

Banner HR Account Request Process

Workflow for adding/updating/removing Banner Security Roles

Banner HR Account Request System Login and Usage:

Login as you always have. The screen looks almost the same as it used to except for some new features added to the 'Links & Instructions' section on the left. These additions are highlighted by the *New!* designation following the added functionality.

Workflow changes – overview:

The process of Adding, Editing, or Removing security roles to individuals has been greatly simplified. The Workflow path is identical for each of the three change processes as follows:

- To Add, Edit or Remove one or more security roles the requester submits an Account Request Change ticket for the employee they would like to change roles on.
- Next the employee receives an automated email notifying them that the request has been submitted to change their role(s.)
- If the requester who submitted the ticket is a supervisor the request goes directly to Campus HR for approval. If the requester is not a supervisor the request goes to the employee's supervisor for approval.
- Once the supervisor approves it, the request moves to the Campus HR for final approval.
- When HR approves the request there's an automated check to see if the employee has signed the 'Banner HR Security Agreement' document within the last year. If not they are asked to sign it electronically.
- Once a signed agreement exists the request moves to IT Accounts who create a Banner HR Account, if one doesn't already exist for the employee, then the process progresses to the USNH HR department to update PTRUSER and PSAORGN.
- At this point the Employee, Requester and Supervisor are notified that the request has been completed and the ticket is closed.

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Detailed description of options:

Adding Security Roles

Log into the UNH IT Accounts Management System. The Home screen will show three large options in bold colors in the center of the screen: Add, Edit, and Remove.

Click on Add. A menu will appear beneath the Add button with two sub-groups: ‘Employee Resources’ and ‘USNH Sponsored Resources.’ Under the heading ‘Employee Resources’ there are three categories: ‘Request Access for an Employee’ (other than yourself,) ‘Request Access for Yourself,’ and ‘Request a Pool, Secondary, or Service Account.’ Under ‘USNH Sponsored Resources’ there are two categories: ‘New Sponsored User: USNH’ and ‘Group Sponsorship Request.’

Create Access to IT Resources

Employee Resources

Request Access for an Employee

To request access to accounts for another UNH/USNH employee.

Request Access for Yourself

To request accounts for yourself.

Request a Pool, Secondary, or Service Account

This form is used to request Pool, Secondary, or Service accounts. For more information about Pool, Secondary, and Service accounts visit www.accounts.unh.edu

USNH Sponsored Resources

New Sponsored User: USNH

To request access to accounts for non-USNH persons with business at the University Systems Office.

Group Sponsorship Request

To request access to accounts for a group of non-USNH staff with business at the University Systems Office.

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The basic procedure is the same for each. For this example let's choose 'Request Access for an Employee' from the 'Employee Resources' list. Clicking on the link takes you to a screen titled:

Step 1. Verify Your Information.

UNH Home UNH IT Home IT Accounts Home Approval Login

Request Overview

Type: Add to Existing Employee

Steps Left

- 1 **Confirm Your Info**
- 2 Employee's Info
- 3 Select Services
- 4 Access Details
- 5 Confirm Request

 Save Session

 Cancel Request

Step 1. Verify Your Information

Please verify your information below. **Bold fields** are required.

Username	<input type="text" value="xxxxxxx"/>
Name	<input type="text" value="Xxxxx"/> <input type="text" value="Xxxxxxx"/>
Email	<input type="text" value="xxxx@usnh.edu"/> <input type="text" value="xxxx@usnh.edu"/>
Phone Number	<input type="text" value="XXX-XXX-XXXX"/>
Campus	<input type="text" value="USNH"/>
Affiliation	<input type="text" value="Staff"/>
Department	<input type="text" value="USNH-HR"/>

Check to make sure all information is there and correct. Click the 'Next' button on the far right.

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Step 2. Enter Employee's Information

UNH Home UNH IT Home IT Accounts Home Approval Login

Request Overview

Type: Add to Existing Employee

Steps Left

- 1 Confirm Your Info
- 2 Employee's Info**
- 3 Select Services
- 4 Access Details
- 5 Confirm Request

Save Session

Cancel Request

For help call the UNH IT Service Desk at 862-4242
Hours: (M-F) 7:30 AM - 5:00 PM
Feedback: [Click Here](#)

Step 2. Enter Employee's Information

Optional: Enter employee's Username or ID Number to verify employment status and/or to autofill fields below:

Username

ID Number

Find Employee Info

Please enter Employee's information below. **Bold fields** are required.

