

Getting Access to Financial and Administrative Systems and Other Resources

Application/Resource	What is it used for?	How do I request it? <i>Request Method</i>	<i>Navigation</i>
AccuShip	Yale's online shipping solution. Create air bills and track shipments with FedEx, UPS and DHL through third-party services.	START	Access for Myself/Access for Others, AccuShip
AP Worklist	Online tool for business offices to view, process and approve invoices on hold. More info: AP Worklist FAQs	START Department TAC sends email with the following info: * The names and NetIDs of the individuals requiring access * The ores the individuals will need access to. Robert.Bores@yale.edu	Maintain Lists Responsibility
BMS (AS400) - Animal Protocols View	View Animal Protocols information.	YSM System Access Request Form	Complete form and fax to Client Accounts and Access @ 5-3606
BMS (AS400) - Human Resources System	Create, view and maintain HR records (YSM).	1) YSM System Access Request Form 2) Request for Authorization to Human Resources System and On-Line Profiles 3) Yale University School of Medicine Accountability Statement	1) Complete form and fax to Client Accounts and Access @ 5-3606 2) Complete and sign form and send original to: School of Medicine Office of Financial Operations, Suite 216, 47 College Street. 3) Complete form and send original to: School of Medicine Office of Financial Operations, Suite 216, 47 College Street.
BMS (AS400) - ITS Per Person Network Billing	View and modify your departments ITS per person billing.	YSM System Access Request Form	Complete form and fax to Client Accounts and Access @ 5-3606
BMS (AS400) - Merit Increase System	Provides for the electronic submittal of proposed salary increases for the M&P and Faculty population. It utilizes the employee information database in the BMS HR System, which is updated nightly from the University's Oracle HR database.	1) YSM System Access Request Form 2) Request for Authorization to Human Resources System and On-Line Profiles 3) Yale University School of Medicine Accountability Statement	1) Complete form and fax to Client Accounts and Access @ 5-3606 2) Complete and sign form and send original to: School of Medicine Office of Financial Operations, Suite 216, 47 College Street. 3) Complete form and send original to: School of Medicine Office of Financial Operations, Suite 216, 47 College Street.
BMS 2000 - Accounts Receivable System	The accounts receivable system allows YSM departments to enter and track their invoices (both internal and external).	YSM System Access Request Form	Complete form and fax to Client Accounts and Access @ 5-3606
BMS 2000 - BMS Account Lookup Datamart (Brio Reporting)	Reporting from BMS Datamart.	YSM System Access Request Form	Complete form and fax to Client Accounts and Access @ 5-3606
BMS 2000 - Clinical Reporting System, Clinical Reporting System Datamart (Brio Reporting)	Reporting tool for Clinical billing information from IDX.	YSM System Access Request Form	Complete form and fax to Client Accounts and Access @ 5-3606
BMS 2000 - FMT to LD (Make It So)	FMT to LD interface. This application allows the user to feed labor distribution information from FMT into Oracle via the interface housed in BMS 2000. FMT salary workbook access is required.	YSM System Access Request Form FMT Access Request Form	Complete form and fax to ERS Central Administrator, Grants and Contracts Administration @ 2-5837
BMS 2000 - Grant/Contract Proposal & Award System, Grants & Contracts Reporting System, (GPAS)	GPAS is used for looking up detailed information about a specific grant or contracts, such as, looking up one Principal Investigator's (PI) grants and/or contracts. Grants Contracts Reporting System (GAC), another grant and contract reporting system, is commonly used to look at "the big picture", a compilation of data for an entire section or department. For example, you can look up how many National Institutes of Health grants there are within a department.	YSM System Access Request Form	Complete form and fax to Client Accounts and Access @ 5-3606
BMS 2000 - Space Information System Datamart (Brio Reporting), Space Information System	An on-line physical space inventory through the Space Inventory System (SIS). Depending on your authorization, you can update or view room occupant and space functions in Medical School buildings and leased properties. SIS reporting from the Datamart.	YSM System Access Request Form	Complete form and fax to Client Accounts and Access @ 5-3606
BrioQuery	Financial and management reporting from the Data Warehouse.	START	Access for Myself/Access for Others, Oracle Financial Planning (Xtrain, Introduction to BrioQuery-register for course)
C & T, Casual and Student Payroll	Online system for weekly timesheet entries for C&T and Casual/Student payroll.	START	Access for Myself/Access for Others, Oracle Human Resources or Oracle Time Entry (Xtrain, C&T Casual and Student Payroll-register for course)
Casual Employee Setup (YSM)	System used to set up HR records for new casual employee/s.	Send email to: Mildred.Anderson@yale.edu	Include name, NetID and department of the person requesting access.
