



**ST. JOHN'S**  
**UNIVERSITY**

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# **Office of Business Affairs**

**User Access Request and  
Instruction Guides for UIS**

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# Quick Reference Guide

Please reference the guide below to determine which department you need to contact in order to expedite your request. A list of [contact names](#) for each department can be found on the next page.

Information Technology	Business Affairs - Budgeting	Business Affairs - Accounts payable	Business Affairs - Purchasing
<ul style="list-style-type: none"><li>• <b>Access Requests</b><ul style="list-style-type: none"><li>• User ID</li><li>• Check requisition link</li><li>• Purchase requisition link</li></ul></li></ul>	<ul style="list-style-type: none"><li>• <b>Access Requests</b><ul style="list-style-type: none"><li>• Finance Tab</li><li>• Budget Transfers</li><li>• Budget Queries</li><li>• Budget Development</li><li>• P&amp;D Approvers</li><li>• Check Requisition Approvers</li><li>• Budget Administrator List</li></ul></li><li>• <b>Instructions on Navigating</b><ul style="list-style-type: none"><li>• Budget Transfers</li><li>• Budget Queries</li><li>• Budget Development</li></ul></li></ul>	<ul style="list-style-type: none"><li>• <b>Instructions on Navigating</b><ul style="list-style-type: none"><li>• Check Requisition system</li><li>• GERS (T&amp;E)</li></ul></li></ul>	<ul style="list-style-type: none"><li>• <b>Instructions on Navigating</b><ul style="list-style-type: none"><li>• Purchase Requisition system</li></ul></li></ul>

# Quick Contact Guide

## Budgeting Department

**Maria Handler**  
Manager of Budgets  
krpfm@stjohns.edu  
x6786

**Victoria Balkon**  
Senior Budget Analyst  
colev@stjohns.edu  
x1512

**Martha Simone**  
Office Manager  
simonem1@stjohns.edu  
x1510

## Accounts Payable Department

**James Abbatello**  
Assistant Controller  
abbatelj@stjohns.edu  
x8028

**Elionora Ustaev**  
Accounts Payable Director  
ustaeve@stjohns.edu  
x5801

**Joyce Ringuette**  
Accounts Payable Clerk  
ringuetj@stjohns.edu  
x5048

**Maryanne Miccio**  
Accounts Payable Clerk  
micciom@stjohns.edu  
x5759

## Purchasing Department

**Jeffrey Weiss**  
Purchasing Director  
weissj@stjohns.edu  
x6357

**Donna Deans**  
Senior Buyer  
deansd@stjohns.edu  
x6372

**Lorraine Schender**  
Senior Buyer  
schendel@stjohns.edu  
x6196

## User ID

Any employee who wishes to have access to the Business Affairs links via UIS (check req, budget transfers, queries, etc.) **must first have a valid USER ID** established by Information Technology. A typical user id begins with the first letter of the employee's name, followed by the first 7 letters of the last name. Please make sure that a valid user id is set up before requesting access to any of the Business Affairs links. Please contact Information Technology for any questions concerning the [IT account request form](#).

## Finance Tab

Access to the Finance tab is handled by the [Budgeting department](#) within Business Affairs. Any employee that needs access to the Finance tab must email the request to either Martha Simone at [simonem1@stjohns.edu](mailto:simonem1@stjohns.edu) or Victoria Balkon at [colev@stjohns.edu](mailto:colev@stjohns.edu). The request must include the employee's user id, full name, and Xnumber. The Finance tab cannot be granted unless the employee has a valid user id.

## Budget Transfers and Budget Queries

Access to Budget Transfers and Budget Queries is handled by the [Budgeting department](#) within Business Affairs. The [Budget Transfer and Query Request Form](#) can be filled out and emailed to either Martha Simone at [simone1m@stjohns.edu](mailto:simone1m@stjohns.edu) or Victoria Balkon at [colev@stjohns.edu](mailto:colev@stjohns.edu).

