INFORMATION TECHNOLOGY PROCEDURE

INB Banner User Access Procedures

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1. Introduction

The purpose of this document is to guide the user to completion of the Enterprise Banner Access Request Form located in link below.

http://www.alamo.edu/uploadedFiles/District/Employees/Departments/IT/files/Banner-Request-For-Access-Form.docx

The form is composed of three main sections, User Identification, Authorizations, and Approvals. Each section has subsections to clarify the purpose for each. This request process is meant for core department functions only.

**NOTE:** Banner INB accounts are not necessary for any Banner General Self Service.


The document flow will be as follows:

1. Request is initiated by or for an employee.
2. Request is sent to employee Supervisor for Approval
3. Request is sent to District IT Security Office (security@alamo.edu)
4. Request is Routed by District IT Security Office to receive the appropriate approvals
5. Request is Returned to District IT Security Office (security@alamo.edu)
6. Step 4 & 5 are repeated until
   a. Approval process complete
   b. Request id declined
7. Security Coordinators, Supervisor and requestor are notified of outcome by security@alamo.edu
8. Request documentation is retained.

Open the current version of the Enterprise Banner Access Request as a new document. This will insure that you have an empty form and the most recent version. It may be tempting to use a stored version, but if you do be sure to verify the version numbers often. Use the tab key or mouse for easy navigation of this form.

The form will open with the cursor on the dropdown box “Select Action”: use the dropdown to select the appropriate response, “Add New Account”, “Change Existing Account”, or “Remove All Authorizations”.

1. The date field will automatically populate with the current date.
2. Last Name: Enter Last Name
3. First Name: Enter First Name
4. Middle Initial: Enter an initial or leave blank.
5. ACES/Email ID: Enter your ACES id if known; enter full email if unknown or no ACES id.
6. Banner Person ID: this is the number that you are known by in the Banner ERP System. It is a 9 digit number beginning with the number 9.
7. Location: Select your location from the drop down values.
8. Enter Department Name:
10. Phone Number: enter your phone number including area code.
11. Employee Status: Select from drop down box.
12. Effective Date: Enter a start date, this date dose not default
13. Access Termination Date: Enter the ending date for access from this account. ALL TEMPORARY EMPLOYEES MUST HAVE AN END DATE.
14. User Change Event Type: select most appropriate selection from drop down
15. User Experience in Banner: select the most appropriate selection from the drop down
16. Comments: in this text box enter any relevant facts that should be considered for example, covering during a vacation period, coverage of FMLA, additional responsibilities within the department, security class not listed on form etc.

The Banner Access Request is divided into sections by organizational unit, Payroll, HR, Finance, Student, Financial Aid and so on. Each functional area has roles associated with task within that area that must be supported. Complete this section with guidance and critical review of supervisory staff and data ownership. Keep in mind that all business segregation of duties must be observed.

Descriptions of the roles for each functional section will be found at each section:

Example:

Select the boxes to support your job function and or position changes. Retain a copy for your records to verify what selections had been made. This will be necessary until the development and implementation of workflow process for Alamo Colleges.
5. Approvals – Section 3.

The approval section is subdivided in the same way as the authorizations; additionally a supervisor section precedes each of the functional approvals.

All requests require supervisor approval. Request to “Remove All Authorizations” will require ONLY a supervisor approval. This request should be forwarded to security@alamo.edu for immediate processing.

**Supervisor Approval:** - this information is critical: 1.) insures that the next level of supervision has reviewed and approved this request 2.) provides a contact point for all questions and will prevent unnecessary delays in providing access. The details on the supervisor entry are as follows:

1. Supervisor Last Name: Enter supervisor last name
2. Supervisor First Name: Enter supervisor First Name
3. Supervisor Person ID: enter the banner person number for the supervisor, i.e.; 900012345
4. Department: Enter the Department Name

(Continued on next page)

5. Title / Position: Enter the supervisor information
6. Email: enter the significant part of the Alamo email for example, aperson@alamo.edu enter “aperson” only.
7. Telephone: Enter Telephone Number
8. Signature: Type Your Name.

Forward the completed document to the next necessary approval level depending on the selections made in Section 2. For example it is not necessary to receive Finance approval for an account requesting access to Student information only.

**Functional Role Level Approvals:**

On receipt of an “Enterprise Banner Request Form” immediately click “Forward” option in your mail client. Perform the following Steps:
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Functional Role Level Approvals: (continued)

- Open the attached document “Enterprise Banner Access Request”
- Verify that the User Identification Section (1) is sufficiently complete out.
- Review any comments entered in the comments in the Comments Text Area.
- Move to the request section of the form for your area
- Review the changes requested for this user:
- Determine based on Section 1, if this request is appropriate
- Verify that Supervisor Approval is present, if not return to sender
- To Approve the Request:
  1. Move to the appropriate signature line of the approval section.
  2. Enter your name
  3. Enter your email
  4. Enter comments – however – comments on approvals are ignored, this will be for your reference only.
  5. Save the FORM
  6. Forward to Security@alamo.edu for routing.
- To Deny the Request:
  1. Click on enter Comments
  2. Enter your comments
  3. Save the FORM
  4. Forward Security@alamo.edu for routing.

Note: An email from the appropriate approver(s) may be accepted in conjunction with a request.
6. Alamo Colleges User Responsibilities - Summary

The authorized user shall:

- Keep any account authentication information in a secure place.
- Not permit any other person to use the account for any purpose whatsoever.
- Use all necessary precautions to safeguard confidentiality of the password.
- Change the password when directed to comply with scheduled security reviews.
- Notify his supervisor, Information Technology Security Office, or District Director of Information Technology immediately if the password may have been compromised.
- Direct individuals with a formal request for information, Subpoena or Court Order to the Alamo College Legal Services Office using appropriate channels.
- Be accountable for any and all improper use of their account.
- Not use an access account and password belonging to someone else.
- Not leave the Student Information System running on any computer while not in attendance.
- Acknowledge that when no longer an employee in the current position, authorization to use the account will be terminated.
- Acknowledge that infrequent use or inactivity of an INB Banner Account for 30 days may be locked based on conditional criteria.
- In the event of employment at another college position within the Alamo Colleges, refrain from using facilities, accounts, access codes, privileges, or information for which you are not authorized in your current role.
Useful Links:

Family Educational Rights and Privacy Act of 1974 (FERPA)

Alamo Colleges Portal:
https://www.alamo.edu/district/banner-links/