Computer Services	Request: Email account, new computer setup, remote access dial-in account, centralized file services, backup service, scheduling account, software for Windows or Macintosh, new network circuits for computers or printers, remove device from network, more...	Computing Request Form	Complete form and fax to Client Accounts and Access @ 5-3606
Custom Commitments	Custom Commitments is a web-based tool used to manually generate commitments in the data warehouse for labor, non-labor and revenue activities.	START	Access for Myself/Access for Others, Oracle General Accounting (Xtrain, Custom Commitments-register for course)
Data Warehouse Reporting (DW Portal)	Financial and management reporting from the Data Warehouse.	START	Request Access, Oracle Financial Planning (Xtrain, Data Warehouse Reporting for New Users-register for course)
Departmental Authorizer	Grants the designee rights to authorize departmental expenditures.	START	Maintain Lists
Effort Reporting System (ERS)	ERS is a web-based system used to certify effort for award compliance.	Effort Reporting Access Request *Principles of Effort Reporting and Effort Reporting System training are prerequisites to gaining access.	Complete form and fax to ERS Central Administrator, Grants and Contracts Administration @ 2-5837 *Register for class in TMS
FMT Budgeting & Planning System	An Excel based budgeting and forecasting tool used for annual budget process, quarterly monitoring, salary planning and entering Grants & Contracts budgets.	FMT Access Request Form	Fax completed and signed (by Dept. Administrator) form to: Candice Haslegrave, FMT System Administrator @ 5-5397
FWR Facilities Work Request	Online system for requesting Facilities services.	Access is available to anyone with an active Yale NetID and password.	Go to: FWR-Facilities Work Request , Log in with NetID and password
HIC Protocol (Coeus) Inquiry	View HIC (Human Investigation Committee) Protocol information.	YSM System Access Request Form	Complete form and fax to Client Accounts and Access @ 5-3606
iExpense/Expense Management System (EMS) Purchasing Card and User Request	iExpense/EMS is used to create and submit expense reports for Pcard charges or to reimburse employees of out of pocket business expenses.	EMS Purchasing Card and User Request More Info: EMS FAQ	Complete form and fax to P-card Office at 432-3280

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IRES	Intergrated Research Enterprise Solution - Yale's integrated web-based research administration system designed to track pre-award data, and help administrators involved in sponsored research manage the proposal submission and award process including compliance requirements.	IRES Access Request Form	Department TAC completes form and submits online
ITS Service Account Inquiry	View your department's ITS Services.	YSM System Access Request Form	Complete form and fax to Client Accounts and Access @ 5-3606
ITS Work Order Inquiry	View your department's ITS work orders.	YSM System Access Request Form	Complete form and fax to Client Accounts and Access @ 5-3606
JSA (Journal Staging Area)	Journal Staging Area is the tool used to create accounting transactions (journal entries).	START *For access to grants: Allowability of Costs and Cost Transfer Principles Training is a prerequisite.	Access for Myself/Access for Others, Oracle General Accounting (Xtrain, Journal Entry/Staging Area-register for course) *Register for this class in TMS
Key Coordinator System	Used to request keys to Yale buildings & facilities.	YSM System Access Request Form	Complete form and fax to Client Accounts and Access @ 5-3606
LD (Labor Distribution)	Includes use of LD for changing labor schedules and for entering retroactive distribution adjustments.	START *For access to grants: Allowability of Costs and Cost Transfer Principles Training is a prerequisite.	Access for Myself/Access for Others, Oracle General Accounting (Xtrain, Labor Distribution (LD)-register for course) *Register for this class in TMS
Moveable Equipment Inventory - available through Oracle, YUGL MEI General User	View and report on Moveable Equipment Inventory information.	Send email to: mei.admin@yale.edu	
My Time (Kronos)	My Time (Kronos) is Yale's online timekeeping system for staff members to keep track of their hours worked and paid time off balances.	Send email to: patricia.dacunto@yale.edu	Email for Business Office access and reporting capabilities. Changes to supervisors and designated approvers can be made in BMS/AS 400.
