

Administrator Financial On boarding Checklist

I. Request via Senior Budget Manager

1. AP Workflow (Add Employee & other access)
2. IBUY – NYU; Fiscal Officer must email Finance Link user role

II. Request system access/ account access:

1. Administrative Dashboard – Email: askits@nyu.edu
2. Chartfield Access – Log in to NYU Home -> Work -> Additional Services -> [Chartfield Access Authorization Form](#)
3. UPS Account: <http://www.nyu.edu/employees/resources-and-services/administrative-services/mail-services.html>
4. Complete ACH enrollment for AP Payments: http://www.nyu.edu/content/dam/nyu/financialOperationsTreas/documents/forms/Direct_Deposit_Authorization_AP.pdf

III. Request payment cards: Applications should be given to Assoc. Director of Administration – diane.bennett@nyu.edu

1. CTA - http://www.nyu.edu/content/dam/nyu/financialOperationsTreas/documents/forms/CTA_Application.pdf
2. Purchasing Card – (Pcard) - http://www.nyu.edu/content/dam/nyu/financialOperationsTreas/documents/forms/PCard_Application_US.pdf
3. Corporate travel card (Amex) (If approved by dept Head) - http://www.nyu.edu/content/dam/nyu/financialOperationsTreas/documents/forms/CTA_Application.pdf

IV. I-Learn Courses

Required Courses:

1. FIN 001: The Fundamentals of Business Expenses
2. FIN 002: All About Business Travel
3. FIN 003: All About AP Workflow
4. FIN 005: AP Workflow Real Life Examples

5. FIN 210: Global Payment Card (GRAM) System
6. FIN 800: UDW+ Finance Dashboards Online Training
 - a. FIN 804: UDW+ Access to All Financial Dashboards and Standard Reports Quiz

Recommended Courses:

7. FIN 106: Journal Entry Management System (JEMS) Users' Guide
8. FIN 108: Chart of Accounts (WSQ)
9. FIN 207: Budgeting Basics

V. ISAW Website: Financial Resources – Review & familiarize yourself with policies & procedures of ISAW & NYU - <https://isaw.nyu.edu/guide/finance>

VI. NYU Resources: Read & familiarize yourself with this section

1. NYU Finance Link: <http://www.nyu.edu/employees/resources-and-services/financelink/buying-paying/paying-for-travel.html>

NYU Contacts:

Finance Link: askfinancelink@nyu.edu
212.998.1111

Human Resources: askpeoplelink@nyu.edu
212.992.LINK(5465)

ITS: askits@nyu.edu
212.998.3333

Helpful Bookmarks:

- [ISAW Website](#)
- [NYU Home](#)
- [IBUY – NYU](#)
- [UDW+](#)
- [UPS Campus Ship](#)
- [NYU Financial Forms](#)