Username

Name

Email

Phone Number

Campus

Affiliation

Department

Enter the employee's Username or ID Number in the upper box then click 'Find Employee Info.'

Below their information section is another section titled: 'Supervisor Information.' The Supervisor information should default into the fields. You can override this information if it is inaccurate. If no information is provided and you are the employees supervisor check the box titled "Check if you are this employee's Supervisor, otherwise enter the appropriate information." Click 'Next' when done.

Supervisor Information

Check if you are this employee's Supervisor, otherwise enter the information below.

Supervisor Name

Supervisor Email

Supervisor Phone

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Next

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Step 3. Select Required Services

UNH Home UNH IT Home IT Accounts Home Approval Login

Request Overview
 Type: Add to Existing Employee
 User: Amanda Riecks-Kurshinsky

Step 3. Select Required Services Welcome, **Logout**

Please select at least one Service and Account.

Steps Left

- 1 Confirm Your Info
- 2 Employee's Info
- 3 **Select Services**
- 4 Access Details
- 5 Confirm Request

Save Session
Cancel Request

For help call the UNH IT Service Desk at 862-4242
 Hours: (M-F) 7:30 AM - 5:00 PM
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Communication and Collaboration
 AD/VPN , Outlook Exchange E-mail , Fileshare Services , UNH Sharepoint , Website Access , USNH Document Imaging (Xtender): General Counsel

Financial Administration
 Banner Finance , Webl: Finance , Unimarket , Document Imaging (Xtender): Finance , Application Manager (AppMan): Finance , User Content Repository (UCR): Finance , File Transfer System (FTS): Finance , ID Lookup Tool

Human Resources
 Banner HR , Webl: HR , Document Imaging (Xtender): HR , Web Time Entry , Leave Reporting , Application Manager (AppMan): HR , User Content Repository (UCR): HR , Kronos , File Transfer System (FTS): HR , ID Lookup Tool

ITSM
 UNH ITSM - BMC Remedy

Back **Next**

Under this we have four choices: Communication and Collaboration, Financial Administration, Human Resources, and ITSM. For this example choose 'Human Resources.' A sub-menu appears. Select 'Banner HR' then click 'Next.'

Human Resources

Banner HR , Webl: HR , Document Imaging (Xtender): HR , Web Time Entry , Leave Reporting , Application File Transfer System (FTS): HR , ID Lookup Tool

Banner HR: Banner HR is the employee management systems database for USNH, incl etc.

Webl: HR: WebIntelligence (Webl) is the end-user tool used as a reporting solution for E

Document Imaging (Xtender): HR: Xtender: HR is a document management solutio of paper while increasing productivity by streamlining the capture and management of doc

Web Time Entry: Web Time Entry allows supervisors to approve time sheets online thr

Leave Reporting: Leave Reporting allows supervisors to approve exempt employee lea Employees (WISE).

Application Manager (AppMan): HR: Application Manager is a GUI-based distribute systems and then retrieve-to-display listings and log files to a centralized web server/GUI.

User Content Repository (UCR): HR: UCR is a common content repository for stora processes. This central storage provides redundant service for high availability.

Kronos: Kronos is the timekeeping software used by adjunct employees.

File Transfer System (FTS): HR: FTS is a Service for file transfers of feed data to an

ID Lookup Tool: Common ID Lookup tool for the University System of New Hampshire.

Banner HR Account Request Process

Workflow for adding/updating/removing Banner Security Roles

Step 4. Access Details

Banner HR screen

If the employee already has Banner HR it will say “**Modify Banner HR Account:** There is an existing Banner HR account for this user” and it will list the current security Roles already assigned to this employee. If the user does not yet have a Banner HR Account, you can choose from a list of existing users to model this new users security roles after. If you choose this option you can then add or remove individual roles as well. For our example the user already has a Banner account.

In the ‘Add User Roles’ section choose the Roles that you want to add by selecting one and then hitting the ‘Add’ button below, repeating until you have all the roles you want.

Add User Roles

Please select the appropriate user roles based on the business functions that this user the form should not be used unless the new user requires additional roles not held by ti available role.

BSC Assistant	▲
BSC Manager	
Campus Benefits Specialist	☰
Campus Compensation Specialist	
Campus Faculty Maintenance	
Campus HR Feeds	
Campus HR Generalist	
Campus Payroll Specialist	
Central Position Budget Development	
Compensation Administrator	
Department Position Budget Development	
Department Time Entry	▼

↓ Add ↓

Banner HR Account Request Process

Workflow for adding/updating/removing Banner Security Roles

Move on to the 'Approval Levels' section below the Add User Roles section and select the appropriate Approval Levels. Hit the Add button for each Approval Level as with the User Roles above.

