Purchasing Authority & Access to Funds & Orgs

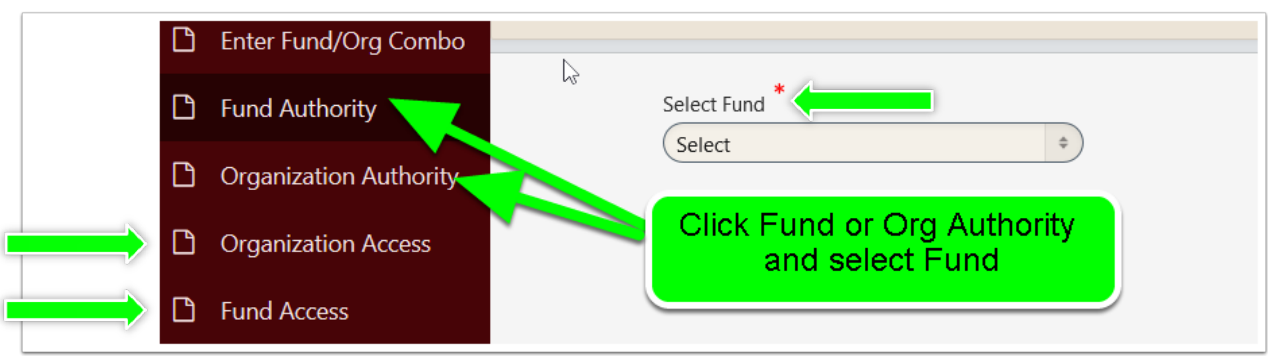
Introduction The Purchasing Office is reintroducing a financial access tool on mySwarthmore that allows financial managers to make changes to query and purchasing delegations of their accounts online. This change is part of the Purchasing module implementation in Banner. The new role in Banner assigns '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:

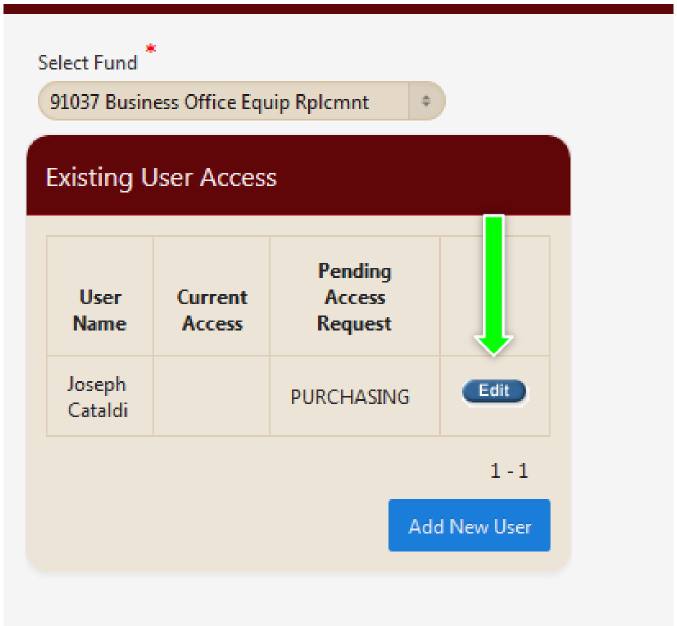
- Capital Funds - Joe Cataldi; 610-328-8676, jcatald1@swarthmore.edu
- Restricted Funds - Denise Risoli, 610-328-7810, drisoli1@swarthmore.edu
- Grant Funds – Christy Brydges, 610-328-8390, cbrydge1@swarthmore.edu
- Operating Funds - Ernest Wright, 610-957-6353, ewright3@swarthmore.edu

Section I. Administering Purchasing and Query Access for Financial Managers

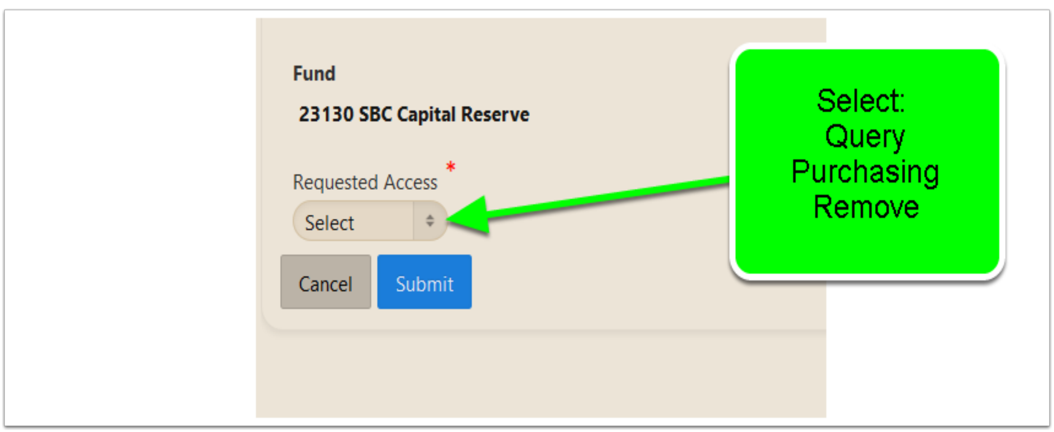
1. Log into mySwarthmore
2. Click 'Finance' from the Main Menu
3. Click 'Financial Reporting'
4. To change the access of users on a fund or org where you are financial manager, choose 'Fund Authority' or 'Organization Authority' on the left toolbar. To check your personal access use 'Fund Access' or '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.

