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| **RESEARCH OFFICE**  ***OFFICE OF RESEARCH & INNOVATION*** | |  | **Number:** ORI 02.1 |
| **Issuing Department:**  Office of Research & Innovation |
| **Title: Secure Folder Creation for JP Morgan Chase Quick Pay** | | | **Submitted By:**  Jennifer Reed-Hack, Assoc. Director of Finance, ORI |
| **Supersedes:** Not Applicable | | | **Approved By:**  Lauren Geary, Director, Finance & Administration, ORI, VP of Finance |
| **Effective Date:** February 15, 2023 | **Last Reviewed:** | | **Next Review**:  February 15, 2023 |

1. **Background and Purpose**

Drexel Security in review of J.P. Morgan’s internal design and security decided that the best practice to keep our participant Quick Pay information secure is by utilizing a Secure Folder, hosted in [**\\Files.drexel.edu\projects\Research Payments\**](file:///\\Files.drexel.edu\projects\Research%20Payments\)**.**

**II. Where will the Secure Folders be?**

The folders for Quick Pay files will be housed under Research Payments. You will need access to the secure path noted above in order to gain access to all folders, within Research Payments.

**Who can obtain access to the Secure Folders?**

Only specific ORI personnel have access to all secure folders housed under Research Payments. The ORI personnel will be the only ones who will be able to upload the payment file/s to Quick Pay. Currently, the ORI staff that have access are: Jennifer Reed-Hack, Assoc. Director of Finance, ORI, Jeannine Reed-Heil, Finance Coordinator, ORI and Sharesse Jackson, Talent & Operations Coordinator, ORI.

**What do I need to get a New Secure Folder created?**

To get a New Secure Folder Created you will receive a completed Request to use Quick Pay Form.



You will review the form and make sure that the # of people they are requesting to have access to the secure folder is minimal, usually only the PI, coordinator and someone else from their department. If there are more than that just confirm with the submitter of the form that all the personnel they noted will be working with paying the participants. If the PI is not noted in the section to have access to the folder confirm with the PI that they should or should not have access.

**III: How do I get a New Secure Folder Created?**

Once you have the completed form email [Accounts@Drexel.edu](mailto:Accounts@Drexel.edu), this is the IT Department.

Subject Line: New Secure Folder Under Research Payments

Body of Email: Good Afternoon, can you please set up a new secure folder for me under

Research Payments, [**\\Files.drexel.edu\projects\Research Payments\**](file:///\\Files.drexel.edu\projects\Research%20Payments\)**.** The information is as

follows:

**Name of Secure Folder:** (this is the Format) PI Last Name\_Protocol #

**People who need access to the folder**: Names and Emails Only

**Always put**: Jennifer Reed-Hack Email: [jr3275@drexel.edu](mailto:jr3275@drexel.edu)

Jeannine Reed-Heil Email: [jr3724@drexel.edu](mailto:jr3724@drexel.edu)

Sharesse Jackson Email: [sdj68@drexel.edu](mailto:sdj68@drexel.edu)

Then add the names and emails of those noted on the Request Form to have access.

Send the Email.

**Will I receive notification that my email was sent?**

You will receive an email notification from Drexel IT that they received your request and

will get back to you. The email will detail the information you noted in your email.

**Let Requestor Know:**

Email the person who emailed you the form back and inform them that you requested a

New Secure Folder to be set up for their study and as soon as it is complete you will let

them know.

**IV: How long does it take for the Folder to be set up?**

Usually, the creation of the folder only takes a day or two. If you do not hear back from Drexel,

IT within 2 days go to the original email you sent and resend to [Accounts@Drexel.edu](mailto:Accounts@Drexel.edu) asking

when you can expect the folder to be set up.

**How will I know the new folder I requested is set up?**

You will receive an email from Drexel IT informing you that the folder is set up and it will

detail what you noted in the body of your email.

**V: The New Secure Folder is Set up now what do I do?**

Check and make sure you see the new folder under Research Payments. Then you

will email the person who requested the new folder and inform them that their new secure

folder is set up and the name of the secure folder, PI Name\_Protocol # (Actual).

Tell them to confirm they can access the folder and as well as those who were to have access to is as well, that were noted on the form.

**Note this in email**: Please confirm that you have access to your new secure folder. Restart your computer, connect to the VPN and then follow the below instructions dependent on what type of computer you are working on. These instructions are also in the User’s Guide.

A. Connect to Drexel VPN

If you have not connected to VPN before, please follow the steps detailed [here](https://drexel.edu/it/help/a-z/VPN/).

B. For Mac Users:

* 1. Access: **Finder**
  2. Select: **Go** 🡪 **Connect to Server**
  3. In the address field of the Connect to Server dialog, type the URL using this syntax:  
     **smb://files.drexel.edu/projects**
  4. Click: **Connect**
  5. Select: **Registered User**
  6. For name enter your **Drexel account email**: [abc123@drexel.edu](mailto:abc123@drexel.edu)
  7. For password: enter your **Drexel password**
  8. Click: **Connect**
  9. A folder should appear on your Desktop with your study’s PI Name and IRB Protocol number (as entered in the application form)
  10. This is the folder where you or your staff will be uploading the Payment Template for each payment submission.

C. For Windows PC Users:

1. Open File Explorer (folder icon on taskbar) > Right click on “This PC”  
2. Click “Add Network Location” and type the path for the server and shared resource in the following format.   
[\\files.drexel.edu\projects](file:///\\files.drexel.edu\projects)

3. Once mapped, you can right click and add to the Desktop if desired.

D. For Personal Computer Users:

1. Enter drexel\userID (format abc123) in the user name field and then your password

Attach a copy of the User’s Guide and the payment template to the email.

 

**VI**: What happens if they say they cannot access the folder?

Email Accounts@ Drexel.edu the Name and Email of the person who cannot access the new secure folder and the name of the folder.

**What will IT do?**

IT will confirm that the person does have access and will contact them via email to set up a walk

through with them on how to access. If they see that they forgot to give them access they will give

them access and let you know.

**What’s Next?**

They can start to use Quick Pay.

**FOLLOW-UP!!!!**

Continue to keep everyone involved until the loop is closed.