**Requesting Banner Finance Org Security through the Banner Authorization Request (BAR)**
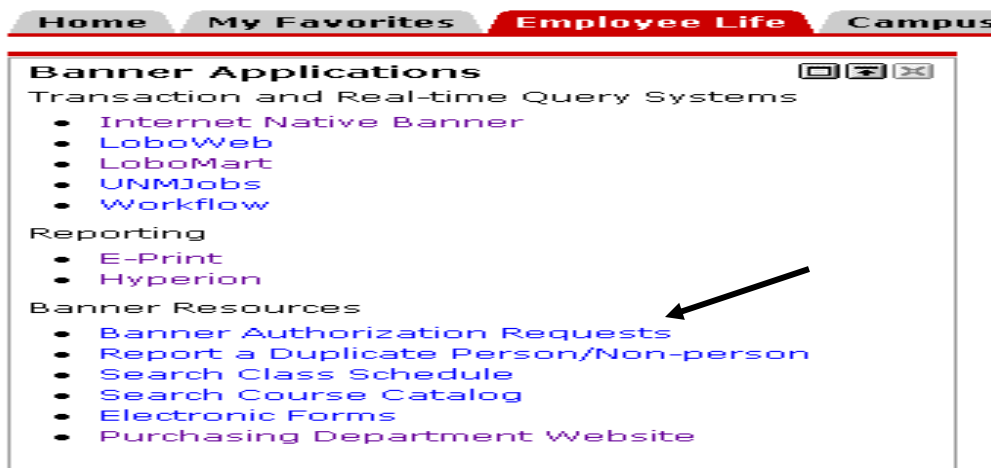
1. Access the Banner Authorization Request from My.unm.edu:



2. Login



3. Select 'Create Request'

4. Enter your Supervisor's netID and add the reason for this request.

| Home | Edit Request | Roles By Function | Roles By Name | Roles By Org | Search Roles | My Training | My Requests | Help | Logout |

## Edit Authorization Request

**Request ID:** 25515    **Created:** Mar-26-2010    **Status:** Open

### Supervisor and reason for request

Supervisor's netID: `LBLACK`    Don't know the person's netID? Look it up in the UNM directory

Reason you need this change in Banner access:
*Please be specific. For example: "My job has changed and I will be entering time for my org"*

5.  Scroll down until you see 'Role-Specific Settings'.  To add Orgs to your Finance roles, use the 'Select Finance Orgs' box.  For this example please note no Org codes have been selected.   Please note that you will only receive access to the Org codes you select, subject to security approvals.

### Role-Specific Settings

**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.*
None selected.

Enter org code: [         ]  **Add Finance Org**    Find Org Code    View Org Hierarchy

**Select Redistribution Orgs**
*Use this box to select redistribution organizations. Note: subordinate organizations will NOT be selected automatically; you must select each organization individually.*

| Remove | Status | Redistribution Organization |
|---|---|---|
| ☐ | You have it | 594D Financial Services Support Center |
| ☐ | You have it | 480A Controller Administration |
| ☐ | You have it | 594A Finance Systems Management |

**Remove**

Enter org code: [         ]  **Add Redistribution Org**    Find Org Code    View Org Hierarchy

**Select HR - Payroll Orgs**
*Use this box to select timekeeping, reporting and EPAF organizations. Note: subordinate organizations will NOT be selected automatically; you must select each organization individually.*

| Remove | Status | HR – Payroll Organization |
|---|---|---|
| ☐ | You have it | 594A Finance Systems Management |

**Remove**

Enter org code: [         ]  **Add HR - Payroll Org**    Find Org Code    View Org Hierarchy

**Role Proxies**
Proxies for: EPAF Labor Distribution Chg–First Level Approver

**Add Proxies**

**Withdraw this request**    **Save for later**    **Next ->**

If there are no Org codes listed in the 'Select Finance Orgs' box and you are not a user requesting Finance security for the first time, it means you were grandfathered in with Finance Org Security as part of the Banner 8 implementation.  To verify what Org codes you currently have security access for, go to Banner form FOMUSOR, enter your NetID, tab and perform a next block.  Here is an example of what user **lblack** has access to:



These Org codes will need to be included in your Banner Authorization Request if they aren't already listed in your Banner Authorization request.

