

Columbia University Finance Training

Service Now (FSSA): Completing the Financial Systems Security Application

The Financial Systems Security Application (FSSA) is used by faculty and staff who need to request system access to Columbia University's Financial Systems. This job aid details those steps.

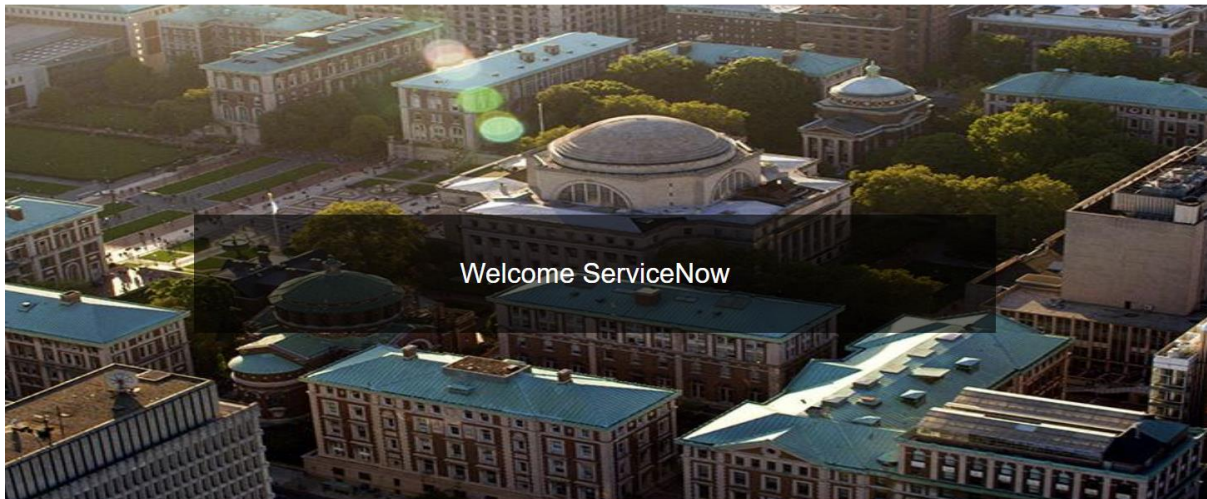
Submitting an FSSA to apply for Financial Systems and Roles

1. Log on to **Service Now** <https://columbia.service-now.com>
2. Click **Catalog** from either the upper right side or the bottom of the ServiceNow Customer Portal Screen.

COLUMBIA UNIVERSITY IN THE CITY OF NEW YORK



Tickets - Approvals **Catalog** - ServiceNow Account



Get Help

Submit an Incident to the Service Desk.



Tickets

Your Incident & Service Request tickets.



Approvals

Your pending & past approval requests.



Catalog

Catalog with requests for various services.



Surveys

Your opportunity to help improve the quality of support provided to the Columbia community.

The Service Catalog screen appears.

[Home](#) > [Service Catalog](#)

Search

Departments

- CUIT
- Finance
- Human Resources
- Get Help

Departments

CUIT

Columbia University Information Technology (CUIT) provides IT services to empower Columbia.

[View Details](#)

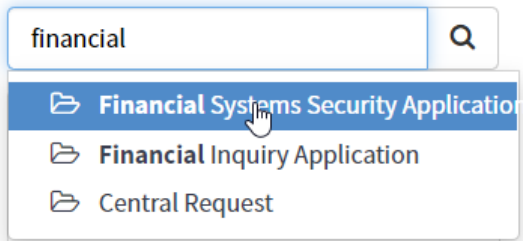
Finance

[View Details](#)

