

NOTE: Regardless of the role selected (Approver or SSB view access), each person listed on the form is required to be set up in the appropriate security role with Banner. Therefore, a *Self-Service Banner (SSB) Authorization Request Form* (<http://controller.cofc.edu/accounting-forms/index.php>) must be completed and processed first, before this form can be processed. If you are unsure whether you are set up in the appropriate finance security role within Banner, please contact Patrick Fillippa (fillippapm@cofc.edu) in the Controller's Office for confirmation.

This form serves as the College's record of authority for processing financial transactions including purchasing, travel, IDT's, transfers, etc. and fulfills audit requirements. It also maintains records of approved view-only access to Banner Finance information. This form supersedes the form previously called the "Signature Authorization Form", and all previously submitted Index/FOP Access Forms.

A form will need to be completed for every Index (Fund, Organization, Program) for which your department has financial responsibility. As the College moves toward more electronic transactions, this form serves as a physical signature authorizing the listed users to make and approve transactions. *This form must be re-submitted in its entirety every time persons are added or removed, so please consider carefully your long-term needs.* If additional names are required, simply attach additional pages. Two signatures are required at the bottom of each page. Without these two signatures, the form will not be processed and will be returned for completion.

On this form, please indicate if this is an Initial Submission or an Update/Change by selecting one of the two check boxes in the upper left-hand corner. If you need a new index, please submit a *Chart of Accounts Maintenance Request Form* (<http://controller.cofc.edu/accountingforms/index.php>) to the Controller's Office for processing.

In order to query indexes in Banner Finance or to authorize journal entries or budget transfers, users will need to have access to Self-Service Banner (SSB) Finance **AND** MyCharleston (Luminis), which is assigned when employed or registered as a student. To gain access to Banner Finance, a completed *Self-Service Banner (SSB) Authorization Request Form* (<http://controller.cofc.edu/accounting-forms/index.php>) must be submitted to the Controller's Office for processing.

If the "Self-Service (SSB) view access" button is marked, it will allow the person to view financial information in Banner Finance, but they cannot approve transactions of any kind. A signature is not required, however, all persons with view-only rights must be listed or their access will be removed.

In order to place purchase orders electronically, users will need to have access to: MyCharleston (Luminis), eProcure (SciQuest), and Self-Service Banner (SSB) Finance. Please indicate on the Index/FOP Access Form which of these services your users require. If users do not already have Banner Finance access, a *Self-Service Banner (SSB) Authorization Request Form* is required.

There are several roles within eProcure: Shoppers, Approvers, and Senior Executive Approvers:

Shoppers will not need to be listed on this form as they do not need any special purchasing permission in either Banner or eProcure. Shoppers are only able to create a shopping cart with their desired purchase and will need to assign the shopping cart to a Requisitioner.

Approvers are able to submit both their own carts and assigned carts for purchase up to their purchasing limit which is established with this form. Each department can choose this limit, not to exceed \$4,999.99 (***A limit must be entered on the form for each approver***). Carts with totals that exceed an Approver's limit must be approved by an Approver with a higher authority.

Only Senior Executive Approvers have the authority to approve any purchase for \$5,000 or more. Our Executive Vice Presidents and Academic Deans serve as Senior Executive Approvers.

NOTE: THIS FORM SUPERSEDES AND REPLACES ALL PREVIOUS INDEX/FOP ACCESS AND/OR SIGNATURE AUTHORIZATION FORMS.

Please forward this form to Patrick M. Fillippa in the Controller's Office when completed.

NOTE: Original signatures required for this form to be valid. Please remit this form to the Controller's Office for processing.

NOTE: This form supersedes and replaces all previous Index/FOP Access (formerly Signature Authorization) forms. Please list all persons who should have access. All others will be removed.

NOTE: This form is data-enterable in all fields, except where a signature is required.

Date: Index: Index name:
 Fund: Effective date: End date (for grants):
 Initial form submission Organization: Chair/Director/Department Head (Print):
 Update/change authorized person(s) Program: Principal Investigator (if different):

Source of funds:
 State Federal Other (please describe): **Note:** If an approver limit is not entered, the default will be \$4,999.99.

Name of Vice President or Academic Dean

Name (printed): CofC email address: Signature: _____
 Self-Service Banner (SSB) view access EA / IDT / JE approver Budget transfer approver eProcure approver Approver Limit (required): \$ *(only required if an APPROVER role is selected):*

Name (printed): CofC email address: Signature: _____
 Self-Service Banner (SSB) view access EA / IDT / JE approver Budget transfer approver eProcure approver Approver Limit (required): \$ *(only required if an APPROVER role is selected):*

Name (printed): CofC email address: Signature: _____
 Self-Service Banner (SSB) view access EA / IDT / JE approver Budget transfer approver eProcure approver Approver Limit (required): \$ *(only required if an APPROVER role is selected):*

Name (printed): CofC email address: Signature: _____
 Self-Service Banner (SSB) view access EA / IDT / JE approver Budget transfer approver eProcure approver Approver Limit (required): \$ *(only required if an APPROVER role is selected):*

Name (printed): CofC email address: Signature: _____
 Self-Service Banner (SSB) view access EA / IDT / JE approver Budget transfer approver eProcure approver Approver Limit (required): \$ *(only required if an APPROVER role is selected):*

Signature (Required): _____ Signature (Required): _____

NOTE: Attach additional pages, if necessary. Two signatures are required on the bottom of all pages.

(Circle): Chair / Director / Department Head
 Or Principal Investigator (for grants and contracts)

(Circle): Executive Vice President / Dean / Designee