query
Purchasing
Remove



7. Click 'Submit'
8. After submission, the status will be 'Pending' until the change is made in Banner. Please allow for 2-3 days of processing time for the updates to be made in the system. When the change becomes live, it will be listed in the column 'Current Access.'

Fund Access Request for Joseph Cataldi

Fund
91037 Business Office Equip Rplcmnt

Requested Access *
Purchasing

Cancel Submit



Add New User

1. Click on 'Add New User'
2. Search for the user
3. Select the user from the results
4. Select the requested access (Query, Purchasing or Remove)
5. Submit

Search for the new User

Search Result		
Hearty, Patricia A.	PHEARTY1	Hearty, Patricia A.

1 - 2

Select Fund *
23130 SBC Capital Reserve

User Name	Current Access	Pending Access Request
Alice Turbiville	Purchasing	Edit

1 - 1

Click: Add New User

Add New User

Section II. Verifying Query & Purchasing Access for non Financial Managers

To Check Current Budget Access

1. Log into mySwarthmore
2. Click 'Finance' from the Main Menu
3. Click 'Financial Reporting'
4. Click 'Organization Access' or 'Fund Access' from the toolbar on left

The screenshot shows the 'Financial Reporting' interface. On the left is a dark sidebar with a menu containing 'Enter Fund/Org Combo', 'Agency Detail', 'Organization Access', and 'Fund Access'. The 'Organization Access' and 'Fund Access' items are highlighted with green arrows. The main content area is titled 'Budget Reporting Parameters' and contains several dropdown menus: 'Select Fund:' (with a red asterisk), 'Select Activity' (with a question mark), 'Select Fiscal Year:' (with a red asterisk), and 'Select Time Period:' (with a red asterisk). A blue 'Submit' button is at the bottom. A green callout box with a white border and rounded corners contains the text 'Click to see your Org or Fund access' and has two green arrows pointing to the 'Organization Access' and 'Fund Access' menu items.

5. You will see your current access [Q-Query or P-Purchasing] and the name of the financial manager of the account is listed on the far right.

User Id	User Name	Department	Default Program	Access	Financial Manager
GBROWN1	Gregory Brown	7165 Grounds	51	Q	Jabco, Jeffrey
GBROWN1	Gregory Brown	7211 Insurance	41	Q	Turbiville, Alice
GBROWN1	Gregory Brown	7235 Bookstore	71	Q	Dale, Paula

6. To request a change to your access, please contact the financial manager who is able to request the change via MySwarthmore.