Approval Levels

If this user will be required to approve EAPF or Compensation transactions, select the approval levels selected. The [Approval Level Descriptions](#) document provides

BSCAST BSCMAN CAMBUD CAMCFO CAMHRA CAMHRO CAMPAY CC_APP CC_DEA CC_DIR CENOSR DIRDEP	▲ ≡ ▼
↓ Add ↓	

Below that is the 'Org Access' section. Select Master Org Access Needed 'Yes' or 'No.' If 'No' then select the Orgs needed, either individually, or in a range. To do so click the magnifying glass to the right of the 'From' box and choose an Org code. You can also choose a range of Orgs (in alphabetic order) by filling in the 'From' and 'To' boxes. Click 'Next' when finished.

Org Access

Please indicate all Orgs this user will need to access to view or update data. You may provide a range of Orgs field and the highest value in the **To:** field. For example **From: K00PPB To: KXXXXX** would give access to all fields should be the same value. If they require multiple orgs that are not in a range you can add multiple rows

Master Org Access Yes No
Needed?

Select up to 3

From:	<input type="text"/>	<input type="text"/>	To:	<input type="text"/>
From:	<input type="text"/>	<input type="text"/>	To:	<input type="text"/>
From:	<input type="text"/>	<input type="text"/>	To:	<input type="text"/>

Banner HR Account Request Process

Workflow for adding/updating/removing Banner Security Roles

Step 5. Confirm Request

Confirm the information then click the 'Submit Account Requests' button at the bottom when ready.

Completing the request:

- At this point emails will be sent to the employee who's receiving the security role changes along with an email to the requester and to the employee's supervisor if his or her supervisor was *not* the requester. Note: the supervisor is asked to approve the request if they were *not* the one who submitted the request.
- There's an automated check to see if the employee has signed the 'Banner HR Security Agreement' document within the last year. If not, an email is sent asking them to sign it electronically.
- Once the supervisor approves the request and a signed agreement exists the request is routed to Campus HR for final approval.
- When HR approves the request the request moves to IT Accounts and they will create a Banner HR Account, if one doesn't already exist for the employee.
- The process progresses to the USNH HR department to update PTRUSER and PSAORGN.
- At this point the Employee, Requester and Supervisor are notified that the request has been completed and the ticket is closed.

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Editing Existing Security Roles

From the UNH IT Accounts Management System home screen click the center Edit button. This will bring up a submenu below. Under ‘Employee Resources’ there are three choices: Modify Access for an Employee, Modify Access for Yourself, and IT Account Modification Form. To the right is ‘USNH Sponsored Resources’ with one choice: Renew Sponsored User. As an example, click on ‘Modify Access for an Employee.’ From this point on the procedure and screen flow is identical to the ‘Add’ example above:

The screenshot displays the UNH IT Accounts Management System interface. At the top, there are navigation links: UNH Home, UNH IT Home, IT Accounts Home, and Approval Login. A 'Links & Instructions' sidebar on the left lists various user actions like 'Return Home', 'View My Account Access', and 'Request Access to Password/Confidential Information'. The main content area is titled 'UNH IT Accounts Management System' and includes a 'Welcome, Logout' message. Three prominent buttons are shown: a green '+ Add' button for requesting access, an orange 'Edit' button for modifying or renewing access, and a red 'Remove' button for removing access. Below these are sections for 'Change Accounts/Access', 'Employee Resources' (containing 'Modify Access for an Employee', 'Modify Access for Yourself', and 'IT Account Modification Form'), and 'USNH Sponsored Resources' (containing 'Renew Sponsored User').

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Workflow for adding/updating/removing Banner Security Roles

Step 1. Verify Your Information.

UNH Home UNH IT Home IT Accounts Home Approval Login

Request Overview

Type: Add to Existing Employee

Steps Left

- 1** Confirm Your Info
- 2 Employee's Info
- 3 Select Services
- 4 Access Details
- 5 Confirm Request

 Save Session

 Cancel Request

Step 1. Verify Your Information

Please verify your information below. **Bold fields** are required.

Username	<input type="text" value="xxxxxxx"/>
Name	<input type="text" value="Xxxxx"/> <input type="text" value="Xxxxxxx"/>
Email	<input type="text" value="xxxx@usnh.edu"/> <input type="text" value="xxxx@usnh.edu"/>
Phone Number	<input type="text" value="XXX-XXX-XXXX"/>
Campus	<input type="text" value="USNH"/>
Affiliation	<input type="text" value="Staff"/>
Department	<input type="text" value="USNH-HR"/>

Check to make sure all information is there and correct. Click the 'Next' button on the far right.