Human Resources

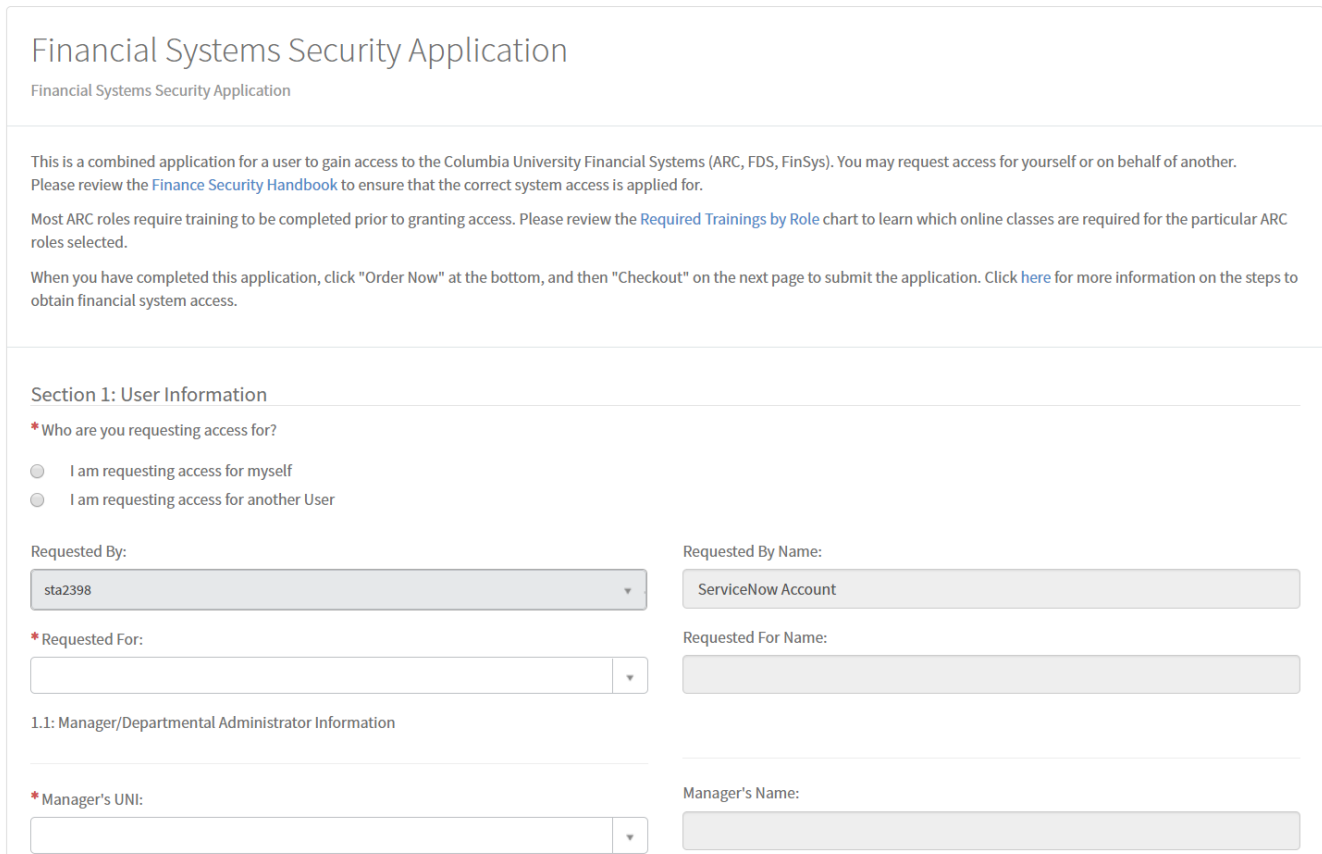
[View Details](#)

3. Type **Financial Systems Security Application** in the **Search** field and click the matching result.



A search input field containing the text "financial" with a magnifying glass icon to its right. Below the input field is a dropdown menu with three items, each preceded by a folder icon: "Financial Systems Security Application" (highlighted in blue), "Financial Inquiry Application", and "Central Request".

The FSSA form appears.



The screenshot shows the "Financial Systems Security Application" form. At the top, it has the title "Financial Systems Security Application" and a subtitle "Financial Systems Security Application". Below this is a paragraph of introductory text: "This is a combined application for a user to gain access to the Columbia University Financial Systems (ARC, FDS, FinSys). You may request access for yourself or on behalf of another. Please review the [Finance Security Handbook](#) to ensure that the correct system access is applied for." This is followed by another paragraph: "Most ARC roles require training to be completed prior to granting access. Please review the [Required Trainings by Role](#) chart to learn which online classes are required for the particular ARC roles selected." A final paragraph states: "When you have completed this application, click 'Order Now' at the bottom, and then 'Checkout' on the next page to submit the application. Click [here](#) for more information on the steps to obtain financial system access." The form is divided into sections. "Section 1: User Information" is the first section, containing a required field "* Who are you requesting access for?" with two radio button options: "I am requesting access for myself" and "I am requesting access for another User". Below this are two columns of fields. The left column has "Requested By:" with a dropdown menu showing "sta2398", and "Requested For:" with an empty dropdown menu. The right column has "Requested By Name:" with a text field containing "ServiceNow Account", and "Requested For Name:" with an empty text field. Below these is a section header "1.1: Manager/Departmental Administrator Information". At the bottom of this section are two more fields: "* Manager's UNI:" with a dropdown menu, and "Manager's Name:" with an empty text field.

4. Complete **Section 1: User Information**. You can submit a request on behalf of another user. If the **Request By** and **Manager UNI** are the same when submitting on behalf of a subordinate, the application will be routed directly to the DAF Administrator for approval. Other information to complete:
- **User Type** - Enter your relationship to the University (If you are a Consultant/Temp or a Columbia Affiliate, you must enter both an Access Begin Date and an Access Expiration Date.)
 - **Access Type** - Enter the type of request
 - **DAF Department** - The School / Admin Unit who is authorized to grant access

5. Complete **Section 2: ARC User Access**. Select the Roles for which you are applying. Any Roles that require training will be indicated. View the required training [here](#).

