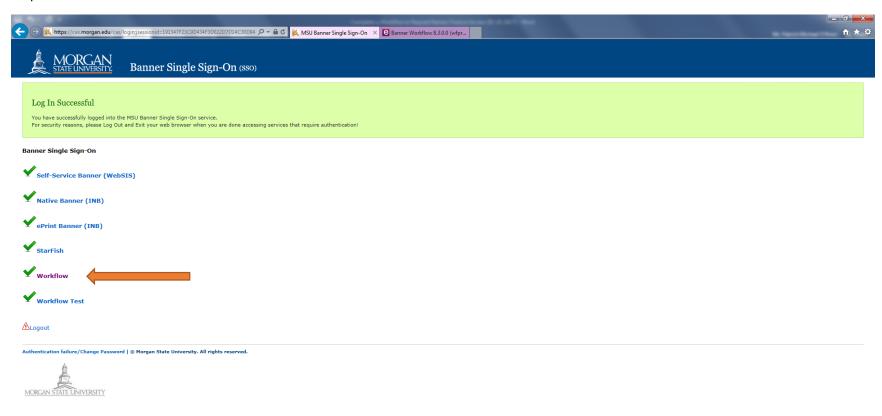# Process of Completing a Workflow to Request Banner Finance Access/ Access Changes

Step 1: Access the Banner Single Sign-On menu (https://cas.morgan.edu/cas/login)

Step 2: Click on 'Workflow'

Step 3: Click on 'My Processes'

Step 4: Click on 'Banner Finance Security Access Request'

Starting the Banner Finance Security Access Workflow

1. (optional) Workflow Specifics Name (user determined, but could use verbiage such as 'Update Jo Smith 01-10-17')
2. (optional) Workflow Note (user determined)
3. Email Address of person whose access is being requested to be adjusted
4. (optional) Attach file (attaching documentation can happen any time during the Workflow creation)
5. Click 'Start Workflow'

Starting the Banner Finance Security Access Workflow (continued)

6. Click 'OK'

Starting the Banner Finance Security Access Workflow (continued)

7. The newly created Workflow will appear on your Worklist
8. Click on the new Workflow

Completing the Banner Finance Security Access Workflow

9. All fields marked with a * are mandatory
10. Fill in the specific fields for the changes requested for Banner Finance access
11. To complete the Workflow, check 'I approve the request' and 'Complete'.
    a. To put the Workflow on hold, click 'Save and Close'.
    b. To cancel the Workflow, click 'Cancel'.
12. Once the Workflow is completed and approved, it will be forwarded to the Comptroller's Office for further processing.

Banner Finance Supervisor Approval -- Employee Banner Security Access Request Form

Home
- Worklist
- Workflow Alerts

User Profile
- My Processes
- User Information
- Change Password

Request Date: 10-Jan-2017 04:53:53 PM

EMPLOYEE'S INFORMATION

Employee Name: Wanda Wiggins

Employee Class: Classified Non-Exempt FT

Employee Id #:   00184157

Employee Department: F1301 - Comptroller's Office Dept Budget

EmployeeDepartment Financial Manager: O'Brien, Patrick M.

* Employee Campus Email Address: wanda.wiggins@morgan.edu

* Employee Phone Number:

* Affiliation: Staff

SUPERVISOR'S INFORMATION

* Supervisor's Name: Patrick O'Brien

Supervisor Department: F1301 - Comptroller's Office Dept Budget

Warning: No Department Mismatch

* Supervisor's Email: patrick.obrien@morgan.edu

* Supervisor's Phone:

REQUESTED SERVICES

* Banner Oracle Id: WWIGGINS

* Type of Request: Add New Banner User

* Terminate Banner Finance Access: No

* Select the Banner environment: PROD

Mirror this user's access with Banner Oracle Id# or name:

* Access Start Date:

Access End Date:

SELECT THE APPROPRIATE TYPE OF BANNER FINANCE ACCESS

Banner Finance access is defined within **classes.**
A user can only serve as either a requisitioner or an approver; not both.
Select the appropriate class(es) listed below (in alignment with the MSUemployee?srole):

* Approver

○ Yes   ● No

Assigned to Approval Queue Id: Assigned to Queue

* Budget Transfer

○ Yes   ● No

* Purchasing Card

* Purchasing Card

○ Yes   ◉ No

* Budget Query

○ Yes   ◉ No

* Create Requisitions

○ Yes   ◉ No

Other Access:

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None
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PROVIDE USER PROFILE INFORMATION FOR BANNER FINANCE ACCESS

Select the Cost Centers to be added or terminated.

* Cost Center Index 1:	Select Cost Center Index
* Cost Center Index 1 Access:	Query Only
* Cost Center Index 2:	Select Cost Center Index
* Cost Center Index 2 Access:	Query Only
* Cost Center Index 3:	Select Cost Center Index
* Cost Center Index 3 Access:	Query Only
* Cost Center Index 4:	Select Cost Center Index
* Cost Center Index 4 Access:	Query Only
* Cost Center Index 5:	Select Cost Center Index
* Cost Center Index 5 Access:	Query Only

If you need more than 5 cost centers, please specifiy what you need and why you need it.

More Cost Centers Explanation:

Click 'I approve this request' then click 'Complete' to submit the request to the coordinator.

* **Supervisor Approval**
○ I approve this request

* Approval Date: 10-JAN-2017

[Complete]   [Save & Close]   [Cancel]

Attachments