With help on navigating through budget queries or transfers, please contact Martha Simone at x1510 or Victoria Balkon at x1512 or view the [Budget Transfer Manual](#) or [Budget Query Manual](#).

## Budget Development

Budget Development is a yearly process that usually starts in October. There are only a select number of employees that have access to budget development and emails will be sent out every September by Victoria Balkon to confirm access.

View instructions for [Annual Budget Development Process](#). Please note that these instructions are updated once a year. If you need a new set of instructions or help on navigating through the budget development system please contact Victoria Balkon at [colev@stjohns.edu](mailto:colev@stjohns.edu) or a x1512.

## Budget Administrator List

The Budget Administrator list is controlled by the [Budgeting department](#) within Business Affairs. Each organization number can designate a certain number of budget administrators who are authorized to expend budget money. By University policy, only administrators (as opposed to staff) are allowed to become a budget administrator. In order to approve check requisitions, purchase requisitions or P&D work orders you must be a designated budget administrator for your org. You **do not** need to be a

budget administrator in order to **process** budget transfers, budget queries, check requisitions, T&E's, purchase orders, and P&D orders.

Any changes to the budget administrator list must be submitted to Martha Simone at x1510 or [simonem1@stjohns.edu](mailto:simonem1@stjohns.edu). A list of actual signatures is kept on file for all budget administrators. Please send the budget administrator's signature to Martha Simone (Newman Hall Room 204) on a blank piece of paper. Please make sure that it is a blank piece of white paper (with no lines) and no other writing.

# Check Requisitions

## Check requisition link

Access to the check requisition link within the Finance tab is handled by Information Technology. Please fill out an [IT Account Request Form](#) and within the comments section indicate that access is needed for the check requisition link.

## Check requisition approvals

Only authorized [budget administrators](#) are allowed to approve check requisitions. Please see the [budget administrator](#) section for more information. Access to check requisition approval is handled by Martha Simone in the [Budgeting department](#).

Approvers can be categorized at levels 1 through 7. Whoever is designated at level 1 will get an email when the check requisition is submitted. An email will also be sent to the Budget Administrator that is chosen from the drop-down during the check requisition process. All other levels will not get an email, however they can log into UIS at anytime to approve any check requisitions in their approval queue. Anyone at level 2 through 7 that approves a check requisition will automatically generate an email that states they approved the check requisition on behalf of the person designated at level 1.

When requesting access to check requisition approval, please email Martha Simone with the user's Banner ID, the orgs they need access to, and the level at which they should be designated. Please note that two people cannot be designated at the same level. If you need to know that current levels for a specific org please contact Martha. If Martha is unavailable please contact Victoria Balkon.

**Please note: Only approver access is handled by Budgeting. If you need access to input a check requisition, you need to fill out an IT account request to get access to the [check requisition link](#). If you need help navigating the system, please contact [Accounts Payable](#).**

## Check requisition navigation

With help on navigating through the check requisition system, please contact the [Accounts Payable](#) department or view our [Check Requisition Manual](#).

# Purchase Requisitions

## Purchase requisition link

Access to the purchase requisition link within the Finance tab is handled by Information Technology. Please fill out an [IT Account Request Form](#) and within the comments section indicate that access is needed for the purchase requisition link.

## Purchase requisition approvals

Only authorized [budget administrators](#) are allowed to approve purchase requisitions. Please see the [budget administrator](#) section for more information. Access to purchase requisition approval is handled by Martha Simone in the [Budgeting department](#) and mirrors check requisition access. Approvers will have the same access to both systems.

**Please note: Only approver access is handled by Budgeting. If you need access to input a purchase requisition, you need to fill out an IT account request to get access to the [purchase requisition link](#). If you need help navigating the system, please contact [Purchasing](#).**

## Purchase requisition navigation

With help on navigating through the purchase requisition system, please contact Donna Deans in the Purchasing department at x6372 or [deansd@stjohns.edu](mailto:deansd@stjohns.edu) or view the [Online Purchasing User Reference Manual](#).