JOB AID

Guide to SIS for Fiscal Officers

April 18, 2025

Guide to SIS for Fiscal Officers

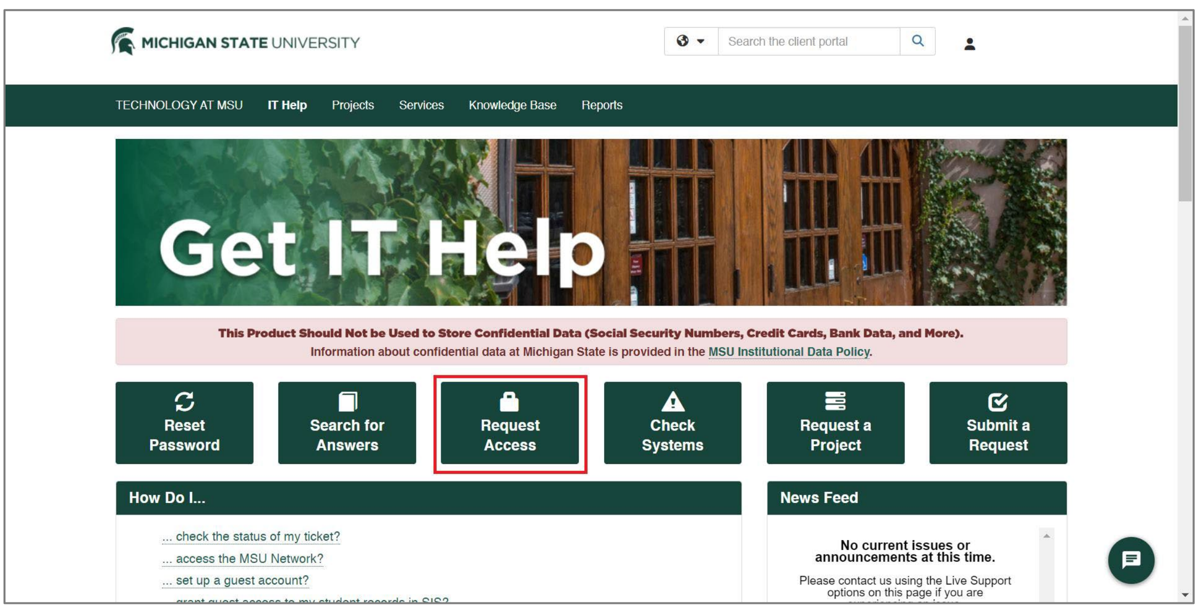
Overview

This guide provides an overview of how to use SIS Campus Solutions to reconcile transactions in SSB (Student System Billing) edocs.