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Step 2. Enter Employee's Information

If you know the employee's Username or ID Number enter it in the upper (Optional) box then click 'Find Employee Info.' Otherwise, fill in all the employee's information.

UNH Home UNH IT Home IT Accounts Home Approval Login

Request Overview
Type: Add to Existing Employee

Steps Left

- 1 Confirm Your Info
- 2 Employee's Info**
- 3 Select Services
- 4 Access Details
- 5 Confirm Request

Save Session

Cancel Request

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Hours: (M-F) 7:30 AM - 5:00 PM
Feedback: [Click Here](#)

Step 2. Enter Employee's Information

Optional: Enter employee's Username or ID Number to verify employment status and/or to autofill fields below.

Username

ID Number

Find Employee Info

Please enter Employee's information below. **Bold fields** are required.

Username

Name

Email

Phone Number

Campus

Affiliation

Department

Enter the employee's Username or ID Number in the upper box then click 'Find Employee Info.'

Below their information section is another section titled: 'Supervisor Information.' The Supervisor information should default into the fields. You can override this information if it is inaccurate. If no information is provided and you are the employees supervisor check the box titled "Check if you are this employee's Supervisor, otherwise enter the appropriate information." Click 'Next' when done.

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Step 3. Select Required Services

Under this we have four choices: Communication and Collaboration, Financial Administration, Human Resources, and ITSM. For this example choose 'Human Resources.' A sub-menu appears. Select 'Banner HR' then click 'Next.'

UNH Home UNH IT Home IT Accounts Home Approval Login

Request Overview
 Type: Add to Existing Employee
 User: Amanda Riecks-Kurshinsky

Step 3. Select Required Services Welcome, Logout

Please select at least one Service and Account.

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 AD/VPN , Outlook Exchange E-mail , Fileshare Services , UNH Sharepoint , Website Access , USNH Document Imaging (Xtender): General Counsel

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 Banner Finance , WebI: Finance , Unimarket , Document Imaging (Xtender): Finance , Application Manager (AppMan): Finance , User Content Repository (UCR): Finance , File Transfer System (FTS): Finance , ID Lookup Tool

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Steps Left

- 1 Confirm Your Info
- 2 Employee's Info
- 3 Select Services
- 4 Access Details
- 5 Confirm Request

Save Session Cancel Request

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Step 4. Access Details

Banner HR screen

If the employee already has Banner HR it will say “**Modify Banner HR Account:** There is an existing Banner HR account for this user” and it will list the current security Roles already assigned to this employee. If the user does not yet have a Banner HR Account, you can choose from a list of existing users to model this new users security roles after. If you choose this option you can then add or remove individual roles as well. For our example the user already has a Banner account. In the case of an existing Banner account, the list of existing roles is displayed first:

Role	ORG High	ORG Low	Remove Access?
Banner Broadcast Message	N/A	N/A	<input type="checkbox"/>
PHAREDS - Payroll Redistribution	N/A	N/A	<input type="checkbox"/>
Service Desk WISE PIN Reset	N/A	N/A	<input type="checkbox"/>
USNH HRIS	N/A	N/A	<input type="checkbox"/>

To remove access to an existing security role: click the box at the right of the role you'd like to remove.

To add security roles: in the 'Add User Roles' section choose the Roles that you want to add by selecting one and then hitting the 'Add' button below, repeating until you have all the roles you want.

Add User Roles

Please select the appropriate user roles based on the business functions that this user the form should not be used unless the new user requires additional roles not held by tl available role.

- BSC Assistant
- BSC Manager
- Campus Benefits Specialist
- Campus Compensation Specialist
- Campus Faculty Maintenance
- Campus HR Feeds
- Campus HR Generalist
- Campus Payroll Specialist
- Central Position Budget Development
- Compensation Administrator
- Department Position Budget Development
- Department Time Entry

↓ Add ↓

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Workflow for adding/updating/removing Banner Security Roles

Move on to the 'Approval Levels' section below the Add User Roles section and select the appropriate Approval Levels. Hit the Add button for each Approval Level as with the User Roles above.