NetID and Password Help	University NetID and password information and related links	Yale University NetID Information	See Related Links for password help
Procurement Inquiry	Application used to check the status of vendors set-up, purchase requisitions, purchase orders (POs), & invoices; including check requests & employee reimbursements.	START	Access for Myself/Access for Others, Oracle Procurement (Xtrain, Procurement Inquiry-register)
RIF (Receipts Identification Form)	Online Receipt Identification Form to record receipt of cash and checks.	START	Access for Myself/Access for Others, Oracle General Accounting (Xtrain, Receipts Identification Form-Cash Receipts Handling (RIF)-register for course)
SciQuest	SciQuest is a web-based electronic requisitioning tool with catalogs designed to create purchase requisitions.	START	Access for Myself/Access for Others, SciQuest Access
STARS for Hiring Managers	Strategic Talent Management and Recruitment System (STARS) is Yale's online job posting and recruitment system which streamlines the recruitment and hiring process for both the job applicant and hiring manager.	START	Access for Myself/Access for Others, Oracle Human Resources or Oracle Time Entry (Xtrain, STARS Training for Hiring Managers-register for course)
START Authorizer	START Access for Others and START Services for Departments responsibilities (required to approve Accounts Payable and Purchasing transactions as well as Vendor Setups and Telecomm and ITS services).	START	Maintain Lists Responsibility
Telephone Services	Request calling cards, cell phones, pagers, TANS (toll authorization number), and telephone sets and lines.	START	Access for Myself/Access for Others, Telephone Services
TMS MyOrgs (Brio Reporting)	Allows ad hoc reporting from the TMS system.	YSM System Access Request Form	Complete form and fax to Client Accounts and Access @ 5-3606
TMS MyOrgs (Training Management System)	TMS manages information related to required training and forms for University faculty and staff. TMS helps educate the Yale community about required training and forms, facilitates online training registration, and ensures training completion.	Send email to: tmsadm@yale.edu	
View HR Records with Salaries (Medical)	This responsibility allows the user to access employee records, the assignment, and address screens. Elements and salaries are viewable with this responsibility. Also Data Warehouse access is made available.	START	Access for Myself/Access for Others, Oracle Human Resources or Oracle Time Entry (Xtrain, View HR Records with Salaries Responsibilities MEDICAL-register)
View POAP Information Restricted by Organization	Application used to access PO/AP (purchase order/accounts payable) datasets in the Data Warehouse with restrictions based upon the organization access.	START	Access for Myself/Access for Others, Oracle Procurement (Xtrain, View POAP Information Restricted by Organization (Responsibility Only)-register)
VIP Number Requests and Assignments	Create and manage VIP numbers for communicating the PTAEO charging instructions to University-wide contract vendors.	START	Access for Myself/Access for Others, Oracle Procurement (Xtrain, VIP Number Requests and Assignments-register for course)
Web Invoice Payment (WIP)	Web based self-service Procurement application that allows authorized departmental users to enter OK-to-Pay invoices that are \$5000 or less into the system and authorize payment. Approved invoices are imported into the Accounts Payable system daily.	START	Access for Myself/Access for Others, Oracle Procurement (Xtrain, Web Invoice Payment (WIP)-register for course)
WebXtender-DocX	View Financial Operations document imaging, also Grants & Contracts information.	WebXtender Security Request Form	Complete form and fax it to the corresponding Application Owner