



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.**

Banner Finance Privilege Request Form

This page is to be completed by the **Requester, Supervisor/Dept. Chair/P.I.**, and/or **Dean/Director ONLY**.

All participants: Please click [Next to continue](#).

Instructions
For approval/routing purposes, please select the next individual who will need to approve this request before it gets to IT/Finance.
For each role, please provide the MUNet Username of the person that will participate in that role.
If Academic Affairs is required to approve, you do not need to enter contact information.

Requester Section

Please enter the MUNet username of your Supervisor, Department Chair, or Principal Investigator.

Role/Participant	MUNet Username	First Name	Last Name	Email Address
Supervisor, Dept. Chair, or Principal Investigator <small>(required)</small>	*testc @marshall.edu	Charlie	Test	testc@marshall.edu

Name and email address **MUST** populate for the form to route properly.
Please ensure you have the correct username. Vanity addresses (ex. john.marshall) **CANNOT** be used.

Supervisor/Department Chair/P.I. Section

Please select the **next** person who needs to approve this request form.

If you select Dean/Director or Vice President, enter the MUNet Username of the individual. Academic Affairs does not require contact information to be entered.

Role/Participant

* -- Choose --

Dean/Director Section
(if applicable)

Please select the **next** person who needs to approve this request form.

If you select Vice President, enter the MUNet Username of the individual. Academic Affairs does not require contact information to be entered.

Role/Participant

* -- Choose --

[Save Progress](#) [Next](#)

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**.



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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.**

Requester Section

Please enter the MUNet username of your Supervisor, Department Chair, or Principal Investigator.

Role/Participant	MUNet Username	First Name	Last Name	Email Address
Supervisor, Dept. Chair, or Principal Investigator (required)	*quarles @marshall.edu	Sarah	Ulrich	quarles@marshall.edu

Name and email address MUST populate for the form to route properly. Please ensure you have the correct username. Vanity addresses (ex. john.marshall) CANNOT be used.

Supervisor/Department Chair/P.I. Section

Please select the next person who needs to approve this request form.

If you select Dean/Director or Vice President, enter the MUNet Username of the individual. Academic Affairs does not require contact information to be entered.

Role/Participant	MUNet Username	First Name	Last Name	Email Address
Dean/Director (fill in)	@marshall.edu			

Name and email address MUST populate for the form to route properly. Please ensure you have the correct username. Vanity addresses (ex. john.marshall) CANNOT be used.

Dean/Director Section
(if applicable)

Please select the next person who needs to approve this request form.

If you select Vice President, enter the MUNet Username of the individual. Academic Affairs does not require contact information to be entered.

Role/Participant

* -- Choose --

Save Progress Return for Revision Next

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.



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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.**

Role/Participant	MUNet Username	First Name	Last Name	Email Address
Vice President (fill in)	@marshall.edu			

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.



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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

Source | Undo | Redo | Bold | Italic | Underline | Text Color | Background Color | Bulleted List | Numbered List | Indent Left | Indent Right | Styles | Format | Arial | 13px | Font Color | Background Color

Hi Sarah,

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

Thanks,
George

Paragraphs: 3, Characters (with HTML): 136