Now that you have completed Banner Basic Navigation training, you may apply for "privileges" to access any or all of the following information systems . . .

BANNER GENERAL PERSON ENTRY

- Banner General Person Entry training needed to view/edit records in Banner. There are two levels of access.
  - View/Edit – With this access, the training is required. You will register for the training at http://www.marshall.edu/human-resources/training/training-schedule/. You will then fill out the permission form at http://www.marshall.edu/banner/RequestForms/BannerGPETrainingRequestForm.pdf and check the first box. You will then take the form to the training with you and your trainer will sign stating that you have completed training.
  - GOAMTCH - This is a special privilege and should only be checked if your position is responsible for creating new MU ID's. This privilege **must** be approved by the Banner Oversight Committee (BOC). You will register for the training at http://www.marshall.edu/human-resources/training/training-schedule/. You will fill out the permission form at http://www.marshall.edu/banner/RequestForms/BannerGPETrainingRequestForm.pdf and check the second box and send it to David Daniel at daniel6@marshall.edu. Do not attend training until you have received confirmation that your permission has been approved. You will then take the form to the training with you and your trainer will sign stating that you have completed training.

BANNER FINANCE

- Complete and submit the Banner Finance Privilege Request Form to Computing Services ***if***

  - you will view the tracking of items requested for purchase, accounting information, or budget information in Banner MU or MURC Finance. Complete the *Document Inquiry* section of the Processes form with your supervisor's written approval. This form is available at: http://www.marshall.edu/finance/forms/

  - you will enter purchase requisitions and encumbrances in Banner MU or MURC Finance. Complete the *Document Entry* section of the Processes form with your supervisor's written approval. This form is available at: http://www.marshall.edu/finance/forms/

  - you will electronically approve requisitions in Banner MU or MURC Finance. Complete the appropriate fields in the Processes section and the Electronic Approvals section with your supervisor's written approval. This form is also available at: http://www.marshall.edu/finance/forms/.

- When you are notified that a new fund and/or organization code has been assigned to your department by Accounting, you must contact the Accounting Office at 696-6520 to obtain access. Until then, you will not be able to enter or query documents in Banner Finance against that fund and org. If you will approve requisitions against a new organization code, resubmit the form with the new organization code along with your supervisor's written approval to Juanita Parsons in Accounts Payable & Payroll. Please include your Banner username with any request.

- If you will use a State credit card to purchase goods and services, contact Accounts Payable at 696-6520 for training.

- If you will use Marshall University Research Corporation (MURC) funds to purchase equipment and supplies for your department, contact MURC's Business Office at 696-2829 for training.

- Once you have gained access to the Banner MU or MURC Finance Module, you may want to consider the following training options:

  - Banner On-Line Inquiry & Data Extract This workshop is designed to teach the Banner user the basic on-line forms available for retrieving financial information and for researching financial transactions for their individual department. Data Extract will also be reviewed. To register for training, go to http://muwww-new.marshall.edu/human-resources/training/training-schedule/

  - Banner™ Budgeting Overview which provides a budgeting overview; allocation budgeting overview; personal services budgeting; introduction to various Banner budget screens; and a question/answer session. It will not address grant budgeting. To register for training, http://muwww-new.marshall.edu/human-resources/training/training-schedule/

BANNER HR (HUMAN RESOURCES)

- Complete and submit the Banner HR Privileges Request Form to Computing Services with your responsible supervisor's written signature ***if***

  - you will need access to employee, job, or position information, such as reviewing employee status, I-9 completion, job information, and position budget. The form can be found at http://www.marshall.edu/human-resources/forms/

  - you will electronically initiate and/or approve position action forms (EPAF) in Banner HR. Check the "request" column for Process Electronic Personnel Action Forms (EPAF). The form can be found at http://www.marshall.edu/human-resources/forms/HR-SERV-FORM-12.pdf

- The Banner HR package makes available at the authorized user's desktop important information for his/her assigned budgetary organization.

- Once you have gained access to Banner HR, you should participate in a Banner HR Introduction training sessions which are offered monthly by Human Resource Services. Register for the class at: http://muwww-new.marshall.edu/human-resources/training/training-schedule/

BANNER STUDENT

- Ask your supervisor to e-mail David Daniel (daniel6@marshall.edu) to request access to Student module forms ***if***

  - you need to update student information in the database. If possible, your supervisor should request that an employee's privileges be patterned after another employee's privileges. If that is not possible, the specific forms should be indicated in the e-mail message. There are some "classes" of forms that have been created for various functions such as entering Admissions applications, Prospect data, Block Scheduling. Supervisors have been notified of the existence of the "classes" of forms, and privileges should be requested to the specific class. An employee may be granted a combination of Query and Update access to various

forms so your supervisor should specify the type of privileges requested.

- you only need to query student information such as addresses, college, major. Your supervisor should request Query-Only (view) access to the Dean's Menu. If you need to query additional forms not included on the Dean's Menu, those forms should be included in the request.

- Faculty members will automatically be granted Query-Only (view) access to the Dean's Menu.

- If you need to create new "Person" records, register for General Person Entry training at http://muwww-new.marshall.edu/human-resources/training/training-schedule/

- Training for Banner Student is done by individual departments.

For more Information on Banner Forms, click the following link to view SunGard Banner documentation (http://www.marshall.edu/banner/BANNERMANUALS.HTM). A Marshall MUINFO account is required to access documentation.