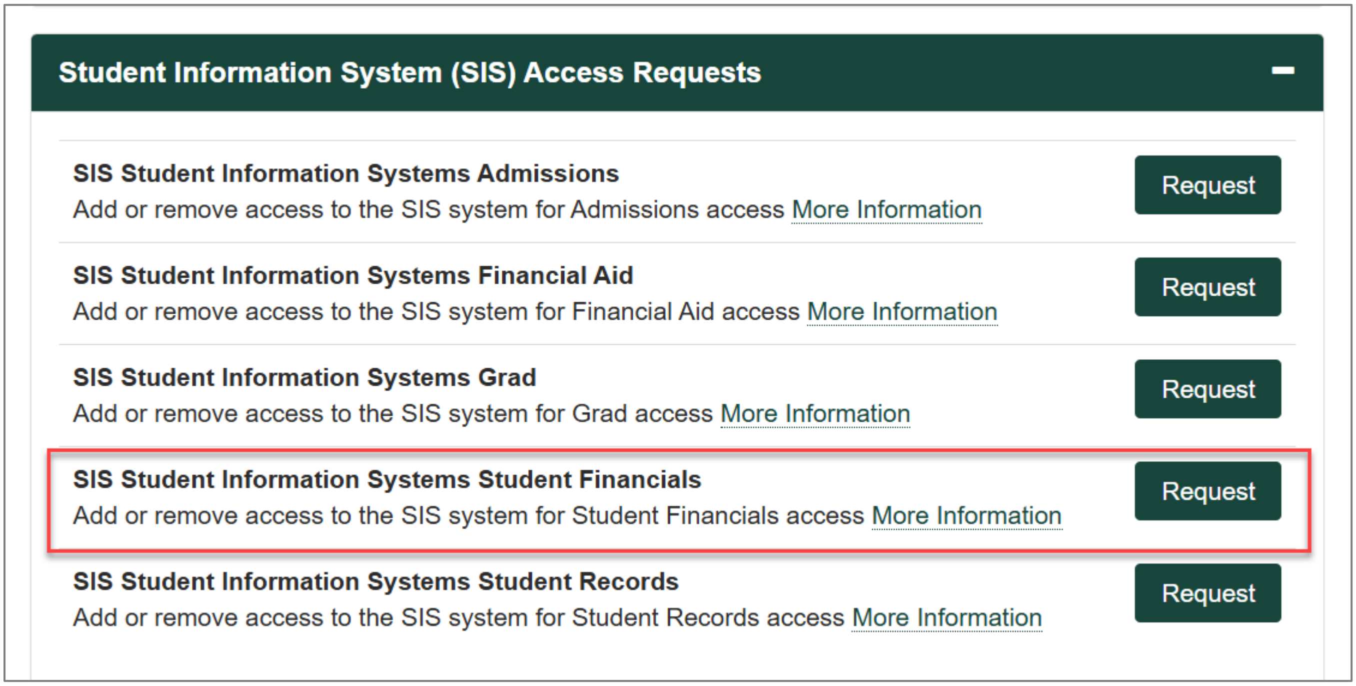
Topics Included:

Requesting Access

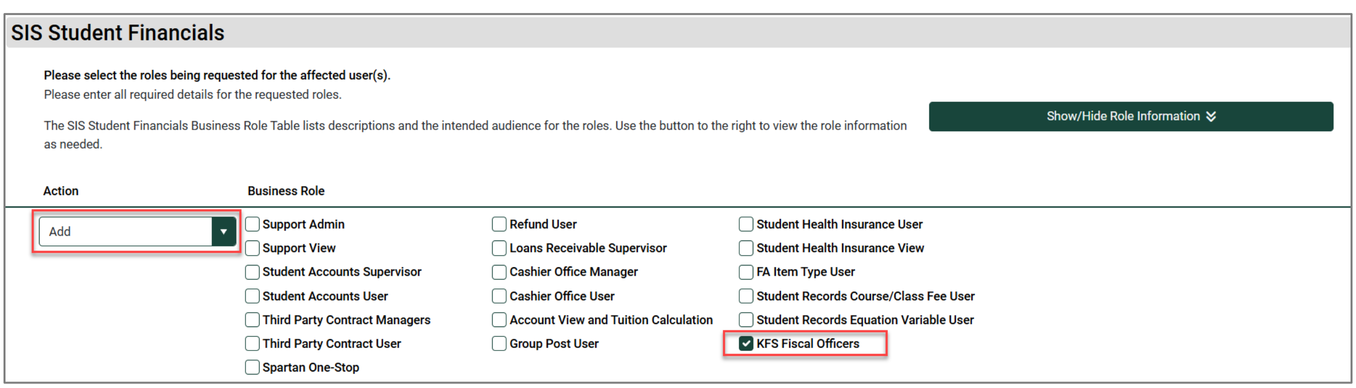
1. Visit the IT Help self-service portal at ithelp.msu.edu
2. Select the “Request Access” tile from the homepage



