

Tracking State and Research Purchase Authorizations and Budget Report Recipients on Self-Serve

Last Updated: 8/15/2012

How to Access Self-Serve?

- From on-campus, type the following address into a web browser: <http://selfserve.upstate.edu>
- From off-campus, access to Self-Serve is only available through the Upstate iPage. On the Upstate homepage, click on the iPage link in the upper right corner. Then, the link for Self-Serve is among the bulleted list of links in the upper left corner underneath All Staff.

If you need assistance recalling your Oracle password, try to click on the “Reset Password” link on the Self-Serve login screen. Fill in your SUNY Upstate employee ID number and birthdate. If it is a correct match, your Self-Serve (Oracle) password will be reset. The default pattern used for the password will be described on screen after the reset is successful. After logging into Self-Serve with the auto-generated password, you'll be required to change the password. If you still need assistance, contact the IMT Help Desk at 464-4115.

How to view current authorizations to the account codes I manage?

1. Log into Self-Serve and click on Department Information / My Departments
2. Click on a department link or use the search form to access the Department Details page

State University of New York
Upstate Medical University administrative information systems

My Information Department Information Help Home Log Out

My Departments Directory My_Departments

- This search form provides a faster way to access the employee or department records you've been authorized to view. In some situations you may be able to update information, as well.
- To modify your employee or department list, please fill out an [Oracle Account Request form](#) and submit to IMT-AIS.

Employee Choose an Employee
Department Choose a Department

Select from menu and submit or click on link
Training Data:
[LEAD ENTERTAINERS \(12345678\)](#)

Reset Submit

3. Click on the Purchase Authorizations and Budget Report Recipients link

State University of New York
Upstate Medical University administrative information systems

My Information Department Information Help Home Log Out

Department Details

At a Glance

Department:	LEAD ENTERTAINERS	Active Employees (10)	State (5)
Dept Code:	12345678		RF (0)
Dept Head:	Roy Rogers		HSC (5)

Areas of Information

		View	Update
Accounting and Budgeting	Purchase Authorizations and Budget Report Recipients	*	*
Employee Health	Employee Health Information	*	

4. The drop-down box circled below will list all active accounts accessible to the current user, as either the department head or account owner. Selecting a new department from the list will show you those people who have authorization for that account, in addition to those people who are located in the department with purchase authorizations for other accounts.

- Click on the "View in Excel" link (circled below) to view and/or save an Excel spreadsheet with **ALL** of your account code authorization data in one place.

UPSTATE administrative information systems
UNIVERSITY HEALTH SYSTEM

My Information Department Information Applications Reports Help Home Log Out

Purchasing Authorizations

[Return to Department Details](#)

LEAD ENTERTAINERS (12345678) ▼

Department Grants Insert Form Help

[View in Excel](#) [View Purchasing Tiers](#) Click on Employee Name or Account/Project Number to Modify Permissions

James K Dean (Emp_ID: 81312)
Lead Entertainers
Authorized Accounts: 1

Account/Project	Description	Can Purchase	Campus/Research Max	Hospital Standard Max	Hospital Special Max	Budget Reports
12345678	LEAD ENTERTAINERS	Yes				No

NEW – August 2012 – Maintain Grant Authorizations on Self-Serve

If you are a Research project grant owner, you now have rights to manage who can create and submit purchase requisitions, as well as who can electronically sign Payroll RF Change forms per project number.

Click on the Grants tab to view current authorizations for your projects.

How to add a new authorization record?

- Click on the Insert Form tab

Purchasing Authorizations - Add New Record

[Return to Purchase Authorizations Home](#)

Department Grants **Insert Form** Help

- [Switch to Multi Records Insert Form](#)

Account Code Privileges Select a State Account or Research Project ▼
← Select Account Code to Begin

Employee Select Employee ▼

Authorized to Purchase? No Yes

Campus/Research Limit No Limit ▼

Self-Serve Permissions **Online Purchase Requisitions [?]** **Online Payroll RF Forms [?]**
(Research Only) View Only Create Requisitions Create and Submit Requisitions Not Authorized Signing Designee

Comments

- The default form will allow you to insert one record. However, if you want to authorize someone to have access to multiple accounts, you may use the Multi Records Insert Form (steps outlined below).

- To begin with the Single Record Insert Form, select an account from the drop-down box. It is necessary to start with the account number in order to identify if the account is a research project, or state campus/ hospital account in order to customize the rest of the insert form.