7.  Enter the Org Code in the 'Enter org code' box.  Select Add Finance Org.
    **NOTE:**  If this option is not available, you MUST select Department General Inquiry from the Banner Finance Roles.

## Role-Specific Settings

### 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.*

None selected.

Enter org code: `485A`     **Add Finance Org**     Find Org Code   View Org Hierarchy

Once you select the 'Add Finance Org' button you'll see that the status is 'New', and the Org number and title is populated.

### 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 |
|---|---|---|
| ☐ | New | 485A Credit, Collections & Merchant Serv |

Remove

Enter org code: [ ]   **Add Finance Org**   Find Org Code   View Org Hierarchy

### Select Redistribution Orgs

*Use this box to select redistribution organizations. Note: subordinate organizations will NOT be selected automatically; you must select each organization individually.*

| Remove | Status | Redistribution Organization |
|---|---|---|
| ☐ | You have it | 594D Financial Services Support Center |
| ☐ | You have it | 480A Controller Administration |
| ☐ | You have it | 594A Finance Systems Management |

Remove

Enter org code: [ ]   **Add Redistribution Org**   Find Org Code   View Org Hierarchy

### Select HR - Payroll Orgs

*Use this box to select timekeeping, reporting and EPAF organizations. Note: subordinate organizations will NOT be selected automatically; you must select each organization individually.*

| Remove | Status | HR - Payroll Organization |
|---|---|---|
| ☐ | You have it | 594A Finance Systems Management |

Remove

Enter org code: [ ]   **Add HR - Payroll Org**   Find Org Code   View Org Hierarchy

### Role Proxies

Proxies for: EPAF Labor Distribution Chg-First Level Approver

**Add Proxies**

**Withdraw this request**     **Save for later**     **Next ->**

8.  After all Orgs needed are requested select 'Next >'.

The review screen will come up, allowing you to review your request before submitting it.

**Review request before submitting**

| | |
|---|---|
| **Request ID:** 25515 | **Request created:** Mar-26-2010 |
| **Status:** Open | **Last accessed:** Mar-26-2010 |

**Supervisor and reason for request**

**Supervisor's netID:** LBLACK  (Lorrie S Black)
**Reason you need this change in Banner access:** Requesting access to query Orgs in the Finance Administration per my supervisors request.

**Access role(s) and actions requested**

| Action Requested | Role Name | Training Status |
|---|---|---|
| Retain | Hyperion Operational Data Store Department | ☑ |
| Retain | Department Direct Pay Processor | ☑ |
| Retain | Department General Inquiry | ☑ |
| Retain | Department Journaler | ☑ |
| Retain | Department Pcard Reallocator | ☑ |
| Retain | Department Pcard Reviewer | ☑ |
| Retain | Department Purchase Requisitioner | ☑ |
| Retain | Finance Systems Mgmt Administrator | ☑ |
| Retain | Finance Systems Mgmt COA Administrator | ☑ |
| Retain | Finance Systems Mgmt Data Administrator | ☑ |
| Retain | Finance Attribute Updater | ☑ |
| Retain | EPAF Labor Distribution Chg-First Level Approver | ☑ |
| Retain | EPAF – Labor Distribution change Originator | ☑ |
| Retain | Approve Labor Redistributions | ☑ |
| Retain | Department Labor Redistributions | ☑ |

**Organization Security**

**Finance Organizations**

Credit, Collections & Merchant Serv (485A)

**Redistribution Organizations**

Financial Services Support Center (594D)
Controller Administration (480A)
Finance Systems Management (594A)

**HR - Payroll Organizations**

Finance Systems Management (594A)

**Selected Role Proxies**

No proxies selected for EPAF Labor Distribution Chg-First Level Approver.

Please review the Org codes listed under the Finance Organizations above. Are all Org codes listed? If not, please return to step 6 to add additional Org codes. If yes, then please continue to step 9.

Please note that you will only receive access to the Org codes you select, subject to security approvals.

9. After reviewing your request, scroll to the bottom of the page and select 'Submit Request'.

**Training Status**

COMPLETE. According to EOD's records, you have taken all of the courses which are required for the access roles you are requesting.

<- Back    Withdraw Request    Save Request    Submit Request

You will receive an email saying that your Banner Authorization Request has been submitted.

If you need any assistance with this please contact the Financial Services Support Center @ 277-3457.