

INSTRUCTIONS TO OBTAIN ACCESS TO BANNER FINANCE AND THE WEBFOCUS DASHBOARD

Request to be completed by the Supervisor of the Faculty/Staff member requiring access.

Request Location -
<https://its.appstate.edu/forms/request-banner-account-options>

The screenshot shows the 'Request Banner Account Options' form on the Appalachian State University Information Technology Services website. The page has a dark header with the university logo and a search bar. A navigation menu includes 'Support', 'Forms', 'Security', 'Maintenance', 'IT Governance', 'Data Governance', and 'About'. The main title is 'Request Banner Account Options'. On the left, there is a sidebar with a list of request types, including 'Request for Non-Employee User Account', 'ITS Account Request For AdmissionPros', 'Analytics Access Request', 'Time Entry Security Form', 'Username Change Request', and 'Request Banner Account Options' (which is highlighted). Below the sidebar is a 'Technology Application & Service Catalog' section with the TASC logo. The main content area includes a breadcrumb trail 'Home / Forms / Request Banner Account Options', instructions to complete all fields, a list of three requirements (Requester Information, User Information, and Access Type), a note about processing time, and a requirement that the requestor be the supervisor or authorized designee. There are two radio button options: 'Add Options (for new or current banner users)' (selected) and 'Delete Options (for current banner users only)'. The form fields are: 'Reason for request' (dropdown), 'Effective date' (Month, Day, Year dropdowns), 'Requested by *' (text input), 'Phone Number of Requester' (text input), and 'Email of Requester' (text input). All input fields are highlighted in yellow.

Appalachian STATE UNIVERSITY

Search terms

Information Technology Services

Support **Forms** Security Maintenance IT Governance Data Governance About

Request Banner Account Options

Request for Non-Employee User Account

ITS Account Request For AdmissionPros

Analytics Access Request

Time Entry Security Form

Username Change Request

Request Banner Account Options

Technology Application & Service Catalog

TASC
TECHNOLOGY APPLICATION • SERVICE CATALOG

Home / Forms / Request Banner Account Options

Please be sure to complete all of these steps before submitting this form:

- Complete all fields below for **Requester Information** (person making the request)
- Complete all fields below for **User Information** (person for which access is being requested)
- Select the **type(s) of access you are requesting** and complete the additional fields

NOTE: Every effort is made to process requests in a timely manner. Requests are usually processed within 2 business days, but some may take longer. Thanks in advance for your patience.

The requestor must be the **supervisor** of this user, or **authorized designee**. Please explain for whom you are a designee. For options in the **Banner Human Resources** section, the requestor must be the **department head only**.

Options *

- Add Options (for new or current banner users)
- Delete Options (for current banner users only)

Requester Information

Reason for request

Effective date

Month Day Year

Requested by *

The requester must be the supervisor of this user, or authorized designee. Please explain for whom you are a designee. For options in the Banner Human Resources section, the requestor must be the department head only.

Phone Number of Requester

Email of Requester

User Information

Please enter the information for the user needing access to Banner or other systems.

Name of person needing access *

Email address of person needing access *

Banner ID of person needing access *

User Department *

User Job Title

Non-Paid Volunteer

No

Yes

Graduate Assistant

No

Yes

Type of Access *

Please select the type of access that you are requesting for the user.

- Banner Student
- Banner Accounts Receivable
- Banner Advancement
- Banner Finance for Department Users
- P-Card Funds Needed
- Yo-Mart
- Banner Foundation Finance for Department Users
- Banner Human Resources
- Banner Student Financial Aid

Submit

AFTER SELECTING BANNER FINANCE FOR DEPARTMENT USERS THIS SCREEN WILL APPEAR:

Banner Finance for Department Users

Banner Finance for Department Users

Banner Finance Self Service, Eprint and Campus Budgets Dashboard (Chart A)

HR/Payroll Dashboard

(NOTE: salary and personnel information is included)

Funds Needed

List the funds needed. Please use a semicolon to separate funds (ex. 109308;109310;) and make sure to check the box(es) above.

Finance Auxiliary Billing (FZAAUXB, FZPRAXB)

Submit

CHOOSE BANNER FINANCE, SELF SERVICE, EPRINT AND CAMPUS BUDGETS DASHBOARD (CHART A) AND LIST FUNDS YOU REQUIRE ACCESS TO.