Purchasing Authorizations - Add New Record

[Return to Purchase Authorizations Home](#)

Department	Grants	Insert Form	Help
------------	--------	--------------------	------

• [Switch to Multi Records Insert Form](#)

Account Code Privileges	12345678 - LEAD ENTERTAINERS - State		
Employee	Select Employee		#4
Authorized to Purchase?	<input checked="" type="radio"/> No <input type="radio"/> Yes		#5
Campus/Research Limit	No Limit		#6
Budget Reports - Campus	<input checked="" type="radio"/> No <input type="radio"/> Yes		#7
Comments			

- Next, pick the Employee from the drop-down box (see # 4 above). This list includes all persons with an active affiliation status with SUNY Upstate Medical University. If there is a question with regards to someone that does not show up in this list, click on the help tab and use the feedback form to inquire.
- Do you authorize this person to make purchases with this account code? If so, click Yes. (see # 5 above)
- By default, there is no limit to the purchasing amount, however, if you wish to impose a limit on their authorization, select a tier from the drop-down list (see # 6 above)
- Would you like this employee to be able to retrieve budget reports for this account code? If so, click Yes for Budget Reports (see # 7 above)
- To complete, click on the Insert button.

Options for adding a new authorization record for a research project account?

- If you've selected a Research account from the Account Code Privileges drop-down box, the insert form will look slightly different (see below) with specific Self-Serve Permissions fields that are pertinent to Research projects only.
 - Online Purchase Requisitions - There is an application in Self-Serve for creating and submitting RF purchase requisitions online. Use this purchase authorizations form to determine what rights the user has for the requisitions application. The default level of access is to allow the user to create the requisition only. In order for the requisition to be submitted to purchasing, the grant owner/PI would have to go into Self-Serve and submit the requisition.
 - Online Payroll RF Forms - You may use these purchase authorizations forms to determine who has rights to electronically sign the new RF Payroll Change Forms application that is now on Self-Serve, per project.

Purchasing Authorizations - Add New Record

[Return to Purchase Authorizations Home](#)

Department	Grants	Insert Form	Help
<ul style="list-style-type: none">Switch to Multi Records Insert Form			
Account Code Privileges	1111111 - MONROE, MARILYN - Research		
Employee	Select Employee		
Authorized to Purchase?	<input checked="" type="radio"/> No <input type="radio"/> Yes		
Campus/Research Limit	No Limit		
Self-Serve Permissions (Research Only)	Online Purchase Requisitions [?] <input type="radio"/> View Only <input checked="" type="radio"/> Create Requisitions <input type="radio"/> Create and Submit Requisitions	Online Payroll RF Forms [?] <input checked="" type="radio"/> Not Authorized <input type="radio"/> Signing Designee	
Comments	<div style="border: 1px solid gray; height: 40px;"></div>		
<input type="button" value="Reset"/> <input type="button" value="Insert"/>			

How to add multiple records (Multi-Record Insert Form)?

1. Click on the Insert Form tab and then click on the “Switch to Multi Records Insert Form” link.
2. Select the Employee from the drop-down box (see # 2 below). The form will reload after you select the employee, and pre-fill the Multi-Record Insert Form with the employee’s name and department.

Department	Grants	Insert Form	Help
<ul style="list-style-type: none">Switch to Single Record Insert Form			
Employee	Select Employee	#2	

3. To select multiple accounts, hold down the control key while clicking. If you need to start over, click the reset button to clear the selections.
4. Complete the remainder of the insert form. Note, all values will be assigned to each of the selected account codes, as applicable. For example, if you’re mixing a selection of State and Research accounts, and you’ve selected the options for Self-Serve Permissions, those will only be applied to the Research accounts.

Employee	Joe Dokes	Emp_ID 73799
Department	LEAD ENTERTAINERS	
Account Code Privileges:		
State Accounts:		Research Grant Projects:
<div style="border: 1px solid black; padding: 2px;"> 12345678 - LEAD ENTERTAINERS 23456789 - SENIOR ENTERTAINERS </div>		<div style="border: 1px solid black; padding: 2px;"> 1111111 - MONROE, MARILYN </div>
Authorized to Purchase	<input checked="" type="radio"/> No <input type="radio"/> Yes	
Select Maximum Tiers		
Hospital - Standard	<input type="text" value="No Limit"/>	
Hospital - Special	<input type="text" value="No Limit"/>	
Campus/Research	<input type="text" value="No Limit"/>	
Budget Reports		
Campus	<input checked="" type="radio"/> No <input type="radio"/> Yes	
Hospital	<input checked="" type="radio"/> No <input type="radio"/> Yes	
Self-Serve Permissions (Research Only)	Online Purchase Requisitions [?] Online Payroll RF Forms [?] <input type="radio"/> View Only <input checked="" type="radio"/> Not Authorized <input checked="" type="radio"/> Create Requisitions <input type="radio"/> Signing Designee <input type="radio"/> Create and Submit Requisitions	
Comments	<div style="border: 1px solid gray; height: 40px; width: 100%;"></div>	
<input type="button" value="Reset"/> <input type="button" value="Insert"/>		

How do I update authorization privileges?