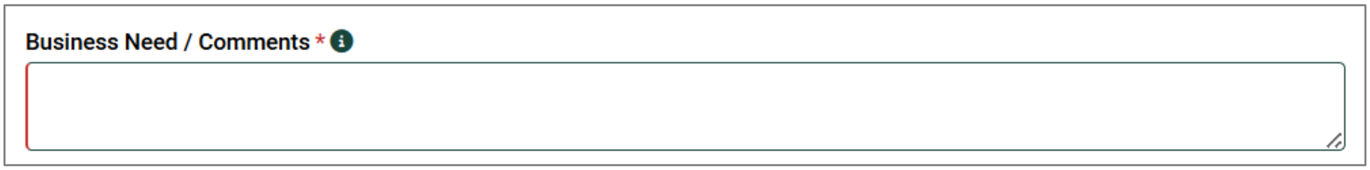
3. After expanding the Student Information System (SIS) Access Requests section, select SIS Student Information System Student Financials by clicking “Request”. A new browser window will open



4. If prompted, enter your MSU NetID login information to access the form
5. Select the green button "Show/Hide Instructions on Overriding a Default Organization" and review the instructions
6. To add the individual users requesting access (either yourself or someone else)
    a. In the "Search for Users" box, search for a user by name or NetID; click "Search"
    b. Select the appropriate user from the drop-down menu; if it is a common name like John Smith, there may be multiple users in the search results
    c. Select the green box with arrows (>>) to move the selected name to the box on the right
7. After adding the user information, select an option from the "Action" drop-down menu. Depending on the form, these options will vary
    a. If "Add" or "Remove" is chosen, select the business role(s) you will be adding or removing for the user
    b. More than one business role can be selected at a time (*reminder: if submitting a request for multiple users, their access being requested must be identical*)
8. Check the box for the role, **KFS Fiscal Officers**

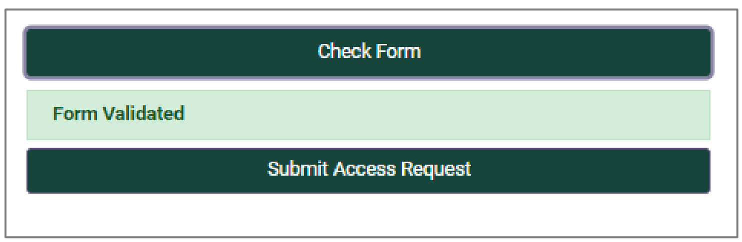


9. Enter the business need for the requested access



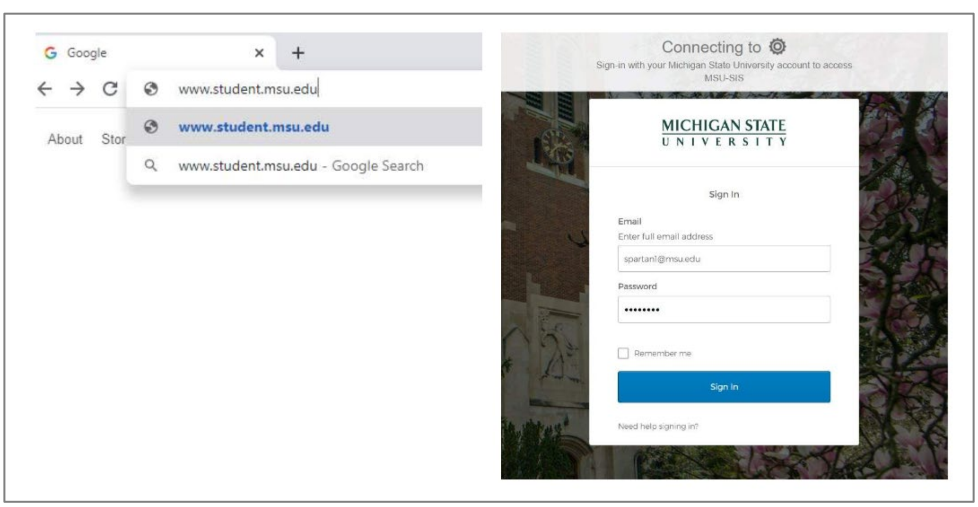
10. Finally, select “Check Form”
    a. The form will flag any areas where information was not appropriately filled out or where information is missing
    b. You will not be able to submit the request until the form is complete and passes this validation process

