

Banner Finance System Access Request Form

Application Process Steps

1. Accountholder fills in the form (online PDF fill-able form)
 2. Accountholder prints completed form, signs & dates part 11 of the request form.
 3. Manager signs and dates part 12 of the request form.
 4. Accountholder or Manager faxes application to the Budget Office x8652
 5. Budget Office reviews request and, if access will be granted, signs Part 13 of the request form.
 6. Budget Office creates a Remedy ticket to inform ISOS-IDM group about the approved request (NUID, SSB role & INB class). Ticket will also trigger an email to the person requesting access, notifying them that the request is being processed.
 7. Information Services creates Oracle ID, assigns appropriate SSB roles & INB classes, and assigns appropriate LDAP roles to activate portal channels.
- Note to person requesting access - portal links may be active, but will not function until Budget completes step #9 below.
8. Information Security notifies Budget when account is created and transfers Remedy ticket back to Budget.
 9. Budget Office updates Finance security record.
 10. Budget closes Remedy ticket, which notifies Accountholder that the access is available.

NOTICES TO APPLICANT

NOTICE OF APPROPRIATE USE POLICY (AUP) and RIGHT TO CHANGE APPROPRIATE USE POLICY

All individuals accessing Northeastern University systems are required to read and comply with the Appropriate Use Policy for Computers and Networks. The current policy is located at <http://www.infoservices.neu.edu>

The University reserves the right to change the Appropriate Use Policy or any portion of the policy, at any time, without prior notice. Changes to the policy are effective upon posting at <http://www.infoservices.neu.edu>, where the most current version resides.

NOTICE OF REQUIREMENT TO MAINTAIN CONFIDENTIALITY

All individuals engaged by the University are required to keep all Northeastern University Information strictly confidential. No use or disclosure of any kind is permitted, except only as may be authorized under the terms/scope of employment, engagement, and/or as may be explicitly authorized in writing by an officer of the University.

NOTICE OF ACCOUNTHOLDER and MANAGER RESPONSIBILITY

Accountholders are responsible for all transactions conducted under their user ID.

Managers are responsible to notify Information Security when an individual whom they have approved for access, is transferred or terminated from their department.

This page should be kept by the person requesting system access. All other pages will be faxed to the Budget Office

Banner Finance System Access Request Form

Part 1: Accountholder Information

(Required for Consultants and temporary employees)

Part 2: Type of Access Requested (required for all applicants)

Part 3: Organization code(s) requested - (Required for all applicants)

Part 4: Fund code(s) requested - (Required for all applicants)

If not standard access, list fund codes and/or fund types below:

Part 5: SSB Roles - (Required for all applicants)

Part 6: SSB Departmental Approval Types - (Required if Online Approvals in Part 5 = Yes)

Part 7: INB Roles - (Only applicable for INB Applicants)

Part 8: INB Approvals - (Not required for all applicants)

Part 9: INB Authorizations - (Not required for all applicants)

Part 10: Invoice Processing - (AP function - Not allowed for most applicants)

Invoice Types:

Invoice Tolerances:

Part 11: Banner Finance Accountholder Agreement

Northeastern University systems are to be used according to the terms of the Appropriate Use Policy (www.infoservices.neu.edu). By requesting access, I agree to the terms of the Appropriate Use Policy, and further agree to: access, use, distribute and share data only as needed to conduct University business as specified in my position/engagement description, to respect the confidentiality and privacy of individuals whose records or data I access, to observe all ethical and legal restrictions that may apply to data I view or handle, to protect my password and be personally accountable for all work performed under my user IDs and passwords, to logout when leaving my workstation, to report knowledge of security breaches or information security policy violations to NU Information Security, and to comply with all department and University policies and procedures.

NOTICE

THIS APPLICATION IS NOT AN EMPLOYMENT CONTRACT IN ANY FORM, ALTHOUGH ADHERENCE TO THESE STANDARDS IS A CONDITION OF EMPLOYMENT OR CONTINUED ROLE. ACCESS GRANTED PURSUANT TO THIS APPLICATION DOES NOT GIVE RIGHTS OF ANY KIND, AND MAY BE CHANGED BY NORTHEASTERN UNIVERSITY WITHOUT NOTICE AT ANY TIME.

I have read and will abide by the above agreement and the Appropriate Use Policy. Under these terms, I request access to the Banner Finance System be approved according to the specifications contained in this request.

Accountholder Signature _____ Date _____

Part 12: Banner Finance Manager Approval and Certification

As the manager or supervisor of the accountholder named above, I approve this request for data access in accordance with University Policy. I certify the access requested is necessary to allow the accountholder to perform assigned work-related duties.

Manager Name (printed)_____

Manager Signature _____ Date _____

Part 13: Budget Office Approval and Certification

I have reviewed this request for access, and find it appropriate for the named accountholder. By signing below, I request Banner Finance access be established for the named accountholder according to the specifications contained in this request.

Budget Office Approver Name (printed)_____

Budget Office Approver Signature _____ Date _____