Section 2: ARC User Access

2.1: Procurement - Requisitions and Vouchers

These roles automatically grant Procurement Inquiry access in ARC. If access to FDS is required, select "ARC Online Reporting Only" under section 2.5.

Roles:

- Requisition Initiator (Requires Training)
- Voucher Initiator (Requires Training)
- Department Requisition Approver (Requires Training)
- Department Voucher Approver (Requires Training)
- TBER Approver (Requires Training)

* Origin (Requester Profile):

FIN -- FIN Finance

2.2: Procurement - Exception Roles

Roles:

- Receiver Only (No other Initiator Roles) (Requires Training)
- Supplemental Voucher Approver (Requires Training)
- Requisition Ad Hoc Approver (Requires Training)
- Voucher Ad Hoc Approver (Requires Training)
- Procurement Inquiry Only

* Inquiry departments for roles selected in section 2.1 and/or section 2.2

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Note: Certain roles will require the completion of additional fields. For example, if you select Requisition Initiator, you will need to indicate the Origin (school / department) and Inquiry departments.

6. If you selected **Yes** for **Is ARC Special Request access required?**, select the desired Roles from **Section 3: ARC Special Requests**.

Is ARC Special Request access required?

Special Requests are types of access needed by only a select group of users, and approved by the Controller's Office. If none of these are required, please do not select access in this section:

- Approval of procurement transactions over \$500,000
- Access to send voucher files from integrating systems
- Bypass the segregations of duties requirements for procurement transactions
- Access to additional accounts for procurement transactions (revenue and balance sheet accounts)
- Approval of ChartField Request forms
- Initiate or approve general journal entries (access to balance sheet accounts)
- Initiate or approve cash transactions for departmental bank accounts
- Initiate grant and/or non-grant recharge center transactions
- Access additional business units
- PS Query reporting access (requires SQL knowledge for senior financial or technical users)

Yes

No

Section 3: ARC Special Requests

3.1: Procurement - High Dollar Approval Thresholds

Roles:

- Department Requisition Approver (Requires Training)
- Department Voucher Approver (Requires Training)
- Travel Advance / Travel & Business Expense (TBER) Approver (Requires Training)

Requisition / Voucher Approver Departments and High Dollar Thresholds Approval Dollar Range (check all that apply):

- \$500,001 - \$1,000,000

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7. Complete **Section 4: FINSYS/FFE User Access** if you are applying for FinSys/FFE Roles. You are required to indicate **department(s)/tree node(s)** for any FinSys/FFE and PAD roles you select.

Budget Tool Inquiry Only
 Budget Tool Initiator (Create / Modify / Delete)
 Budget Tool Preliminary Approver
 Budget Tool Final Approver

* Select the following department(s)/tree node(s) for all FinSys/FFE access, except PAD. If PAD is selected, a separate department selection will open.

4.7: PAD (Payroll Detail Reporting Information)
Note: PAD Initiator role allows user to budget detailed payroll in the payroll module of budget tool. Must also have Budget Tool Initiator. Enter PAD Access for the following department(s) / tree node(s):

Roles:
 PAD (Department) Inquiry Only
 PAD Initiator (Create / Modify / Delete in Budget Tool Payroll module)

* Enter PAD Access for the following department(s) / tree node(s):

8. Enter any **Comments**, select the **User Acceptance** box for the **Terms of Agreement** and click **Submit**.

Section 6: Comments
Comments:

Section 7: Terms of Agreement
* Accept the Terms of Agreement:
Access to the University's financial systems is granted solely in conjunction with assigned duties as an employee /consultant/temporary/affiliate of the University. Owners of a Columbia University logon ID are responsible for all use of the ID and password and must comply with all University policies on security, computer access, and confidentiality of data. Failure to follow these policies will result in the loss of computing privileges. [Click here](#) for Columbia University IT policies.
In addition, if approval authority is requested, transaction approvers must be familiar with the Departmental Authorization Function ("DAF") policy, understand the responsibilities attendant to this authority, and the obligation to maintain sufficient documentation to substantiate any financial activity for internal and external audits and any related inquiries. [Click here](#) for the DAF policy.
By checking the "User Acceptance" button, you acknowledge these policies apply to you or a user for who access has been requested for. Further information regarding these policies is included in the related ARC training courses.

User Acceptance

Submit Add attachments

Required information **1.2: User Type** Select the following department(s)/tree node(s) for all FinSys/FFE access, except PAD. If PAD is selected, a separate department selection will open.
Enter PAD Access for the following department(s) / tree node(s):

The Request Details appears.

Home > Tickets > Request Details

REQ0098537 | Requested Items

RITM0103155 | Financial Systems Security Application

Approved (Approved)
Manager Approval (In progress)
Completed (Pending - has not started)

Financial Systems Security Application

Requested Item

Number: RITM0103155 Task state: Open

Item: Financial Systems Security Appli... Approval: Requested