11. When the form check is complete, select “Submit Access Request”
    a. Your access request will be routed to the appropriate team for approvals
    b. You will receive an automatic email from MSU IT confirming that your access request has been submitted
    c. You will then receive separate confirmation email messages – one to confirm the access has been requested; one to confirm the request has been approved, and one that confirms the access has been granted

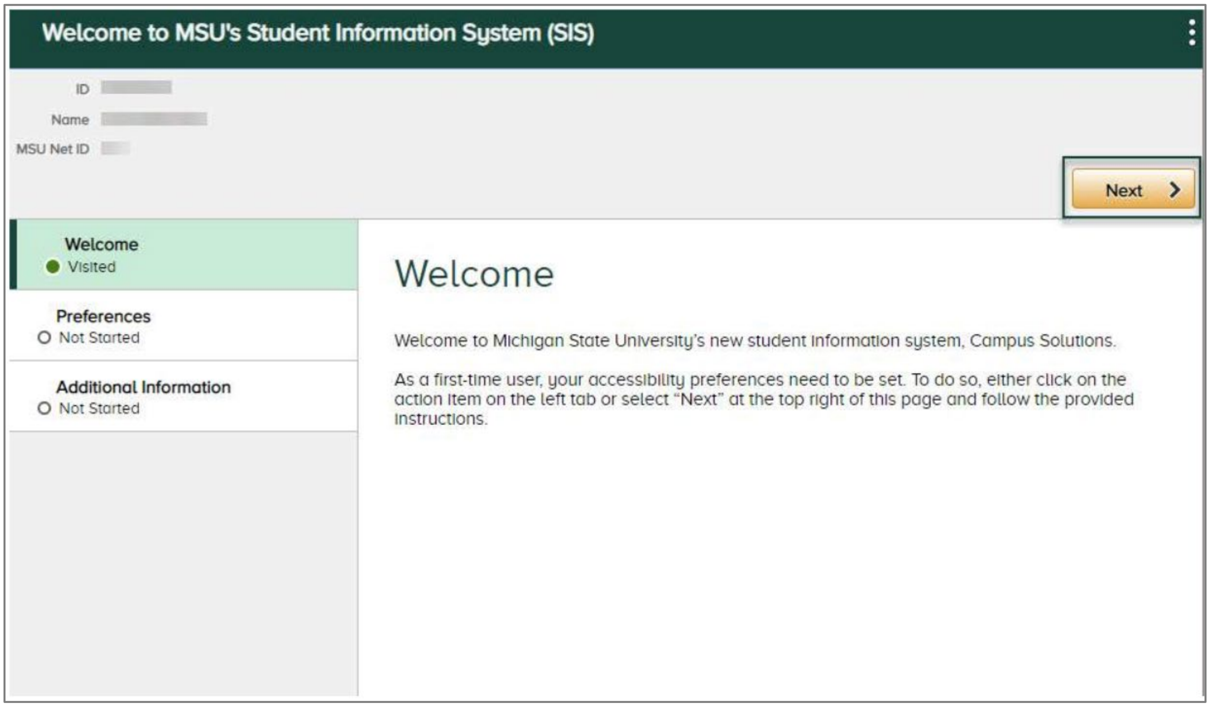


Logging In

