

# Overview of the Process

Access to the Banner Admin system may not be granted until the following requirements have been fulfilled:

1. Complete the Banner Access Form (PowerForm Signer Information) for each applicable area and acquire all necessary signatures.
2. Once complete, the form will automatically be routed to the appropriate liaison via DocuSign.
3. The employee will receive an email once access has been granted.

## Banner & Network Access Form Workflow

NOTE: The number indicates the order in which received. If the number is the same, all with that number receive it simultaneously.

1. Supervisor initiates the form. (Any unknown information in the informational section can be left blank for Human Resources to complete)
2. Human Resources (Full-time employees: Donna Carr, Part-time employees: Tamara Purnell)
3. Student Module Access (April Martin), if access is needed for this module.
3. Finance Module Access (Kathy Ward), if access is needed for this module.
3. Student Accounts Module Access (Renee Perkins), if access is needed for this module.
3. Technology (ITS) 1 (Jim Winter). Do not edit routing for ITS liaisons.
3. Technology (ITS) 2 (Sam Morris). Do not edit routing for ITS liaisons.
3. Technology (ITS) 3 (Keith Sanders). Do not edit routing for ITS liaisons.
3. Technology (ITS) 4 (Skot Harness). Do not edit routing for ITS liaisons.
4. Technology (ITS) 5 (Wade Fincher). Do not edit routing for ITS liaisons.
5. Employee Needing Access

## Completing the Form(s)

Please fill out the form completely as detailed below. If you are unsure what to enter on a specific field, please contact the respective liaison listed below.

**Banner Account: Select only one of these actions.**

Banner

## System Access Form

New  Modify  Termination

- New: To establish a new Banner account.
  - NOTE: Any new paid employee must include Human Resources in the routing of the Banner Access Form. Full-time employees should be routed to Donna Carr ([dtcarr@asub.edu](mailto:dtcarr@asub.edu)) and part-time employees should be routed to Tamara Purnell ([tlpurnell@asub.edu](mailto:tlpurnell@asub.edu)).
- Modify: To make changes to an existing Banner account.
  - NOTE: If you are changing positions, Human Resources must be included in the routing of the Banner Access Form. If you are only modifying access to the Finance, Student Accounts, or Student Access Modules, Human Resources does not need to be included in the routing of the Banner Access Form.
- Termination: To disable an existing Banner account.
  - NOTE: Please include all liaisons in the PowerForm Signer Information for terminations to ensure access is removed, if necessary.

### Informational Section:

The top section is to be completed by the supervisor and/or Human Resources. If a supervisor is unsure about any of the fields contained in the informational section, it can be left blank for Human Resources to complete.

First Name: <input type="text"/>	Middle Name: <input type="text"/>	Last Name: <input type="text"/>
<small>(Full Name must match SS card)</small>		
Date of Birth: <input type="text"/>	Banner ID: <input type="text"/>	
ASUB Email: <input type="text"/>	Work Phone: <input type="text"/>	
Appropriated Title: <input type="text" value="-- select --"/>	Working Title: <input type="text"/>	
Department: <input type="text"/>	Campus Location: <input type="text" value="-- select --"/>	
Previous Incumbent: <input type="text"/>	Start (Hire) Date: <input type="text"/>	
Position Status: <input type="text" value="-- select --"/>	Position Type: <input type="text" value="-- select --"/>	
Supervisor: <input type="text"/>	Supervisor Phone: <input type="text"/>	
Supervisor Email: <input type="text"/>	Supervisor Signature: <input type="text" value="Sign"/>	

### Human Resources:

- New: Complete through "List of Direct Reports", if applicable.

**Human Resources**  New  Modify

Keep Same Access as Previous Incumbent:  Yes  No

Does this position have supervisory responsibilities?  Yes  No

List of Direct Reports:

- Modify: Complete all portions of the Human Resources section.

**Human Resources**  New  Modify

Keep Same Access as Previous Incumbent:  Yes  No

Does this position have supervisory responsibilities?  Yes  No

List of Direct Reports:

If this request is due to a transfer, promotion, or change to another position, please complete the following below as applicable.

Old Appropriated Title: _____	New Appropriated Title: _____
Old Working Title: _____	New Working Title: _____
Old Department: _____	New Department: _____
Old Campus Location: _____	New Campus Location: _____
Old Work Phone #: _____	New Work Phone #: _____
Old Supervisor: _____	New Supervisor: _____
Old Position Type: _____	New Position Type: _____
Old Position Status: _____	New Position Status: _____

**Student Module Access (If Required):**

NOTE: Student Module access does not need to be requested for part-time faculty. Adjuncts should automatically load in Banner giving them Self-Service access to enter attendance, enter grades, view rosters, etc.