Approval Levels

If this user will be required to approve EAPF or Compensation transactions, select the approval levels selected. The [Approval Level Descriptions](#) document provides

BSCAST BSCMAN CAMBUD CAMCFO CAMHRA CAMHRO CAMPAY CC_APP CC_DEA CC_DIR CENOSR DIRDEP	▲ ≡ ▼
↓ Add ↓	

Below that is the 'Org Access' section. Select Master Org Access Needed 'Yes' or 'No.' If 'No' then select the Orgs needed, either individually, or in a range. To do so click the magnifying glass to the right of the 'From' box and choose an Org code. You can also choose a range of Orgs (in alphabetic order) by filling in the 'From' and 'To' boxes. Click 'Next' when finished.

Org Access

Please indicate all Orgs this user will need to access to view or update data. You may provide a range of Orgs field and the highest value in the **To:** field. For example **From: K00PPB To: KXXXXX** would give access to all fields should be the same value. If they require multiple orgs that are not in a range you can add multiple rows

Master Org Access Yes No
Needed?

Select up to 3

From:	<input type="text"/>	🔍	To:	<input type="text"/>	🔍
From:	<input type="text"/>	🔍	To:	<input type="text"/>	🔍
From:	<input type="text"/>	🔍	To:	<input type="text"/>	🔍

Banner HR Account Request Process

Workflow for adding/updating/removing Banner Security Roles

Step 5. Confirm Request

Confirm the information then click the 'Submit Account Requests' button at the bottom when ready.

Completing the request:

- At this point emails will be sent to the employee who's receiving the security role changes along with an email to the requester and to the employee's supervisor if his or her supervisor was *not* the requester. Note: the supervisor is asked to approve the request if they were *not* the one who submitted the request.
- There's an automated check to see if the employee has signed the 'Banner HR Security Agreement' document within the last year. If not, an email is sent asking them to sign it electronically.
- Once the supervisor approves the request and a signed agreement exists the request is routed to Campus HR for final approval.
- When HR approves the request the request moves to IT Accounts and they will create a Banner HR Account, if one doesn't already exist for the employee.
- The process progresses to the USNH HR department to update PTRUSER and PSAORGN.
- At this point the Employee, Requester and Supervisor are notified that the request has been completed and the ticket is closed.

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Remove Access

From the UNH IT Accounts Management System home screen click the Remove button on the right.

UNH IT Accounts Management System

Logout



Remove Access to IT Resources

Immediate Deactivation of Access

To immediately terminate access to IT resources in the event of a security risk. [Click here for Details on Account Deactivation.](#)

Revoke Sponsorship Status and IT Access

To terminate Sponsored User status prior to the requested end date.

Remove Access to Unused IT Resource

To remove unnecessary/unused access to an IT resource.

Schedule the Termination of IT Access

To schedule the removal of access to IT resources.

This opens a submenu below with the following options: Immediate Deactivation of Access, Revoke Sponsorship Status and IT Access, Remove Access to Unused IT Resource, and lastly Schedule the Termination of IT Access. These are all similar in terms of procedure and screen flow so let's run through the 'Remove Access of Unused IT Resource' as an example. Click on 'Remove Access to Unused IT Resource.' Fill out/verify the Requester's Information block and make sure the Request Type below is set to 'Remove Access to unused IT Resource.'

Request Type

Please specify the type of request you would like to submit.

Please specify details in the **Additional Information** field below.

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Next in the 'Account Holder's Information' block you can choose: Specify User, Change my own Account Access, or Specify Multiple Users.

Account Holder's Information

Please enter the account holder's information of the individual whose access you should like to change, or

- Specify User
 Change my own Account Access
 Specify Multiple Users

Username [Find](#)

Name

E-mail

Phone Number

Affiliation ▼

Department

For our example choose 'Specify User.' If you know the username of the employee, enter it and this will fill in the user information for you, otherwise, fill in all the account holder's info. In this case the 'Additional Information' block is required.

Additional Information

Please enter details about this request. **This field is required**

To expedite this request make sure to provide as much detail as possible, including but not limited to: (1) specific accounts and access to be changed, (2) reason for change, (3) your relationship with the account holder, (4) date when change in access should take effect.

In high priority requests, IT Account Administrators will contact the requestor within a couple of hours on a business day. All other requests will be responded to within one business day.

Submit

Add as much detail as you can. This should include 1) specific accounts and access to be changed, 2) reason for change, 3) your relationship to the employee (ex: Manager,) and 4) the date when the change in access should take effect. Also mention if this is a high priority request. Click the 'Submit' button. As before the requester, supervisor (if not the requester) and the employee will get an email, detailing the actions requested. If all needed info is included then HR/IT will remove the security roles for the individual.