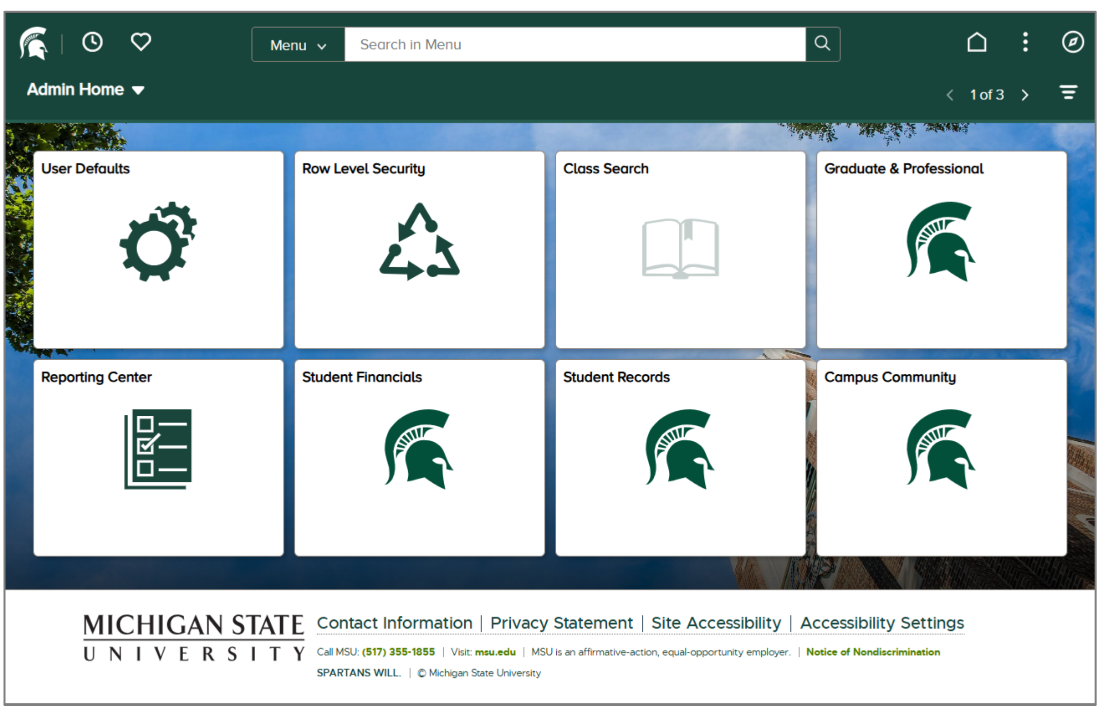
1. Enter student.msu.edu into any browser, sign in using your NetID and password, followed by multi-factor authentication



2. If this is your first time logging in to student.msu.edu, you will be prompted to set your accessibility preferences



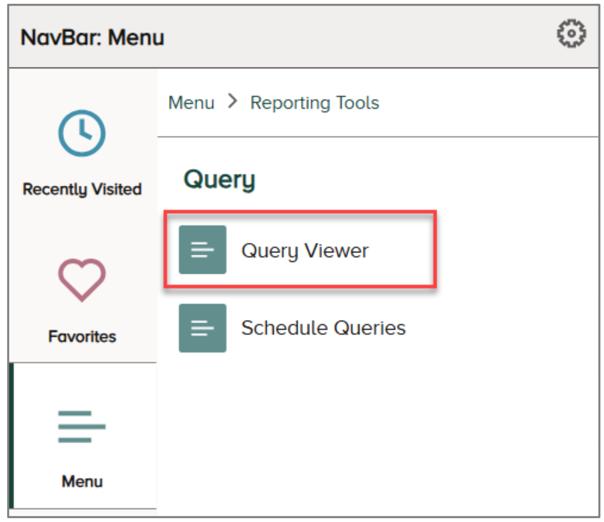
3. Once you've set your accessibility preferences, you'll be taken to the Home page



Navigating

Click on the compass icon in the upper right corner of the page, then follow the navigation below:

