INSTRUCTIONS FOR SUBMITTING A BANNER FINANCE PRIVILEGE REQUEST USING DYNAMIC FORMS
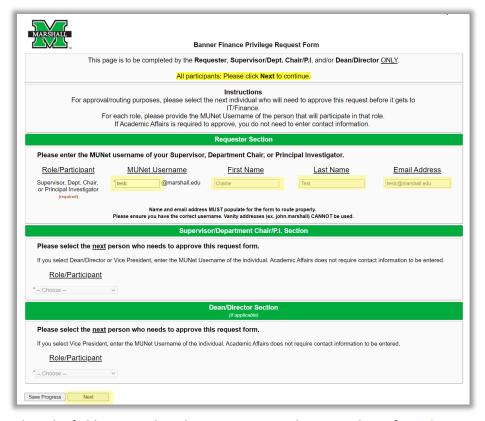
This form may be used currently for the following:
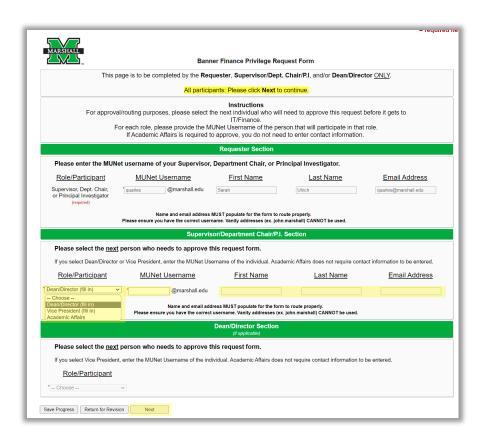
- Banner Finance Privilege Requests

REQUESTER

1. On the first page, enter the MUNET username* of your direct supervisor, department chair, or the Principal Investigator** who should approve this request. Then click Next.

   ***Your form will NOT route properly if a vanity username (ex. john.marshall) is entered. You MUST enter the MUNet username of the individual. If the Name and Email Address fields populate, the form will route properly.**

   **You must enter the correct P.I. for Chart 2 requests. If there are multiple P.I.'s, please submit a separate form for each P.I.

2. Complete the fields required on the request page. Please watch out for red text on the form, as it will guide you to enter the required information. Most of the Employee Information fields will pre-populate with your information from Banner, though some fields can be edited if inaccurate.

3. Click to sign the signature line and submit an electronic signature. Once electronically signed, click SUBMIT FORM.

SUPERVISOR/DEPARTMENT CHAIR/P.I.

1. After clicking the link in the email, you'll be taken to the first page of the form. For routing purposes, please select where the form should be directed next. Your options are Dean/Director, Vice President, or Academic Affairs. Enter the MUNET username* of the Dean/Director or VP** who should approve this request (Academic Affairs will route automatically). Then click Next.

   ***Your form will NOT route properly if a vanity username (ex. john.marshall) is entered. You MUST enter the MUNet username of the individual. If the Name and Email Address fields populate, the form will route properly.**
   **If the form needs to be approved by both the Dean/Director AND the Vice President, the Dean/Director will have the opportunity to direct the form to the Vice President. You only need to select the Dean/Director.
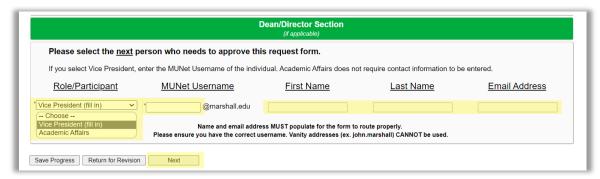

2. On the next page, click to sign the signature line associated with your role and submit an electronic signature. Once electronically signed, click SUBMIT FORM.

DEAN/DIRECTOR *(if applicable)*

1. After clicking the link in the email, you'll be taken to the first page of the form. For routing purposes, please select where the form should be directed next. Your options are Vice President or Academic Affairs. Enter the MUNET username* of the VP who should approve this request (Academic Affairs will route automatically). Then click Next.

   Your form will NOT route properly if a vanity username (ex. john.marshall) is entered. You MUST enter the MUNet username of the individual. If the Name and Email Address fields populate, the form will route properly.

2. On the next page, click to sign the signature line associated with your role and submit an electronic signature. Once electronically signed, click SUBMIT FORM.

MURC COMPLIANCE, ACADEMIC AFFAIRS, VICE PRESIDENT, IT, MURC FINANCE, and BUDGET OFFICE

1. All other participants can simply click Next on the first page. On the second page, click to sign the signature line associated with your role and submit an electronic signature. Once electronically signed, click SUBMIT FORM.

Additional Notes

SAVE PROGRESS
If you need to save your progress, click SAVE PROGRESS. To get back to it, go to MyMU.marshall.edu, click on Dynamic Forms, then go to My Forms > Pending/Draft Forms.

RETURN FOR REVISION
If at some point a mistake was made, you have the option of returning the form to any of the participants and ask them to make a change.

1. Click Return for Revision
2. Select the desired Participant in the "To" field.
3. Enter a descriptive Subject
4. In the body of the message, inform the participant of what needs changed. Be descriptive and please include your name so the participant can see who it is from.

Return For Revision

This form will be returned for revision. Please enter the content of the email that will be sent to the previous form participant(s) to prompt them to review and/or re-submit the form.

To

Initiator: Sarah Ulrich (quarles@marshall.edu)

Subject

Correction to Banner Privilege Request

Body

Hi Sarah,

Please enter John Marshall as your P.I. so that the form routes properly.

Thanks,
George

Paragraphs: 3, Characters (with HTML): 136

Return this form for revision   Cancel and return to form