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:

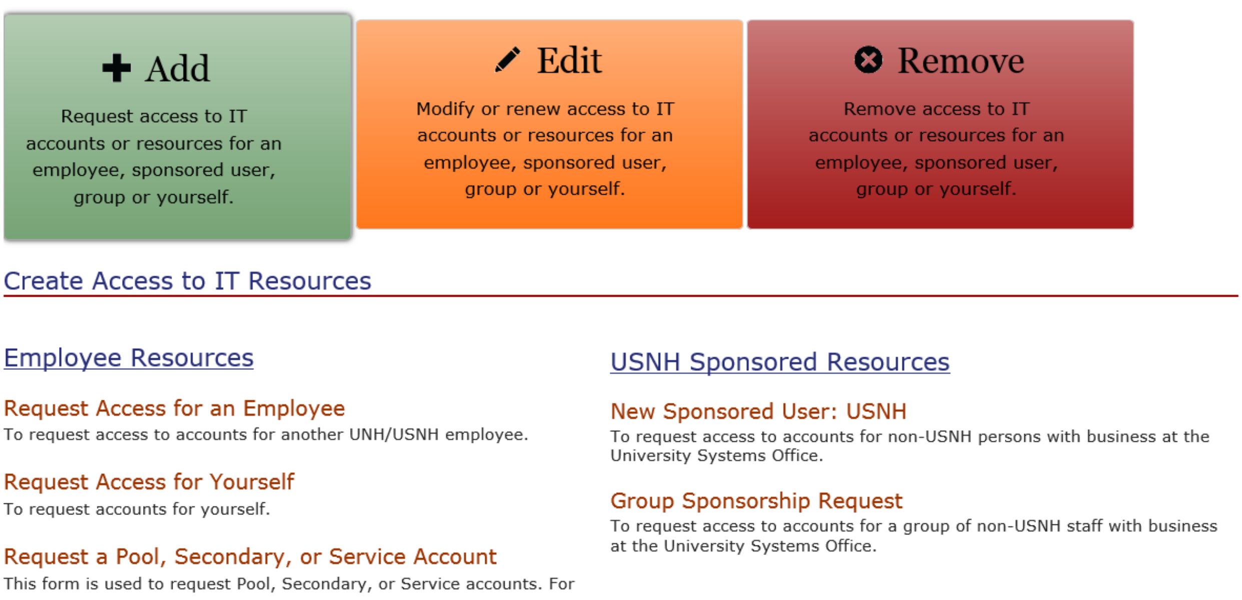
- To Add, Edit or Remove one or more security roles the requester submits an Account Request Change ticket for the employee they would like to change roles on.
- Next the employee receives an automated email notifying them that the request has been submitted to change their role(s.)
- If the requester 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.