Menu > Reporting Tools > Query > Query Viewer

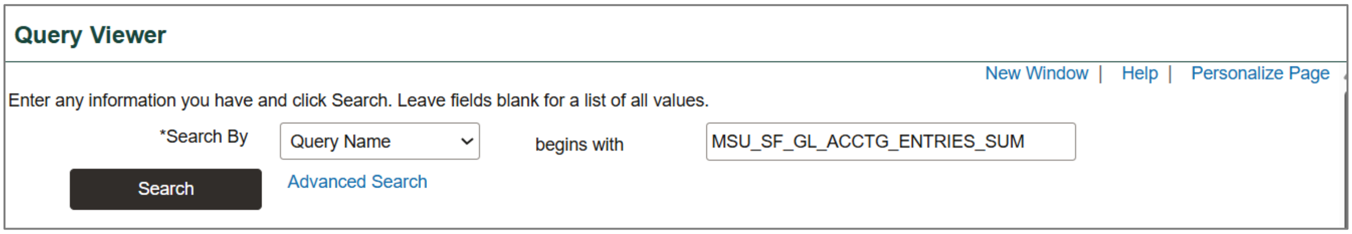


Query Names

QUERY NAME	DESCRIPTION/PURPOSE	PROMPTS
MSU_SF_GL_ACCTG_ENTRIES_SUM	A summary by account for an individual process run date. • Drills down on the **Acct** column to show object code detail for all transactions for that account • Drills down on the **Sum Amount** column to show all individual transaction detail for that account	Org Doc # Run Date (opt) Account (opt)
MSU_SF_GL_ACCTG_ENTRIES_DTL	Individual transaction detail **Note**: This query can be run directly without running the SUM query first. All prompts listed in the next column are required.	Org Doc # Account Object Code
MSU_SF_GL_ACCTG_ENTRIES_DTL2	A summary by account and object code for an individual process run date. • Drills down on the **Sum Amount** column to show all individual transaction detail for that account **Note**: This query can be run directly without running the SUM query first. All prompts listed in the next column are required.	Org Doc # Account
MSU_SF_GL_ACCTG_ENTRIES_DTL3	Individual transaction detail by account and object **Note**: This query can be run directly without running the SUM query first. All prompts listed in the next column are required.	Org Doc # Account

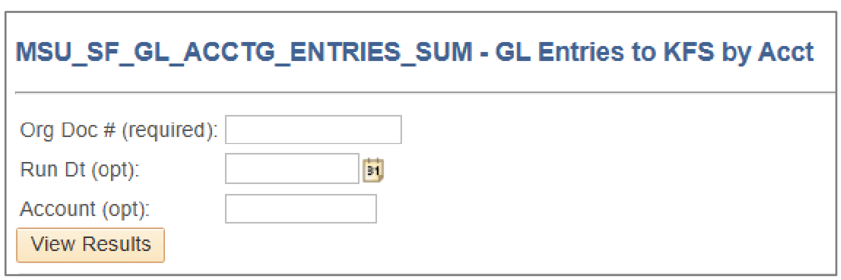
Running Queries

1. Once you've selected a query to run, type its name into the Search box, then click Search



2. Select a format by clicking on the blue hyperlink for HTML or Excel
    a. HTML will present the results in your web browser (and will give the option to Download the results to Excel once it's been run)
    b. Excel will run the results directly into an Excel spreadsheet

