

## Finance Systems Management

Date: January 2014

### Requesting Finance Organization Security FSJA-094

This job aid is specific to requesting Finance Org Security. For information on submitting a Banner Authorization Request (BAR), see FastInfo answer ID: 1586 – How Do I complete a Banner Authorization Request.

In order to view Finance information users must have Finance Org Security.

To request new or additional Finance Org Security users must submit a BAR.

1. Login to the BAR from the MyUNM Portal.
2. Create Request.
3. Enter Supervisor's NetID.
4. Enter a valid business purpose, be specific.
5. Scroll down to the section:
  - Role-Specific Settings
6. In the Select Finance Orgs box.
  - *If you do not see this box, then you did not select Department General Inquiry on your BAR.*
7. Enter Org Code you need access to.
  - Use the View Org Hierarchy link to select appropriate level 5 org codes.
 For Example, if you need:
  - 594A, 594B and 594C
  - View the hierarchy, you will note 594B and 594C roll up to 594A, therefore you only need to request 594A.
8. Once you select the 'Add Finance Org' button, the screen will display valid org(s) with a Status of 'New'.

**Select Finance Orgs**

*Use this box to select organizations for which you should have query-only finance org security. All organizations subordinate to those you select will be added automatically.*

Remove	Status	Finance Organization
<input type="checkbox"/>	New	485A Credit, Collections & Merchant Serv
<input type="button" value="Remove"/>		

Enter org code:   [Find Org Code](#) [View Org Hierarchy](#)

9. Follow steps 7 and 8 until all orgs have been entered.
10. You will only receive access to Org Codes you select, subject to security approvals. Make sure you have requested all the orgs you need.
11. Scroll to the bottom of the page and select Next.
12. Review your request, scroll to the bottom of the page and submit your request.
13. If your BAR has been submitted successfully, you will receive a confirmation email.
14. Once your security is approved, you will receive another email stating the roles have been approved.

The BAR is routed electronically via workflow and Org Security must be approved by Fiscal Agents.

If you have questions, please send an email to [FSM@unm.edu](mailto:FSM@unm.edu).

For additional information see  
Or the Job Aid  
FSJA-107 Finance Security Matrix  
(<http://fssc.unm.edu/job-aids.html#fin>)

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