

Banner Finance Access Form Instructions

The Banner Finance Access form should be completed for new users of the Banner Finance system or for current users in need of changes/updates to their Banner Finance access.

Banner Finance Access request is routed through a DocuSign process. To request Banner Finance access, navigate to the Employee tab of your myBama page and in the Banner Access Forms section click the [Banner Finance Security Access Request Form link](#). The requestor will need to input their name and email twice, first as the Requestor and a second time for Document Tracking purposes. The requestor will also need to input a Fiscal Manager/Dean/Department Head's name and email as Approver. Cara Greene's name and email are auto-filled to notify her to invite the new Banner user to the Banner Finance Users Group in Teams. Once signer information is completed, click the Begin Signing button.

Please enter the appropriate information:

NAME: name of the banner user

MY BAMA USER ID: The Office of Information Technology issues the myBama user ID at employee orientation.

CWID: campus wide identification number

PHONE: work phone number

FAX: work fax number

BOX: work box number

DEPT NAME: department name where this user will be employed

EMAIL: preferred work email address

New Employee: If the employee is a new employee, choose this option

Transfer from another UA department – as of date: If the employee transferred from another dept on campus, choose this option.

Update Access: If a current employee needs a change in security, choose this option.

Leaving UA: If this employee has been terminated, retired or left UA, choose this option.

Will this employee need to view contract and grant funds?

If the employee will need to view inception-to-date funds on Banner forms FRIGITD, choose Y.

Contract and Grant Accounting requires training to be completed before access to their forms is given.

Will this employee need to view budget data?

If the employee will need to view budget data, choose Y.

Will this employee prepare budget revisions?

If the employee will be recording budget changes through FZAJVCD, choose Y.

Will this employee need to view salary budget data (FZISBWW)?

If the employee will be viewing salary budget data for the department, choose Y.

Same access as another user:

If the employee's access should clone that of another user, please list that employee's name.

List banner organizations/organization rollups/organization range (departments) assigned to this employee:

Enter the organization codes or a range of codes for which the employee will need to access.

For any questions regarding Banner Finance Access contact Starr Deas in Financial Accounting and Reporting at msdeas@ua.edu or 8-9890.

Your Banner Finance Access will be processed as quickly as possible. The employee will be notified via email that his/her security setup is complete and will be provided instructions regarding his/her security token.

BANNER FINANCE ACCESS FORM

*NAME: _____

*MYBAMA USERID: _____

*CWID: _____

*PHONE: _____

FAX: _____

*BOX: _____

*DEPT NAME: _____

*EMAIL: _____

Please select one:

New Employee

Transfer from another UA department – as of date: _____

Update access - Please describe updates needed: _____

Leaving UA

Will this employee need to view contract and grant funds?

Will this employee need to view budget data?

Will this employee prepare budget revisions?

Will this employee need to view salary budget data (FZISBVW)?

Same access as another user: _____

List Banner Orgn rollup/Orgns/Orgn range (departments) assigned to this employee:

APPROVAL: _____