3. Enter values in the required prompts (optional prompts are indicated by "(opt)")

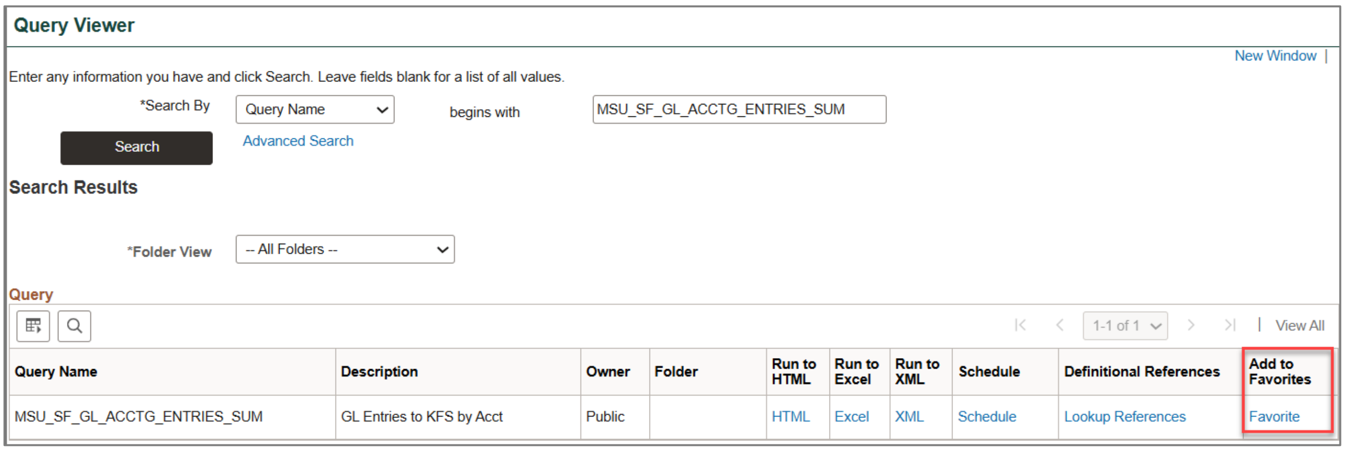


    a. Org Doc # - this value comes from the Document Overview section at the top of the edoc

4. Once all required prompt values have been entered, click View Results to see all transactions associated with that edoc

Adding Queries to Favorites

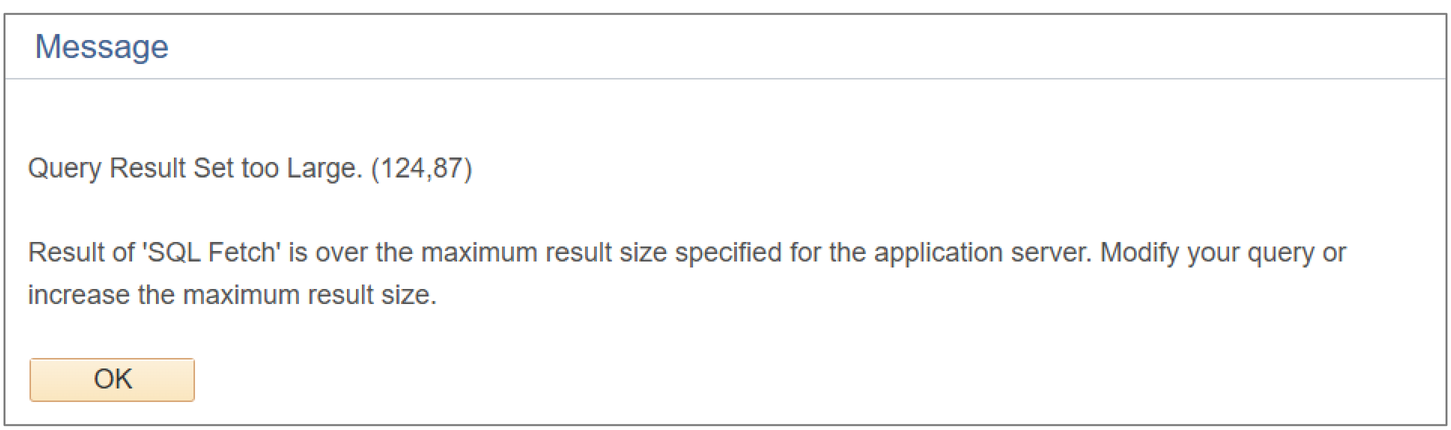
1. Query Viewer allows users to save frequently used queries to your list of favorites to reduce time spent searching for them. First, search for the query you would like to add to your list of favorites. Enter all or part of the query name and then select the Search button
2. Locate your query in the Search Results and click the Favorites link



3. A new section called My Favorite Queries will appear at the bottom of the Query Viewer page that contains your favorite queries

Scheduling Queries

Query Viewer has an internal limit on the amount of data the query will return. If the query results are too numerous and that internal limit is exceeded, a message like this will be returned along with the query results that are displayed:



When this message is received, the query did not return all the results that meet the query criteria, and those results should not be used as is.

There are two options to obtain the query results:

1. Further narrow the query results by utilizing the prompts (if available) and re-run the query.
2. Schedule the query, which sets the query to run in the background and returns the entire results to you when ready. Instructions for Scheduling a query may be found here: https://sis.msu.edu/_assets/documents/reporting/how-to-schedule-a-query.pdf