1. From the roster of account authorizations, click on an account/project link, if available. If the Account / Project number is not provided as a link, but rather is displayed as a number alone, that means that you are not listed as the department head or account owner for that account and have view-only access. Use the help tab feedback form if you have any questions. You may also click on the employee's name to see a full listing of their authorizations, and from there you can click on the account or project to update.

Purchasing Authorizations

[Return to Department Details](#)

LEAD ENTERTAINERS (12345678) ▼

Department Grants Insert Form Help

[View in Excel](#) [View Purchasing Tiers](#) Click on Employee Name or Account/Project Number to Modify Permissions

James K Dean (Emp_ID: 81312)
Lead Entertainers
Authorized Accounts: 1

Account/ Project	Description	Can Purchase	Campus/ Research Max	Hospital Standard Max	Hospital Special Max	Budget Reports
12345678	LEAD ENTERTAINERS	Yes				No

Joe S Dokes (Emp_ID: 73799)
Lead Entertainers
Authorized Accounts: 2

Account/ Project	Description	Can Purchase	Campus/ Research Max	Hospital Standard Max	Hospital Special Max	Budget Reports
12345678	LEAD ENTERTAINERS	Yes	\$5,000.00			Yes

2. Edit the authorization privileges as necessary (see below). For example, James Dean is authorized to purchase with account number 12345678. If you'd also like to authorize him to retrieve the budget reports for this account, click "Yes" for Budget Reports.

Update Form

Account Code LEAD ENTERTAINERS (12345678)

Employee James Dean Emp_ID 81312

Department LEAD ENTERTAINERS

Authorized to Purchase No Yes

Select Maximum Tiers

Campus/Research ▼

Budget Reports

Campus No Yes

Comments

Record Created 04/10/2009 04:03 PM by Clark Gable

Last Updated 04/10/2009 06:10 PM by Clark Gable

Reset

Update

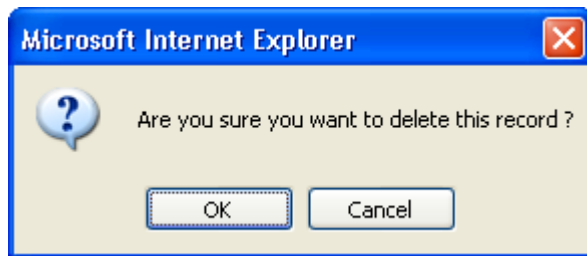
How do I delete an authorization?

1. From the roster of purchase authorizations, click on an account/project link, if available. If the Account / Project number is not provided as a link, but rather is displayed as a number alone, that means that you are not listed as the department head or account owner for that account and have view-only access. Use the help tab feedback form if you have any questions. You may also click on the employee's name to see a full listing of their authorizations, and from there you can click on the account or project to update.
2. At the top of the Update Form, click on the bulleted link called "Delete This Record"
3. You will be prompted with a confirmation box, click "OK" if you indeed wish to delete the record.

Purchasing Authorizations Update Form

[Return to Employee Details](#) | [Purchase Authorizations Home](#) | [All Purchasing Authorizations for James Dean](#)

- [Delete This Record](#)
- [View Audit History for This Record](#)



What if I have questions? Where can I go for help documentation?

1. Click on the Help tab to access the feedback form, as well as this document and a link to the online flash tutorial.
2. Drop the TO: box down to select among a variety of recipients that can receive your feedback by email.
3. Drop the RE: box down to select the type of feedback

Purchasing Authorizations - Help

[Return to Purchase Authorizations Home](#)

Department	Grants	Insert Form	Help
------------	--------	-------------	-------------

Help Documentation and Feedback Form

- [View Tutorial \(Flash\)](#)
- [Questions and Answers](#)

Feedback Form

TO:

RE:

Would you like to be contacted? No Yes