<u>Detailed description of options:</u>

Adding Security Roles

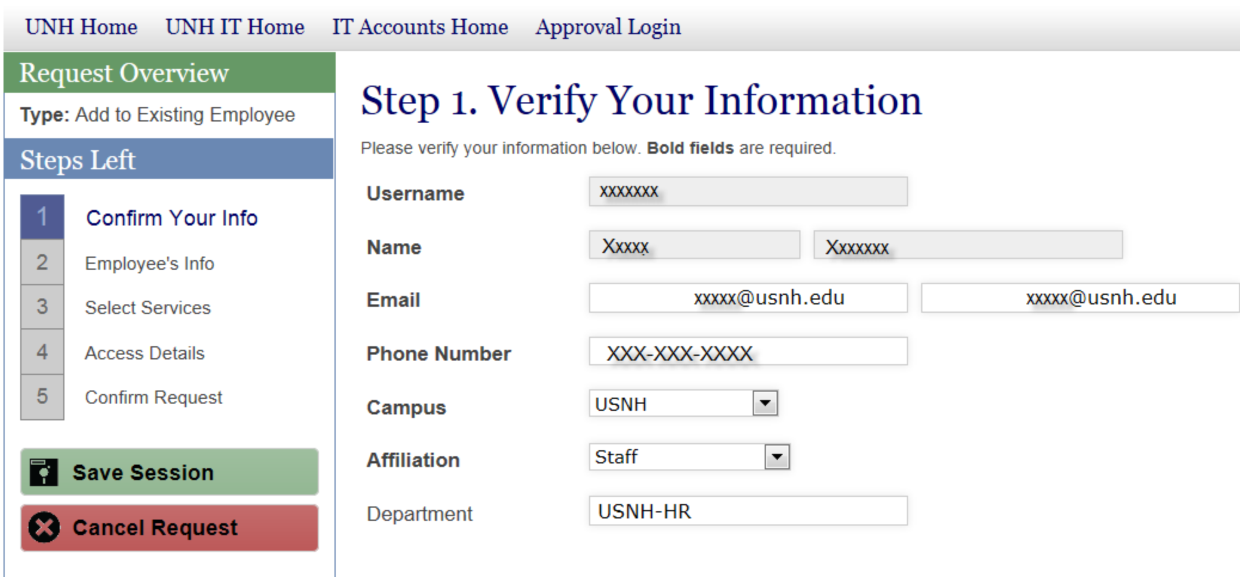
Log into the UNH IT Accounts Management System. The Home screen will show three large options in bold colors in the center or the screen: Add, Edit, and Remove.

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.'



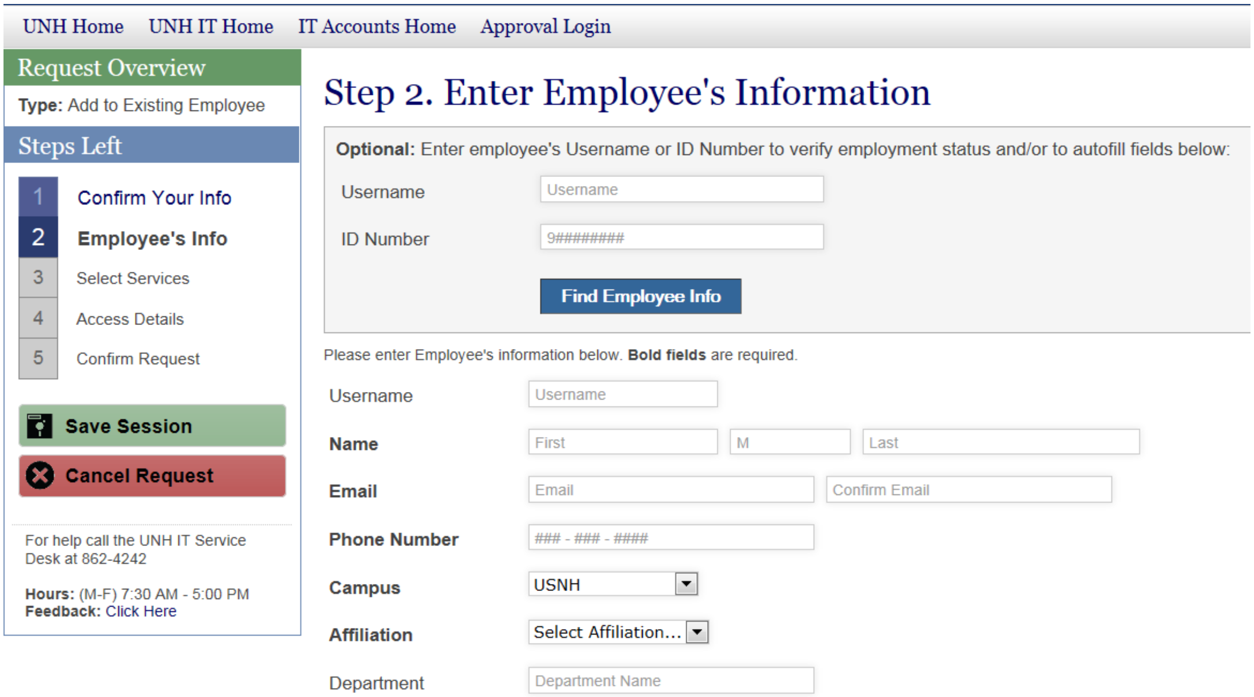
The basic procedure is the same for each. For this example lets choose 'Request Access for an Employee' from the 'Employee Resources' list. Clicking on the link takes you to a screen titled:

Step 1. Verify Your Information.