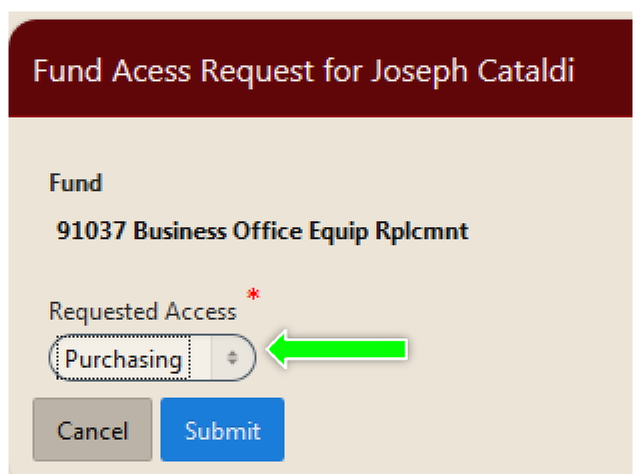


6. To change any user's access, click 'Edit' and 'Select' [Query, Purchasing, or Remove]. Note: Remove takes away all access from that individual.



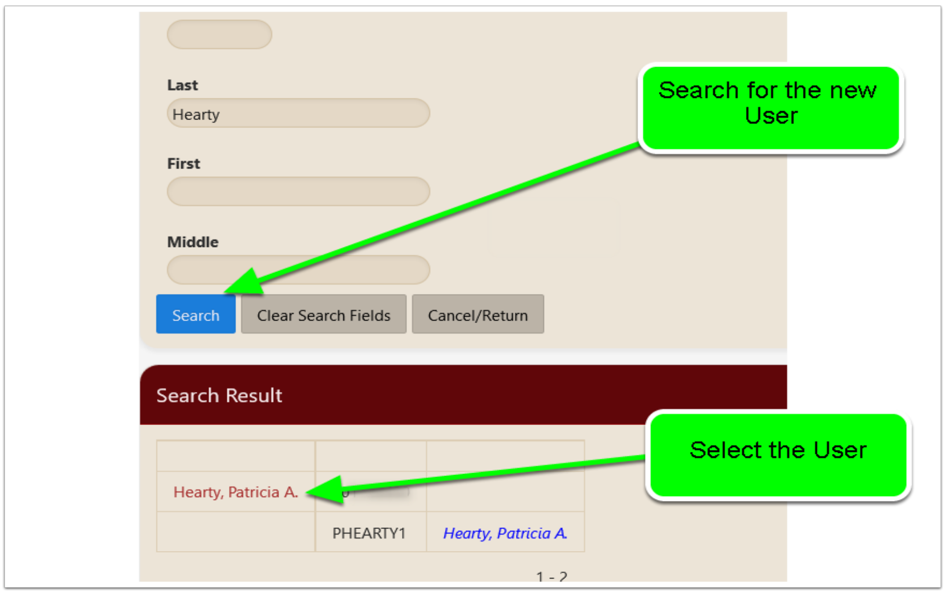
7. Click 'Submit'

