**Banner Account Setup Form**

***(CIS Use Only)*** *User ID:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

**Important! Completion of Banner Basics training is required before a Banner account will be issued. Visit the ITO Short Course website at** <http://www.umt.edu/it/shortcourse> **for class schedules. For additional questions, contact the Banner Help Line at 243- 2667 (BNNR) or email your questions to** **bannerhelp@mso.umt.edu****.**

APPLICANT - Complete Items 1-10. In addition, Banner Finance users MUST also complete Section #1 on other side of this form. PLEASE PRINT CLEARLY:

**1**. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ UM ID#: \_\_\_\_\_\_\_\_-\_\_\_\_\_\_-\_\_\_\_\_\_\_\_\_

 Last Name (print) First Name Middle *(Provide your UM ID#,* ***not*** *your SSN.)*

**2**. Full Department Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Org #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**3.** Campus: (circle one) UM-Msla UM-Msla-COT UM-Western UM-Tech UM-HCOT Other \_\_\_\_\_\_\_\_\_\_\_\_\_

**4.** Status: (circle one) Staff Faculty Administrator Student Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**5**. Job title \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email Address:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Ph: \_\_\_\_\_\_\_\_\_\_\_\_

 Complete email address

**6.** This is a request to: □ **Create** a new account. I am replacing (whom?) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

□ **Modify** an existing account: User\_ID: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

□ **Delete** an existing account: User\_ID: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**7.** Describe Access Needed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**8.** I have read the Statement of Computer Ethics and the Student Right to Privacy policy attached to this form and I agree to abide by the policies therein. I have retained the statements for my reference.

Applicant Signature (Required): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**9.** Authorization ***(Must be completed by your supervisor):***

As departmental representative, I approve the access requested by the above employee on both sides of this form. If the user of the above computing account leaves this department, I will submit another Banner Account Request Form to have that user deleted.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of Supervisor Printed Name Phone Date

**Reminder!!** For access to **BANNER FINANCE**, you MUST complete the other side of this form!

**10. When form is completed, route to BANNER SYSTEMS COORDINATOR – LOMMASSON CENTER, LOM236.**

*INTERNAL USE ONLY*

Banner Security Profile: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Exceptions to Profile: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of Banner Systems Coordinator: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*CIS USE ONLY*

Trainer Certification: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Implemented by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Notified by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Section #1: Departments Must complete to obtain access to Banner Finance.**

***(CIS Use Only)*** *User ID:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

Step #1: Will you be a Query Only User (non-data entry user)? Yes\_\_\_\_\_\_\_ No \_\_\_\_\_\_\_\_

**IF YOU ANSWERED “YES” TO STEP #1, STOP HERE! For additional Banner Finance access, continue to Step #2.**

**Step #2 (Functional Role):** If you will be entering transactions into Banner Finance, the following must be completed:

|  |
| --- |
| **Functional Role**: (Pick as many as needed depending on duties performed) |
| * Budget Adjusts
 | * Requisitions
 | * Purchase Orders
 | * Invoices
 | * Journal Vouchers
 | * ProCard redistributions
 |

**Special Role: (Limited Users Only)**

|  |
| --- |
| * Inter-departmental Charges: Reserved for Campus Quick Copy, Chem Stores, IMS, Mansfield Library, CIS, Telephone, Printing Services, Facilities Services.
 |

**Other:**  (Additional Forms and/or Processes) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 **Step #3 (Fund/Org Security):** Supervisor must mark the appropriate Fund/Orgs you will be authorized to enter transactions on.

*Please check only one option:*

Option A: \_\_\_\_\_ **All Funds and Orgs** for this department. Do NOT fill out section below.

Option B: **\_\_\_\_\_ is limited to the following Index/Fund/Org (Fill out next section, only if choosing Option B)**

Limited Use to:

### Index \_\_\_\_\_\_\_\_\_\_\_\_Fund \_\_\_\_\_\_\_\_\_\_\_\_ Org \_\_\_\_\_\_\_\_\_\_\_\_ Index \_\_\_\_\_\_\_\_\_\_\_\_\_ Fund \_\_\_\_\_\_\_\_\_\_\_\_ Org \_\_\_\_\_\_\_\_\_\_\_\_

### Index \_\_\_\_\_\_\_\_\_\_\_\_Fund \_\_\_\_\_\_\_\_\_\_\_\_ Org \_\_\_\_\_\_\_\_\_\_\_\_ Index \_\_\_\_\_\_\_\_\_\_\_\_\_ Fund \_\_\_\_\_\_\_\_\_\_\_\_ Org \_\_\_\_\_\_\_\_\_\_\_\_

**Step #4 (Required) Approval Queue Maintenance**: Please review and fill out appropriate Approval Queue Setup forms which can be found on our Business Services website: <http://www.umt.edu/bussrvcs/Forms.htm>

If there are any questions regarding Banner Finance setup, please call Business Services – Finance Security Coordinator at x2940. Be sure to complete items 1-10 on the opposite side of this form. Return form to Banner Systems Coordinator – LOM236.

