**Notes on Setting up a New Finance Department Workstation**

**Updated 10-29-2015**

Finance Programs/Add Ins:

* Access to Microsoft Dynamics GP 2015 (including desktop shortcut)
* Access to Integration Manager 14 (ensure the following integrations are available: 1-Gifts-GP-VENDOR, 2-Gifts-GP-PAYABLE, Bradley IMS Journal Entries Import)
* Access to Management Reporter 2012
* Access to Intelliforms (including desktop shortcut)
* Access to Private I (including desktop shortcut)
* Access to GIFTS (including desktop shortcut)
* Access to Papervision (including desktop shortcut)
* Access to Inmagic
* Adobe Acrobat XI
* Microsoft Visio 2013
* Microsoft Excel SAVETODB Add In
* Datamart drives mapped: ETL Landing ([\\SQL-DW-PROD)(M:)](file:///\\SQL-DW-PROD)(M:)) (if applicable), DW Data Connection Share (\\SQL-DW-DEV)(Q:), and DW Data Connection Share PROD (\\SQL-DW-PROD)(R:)
* Internet Explorer settings changed to settings that work with custodian website. See attached screen prints.

Finance Users to Install on their own:

* Additional (non-IE) internet browsers, as needed for compatibility with investment portals and CTRAC website
* Drivers for Digital Check scanner (if applicable)

Additional Finance New User Items:

* User network account needs to be assigned to a datamart Active Directory User Group. Reference SysLogic Finance Data Mart Support Supplement, page 5. Appears that Users have access to Q:, Power Users have access to M:, Q:, and R:
* Access to datamart reporting website
* User name and password set up for GIFTS
* User name and password set up for Microsoft Dynamics GP
* User name and password set up for Intelliconnect/Intelliforms
* Assess whether user should have access to BNY Mellon Connect
* Assess whether user should have access to Wells Fargo CEO

Additional Notes on General Workstation Set Up:

* Ensure that Novatime shortcut is installed on desktop (issue 11/2014, 10/2015)
* Ensure that printer drivers are installed for Finance printer, Copy Room printer and Laura printer (issue 11/2014)
* Ensure that Cisco Call Connector is set up (including desktop shortcut)

Additional Notes on General New User Set Up:

* Add to global e-mail address groups
* Add e-mail to scanner/fax machines