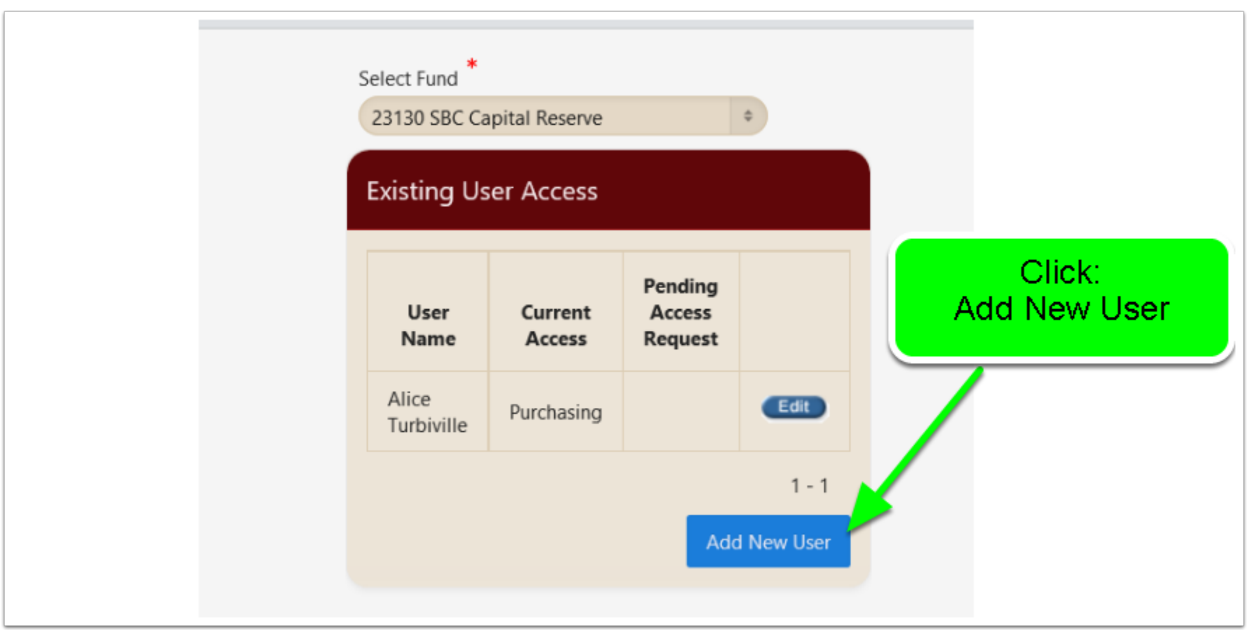
8. After submission, the status will be 'Pending' until the change is made in Banner. Please allow for 2-3 days of processing time for the updates to be made in the system. When the change becomes live, it will be listed in the column 'Current Access.'



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

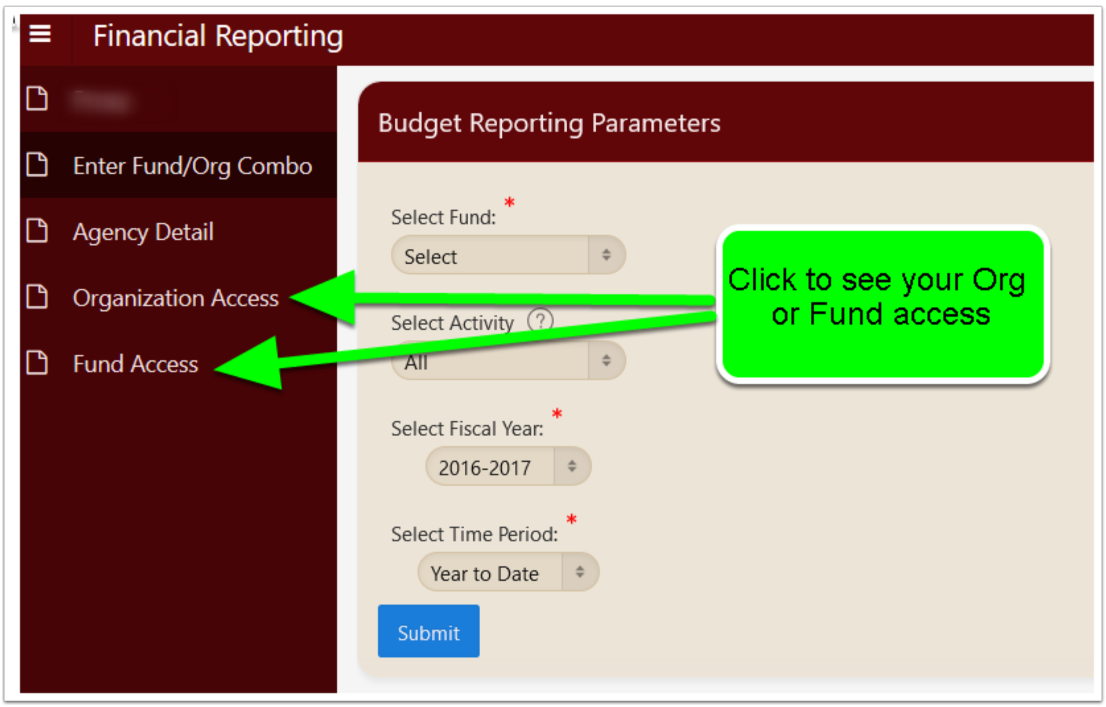




Section II. Verifying Query & Purchasing Access for non Financial Managers

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



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.