*(Section #2: Systems/DBAs Use Only)*

Banner Finance Security Classes (BAN\_FINANCE):

|  |  |  |
| --- | --- | --- |
| * BASE **(all users)**
 | **Systems Staff (Limited)** | **Internal Business Services Staff**  |
| **Departmental Classes** | * ADMINISTRATOR
 | * INT\_ACCTNG\_1
 | * INT\_PAYABLE\_1
 |
| * DEPT\_ACCTNG
 | * INT\_APPROVALS\_1
 | * INT\_ACCTNG\_2
 | * INT\_PAYABLE\_2
 |
| * DEPT\_BUDGET
 | * INT\_SECURITY\_1
 | * INT\_ACCTNG\_3
 | * INT\_PURCH\_1
 |
| * DEPT\_PAYABLE
 |  | * INT\_BUDGET\_1
 | * INT\_PURCH\_2
 |
| * DEPT\_PURCH
 |  | * INT\_BUDGET\_2
 | * INT\_RECON\_1
 |
| * PROCARD2
 |  | * INT\_FIXED\_1
 | * INT\_TRAVEL\_1
 |
|  |  | * INT\_GRANT\_1
 | * INT\_VEND\_1
 |
|  |  | * INT\_GRANT\_2
 | * GOV\_FINANCE\_PROFILE\_1
 |
|  |  | * INT\_GRANT\_PAWD
 |  |

Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Assigned: (DBA initials) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date:\_\_\_\_\_\_\_\_\_\_\_\_\_ □ Email Reply Back (bfinance\_security@mso.umt.edu):

######

###### (Section #3: Business Services/Accounting Use Only)

###### Accountant: (Complete for data entry users only). Review Section #1. Indicate the Fund Types and Orgs authorized.

* **Option A (Standard**): **All Fund Types, except E, L and limited to the following Orgs**

Org \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Org \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Org \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Org \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Org \_\_\_\_\_\_\_\_\_\_\_\_\_\_

Org \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Org \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Org \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Org \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Org \_\_\_\_\_\_\_\_\_\_\_\_\_\_

* **Option B**: **Limited Fund Type/Fund/Org Security:**

Fund Type \_\_\_\_\_ Fund \_\_\_\_\_\_\_\_\_\_\_\_\_\_ Org \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Fund Type \_\_\_\_ Fund \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Org \_\_\_\_\_\_\_\_\_\_\_\_\_\_

Fund Type \_\_\_\_\_ Fund \_\_\_\_\_\_\_\_\_\_\_\_\_\_ Org \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Fund Type \_\_\_\_ Fund \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Org \_\_\_\_\_\_\_\_\_\_\_\_\_\_

Fund Type \_\_\_\_\_ Fund \_\_\_\_\_\_\_\_\_\_\_\_\_\_ Org \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Fund Type \_\_\_\_ Fund \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Org \_\_\_\_\_\_\_\_\_\_\_\_\_\_

* **Option C:** **Master Fund/Master Org - Limited Users Only!** **Other :**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

BS/Accountant: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ BS/Systems Security: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 (Signature/Date) (Signature/Date)



#### **Statement of Computer Ethics**

Please retain this page for your reference!

An account on a central computer gives you the privilege of accessing information, resources, and computing power. This privilege carries with it certain responsibilities. Abuse of computing resources is a serious offense for which you may lose computing privileges and may be subject to disciplinary action by the University. The following list gives some guidelines regarding ethical use of computer systems. For additional information or clarification of these guidelines, please contact the CIS User Services Staff (call 243-5455)

* Information stored in a computer is no different from information appearing in print or in someone’s personal possession. Therefore, please apply normal standards of academic ethics and polite conduct to their use of computing services, including respect of privacy.
* Do not encroach on others’ use of the computer. The most obvious examples are attempts to modify the system or cause it to crash. Less obvious are such things as tying up computer resources for excessive game playing or trivial applications, using excessive amounts of permanent file space, running grossly inefficient programs where efficient ones are available, wasting the time of other users by trying to link to their jobs, or interrupting others while they’re working.
* Do not try to access the private files of others even if those files are unprotected. Browsing through someone’s files is not ethically different from browsing through someone’s desk or notebook. Using another’s program or procedure without permission is equivalent to plagiarism. Even reading another’s program without permission is at least an invasion of privacy, and equivalent to unauthorized use of research equipment. Users who need information should request it formally from its owner or from persons responsible for its maintenance.
* The computing facilities of the University are limited and should be used wisely and carefully. Computer services allocated to individuals through their user accounts should be respected by all as private and valuable property for academic pursuits.
* You are responsible for your own area. Make certain that there is no unauthorized use of your area by others. Guard your password and if you suspect someone knows it, change it immediately.. When you are working with another user, it is polite to look away while that person types his or her password.
* Certain central computer accounts allow you to access wide-area networks, which provide electronic mail for communicating with users at other sites and other services, such as transferring files among various computer systems throughout the country and the world. All guidelines outlined above apply to the use of computer networks; each network may have additional guidelines that you are expected to follow. For example, BITNET is not to be used for commercial purposes (such as selling software).
* See Student Right to Privacy Policy on reverse side of this page. ⇒



#### **Student Right to Privacy Policy**

According to state and federal laws, students have the right to privacy regarding their student records. **If the student has requested confidentiality, no information can be shared with a third party except for authorized University personnel with a legitimate educational interest.**

If the student has not requested confidentiality, the following directory information and **only** this information may be released to anyone:

* Student name
* Addresses including email
* Telephone number
* Dates of attendance
* Full-time/part-time status
* Date of graduation and degree received
* School or college
* Majors (and minors)
* Class (i.e., freshman, sophomore, etc.)
* Student ID photo
* Academic awards or honors