- Needs Access: Complete the portion above "Registrar's Office Only".
- Not Applicable: Leave the liaison contact blank on the PowerForm Signer Information and select not applicable for this section.

**Student Module Access**    Needs Access    Not Applicable

Keep Same Access as Previous Incumbent:   Yes                  No

Provide a detailed explanation and include specific job functions that the employee will need access to in Banner Admin and Banner Self-Service. Examples: build schedule of classes, place/remove holds, student registration overrides, assign advisors, view rosters, view grades, etc.) Provide as many details as possible.

**Finance Module Access (If Required):**

- Needs Access: Complete all necessary information for the Finance section.
- Not Applicable: Leave the liaison contact blank on the PowerForm Signer Information and select not applicable for this section.

**Finance**    Needs Access    Not Applicable

Keep Same Access as Previous Incumbent:   Yes                  No

Finance General (View all budget information)                  Finance Requisition (Modify Access Required)

The options below are reserved for certain positions in administration and are subject to approval. Check all that apply.

Budget Development (Mgmt Only)                                  Purchasing

Accounting Dept.    Accounts Payable

Inventory/Receiving

Journal Entry Access

Organization and Fund Specific Access

Org #	Fund #	Access Type

**Student Accounts Module Access (If Required):**

- Needs Access: Complete all necessary information for the Student Accounts section.
- Not Applicable: Leave the liaison contact blank on the PowerForm Signer Information and select not applicable for this section.

<b>Student Accounts</b>		<input type="radio"/> Needs Access	<input type="radio"/> Not Applicable
Keep Same Access as Previous Incumbent:		Yes	No
Access Type:	View	Modify	
Requested Banner Screen(s): (List all that apply)			
Justification and Clarification of Position Tasks:			

**Information Technology Services (ITS):**

- **NOTE:** All Banner and Network Access Forms must be routed to ITS regardless of the action requested (new, modify, terminate). Leave the liaisons listed for ITS as is on the PowerForm Signer Information.
  - Needs Access: Complete all necessary information for the Information Technology Services section.
  - Not Applicable: Does not require ITS access.

<b>Information Technology Services</b>		<input type="radio"/> Needs Access	<input type="radio"/> Not Applicable
Keep Same Access as Previous Incumbent:		Yes	No
I request access to the following ASUB systems, networks, or other service(s) (check all that apply and provide additional information as needed).			
<b>1) Office 365/ SharePoint/ Intranet</b> <input type="checkbox"/> Faculty/Staff Login and Email <input type="checkbox"/> SharePoint/Intranet Access <input type="checkbox"/> SharePoint Editing ➢ Site Name: _____	<b>2) Duo Enrollment/WebXtender</b> <input type="checkbox"/> Duo Enrollment ➢ Request Fob ➢ Use Cell Phone <input type="checkbox"/> WebXtender		
<b>3) Phone/Voicemail Setup</b> <input type="checkbox"/> Voicemail and Mitel Communicator (check one) ➢ Assign old phone number: ➢ Needs new phone number <input type="checkbox"/> New Mitel Phone set (if none available) <input type="checkbox"/> Long Distance Phone Code ➢ Account to Charge _____	<b>4) Canvas LMS/Other</b> <input type="checkbox"/> Canvas LMS Access <input type="checkbox"/> Administrator rights to computer ➢ Y ___ or N ___ ➢ Other: _____ <input type="checkbox"/> VPN Access (Access to network resources while off-campus)		

**Required Signatures**

The supervisor must sign and date the form.

Liaison Signatures Required: Signature(s) of each liaison from which you are requesting access (e.g., if you are requesting Student Module and Finance access, you would need signatures from both liaisons). If you are requesting Finance fund or org access, you need a signature from the Finance liaison. See below for reference on liaison module responsibilities.

<b>Department</b>	<b>Functional Liaison</b>
<b>Finance Module (If Required)</b>	Kathy Ward
<b>Human Resources</b>	Full-time employees: Donna Carr Part-time employees: Tamara Purnell
<b>Information Technology Services (ITS)</b>	Wade Fincher
<b>Student Access Module (If Required)</b>	April Martin
<b>Student Accounts Module (If Required)</b>	Renee Perkins

## **Submitting the Form**

All Banner Access Forms are now being completed electronically through DocuSign. Please contact the respective liaison if you have any questions regarding the form.