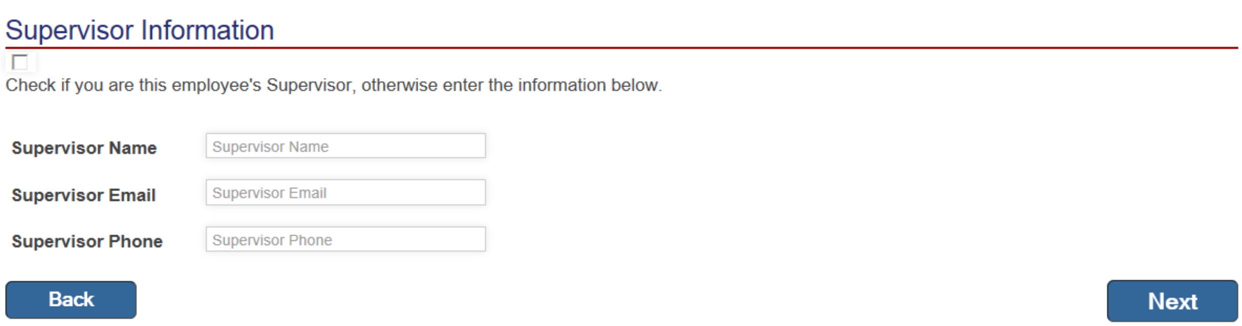
Check to make sure all information is there and correct. Click the 'Next' button on the far right.

Step 2. Enter Employee's Information



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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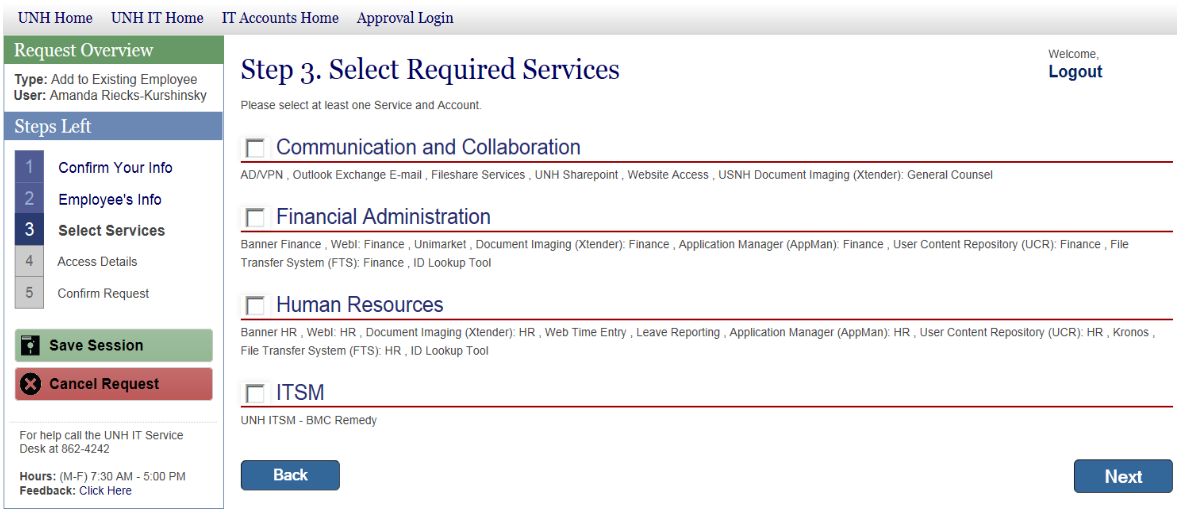
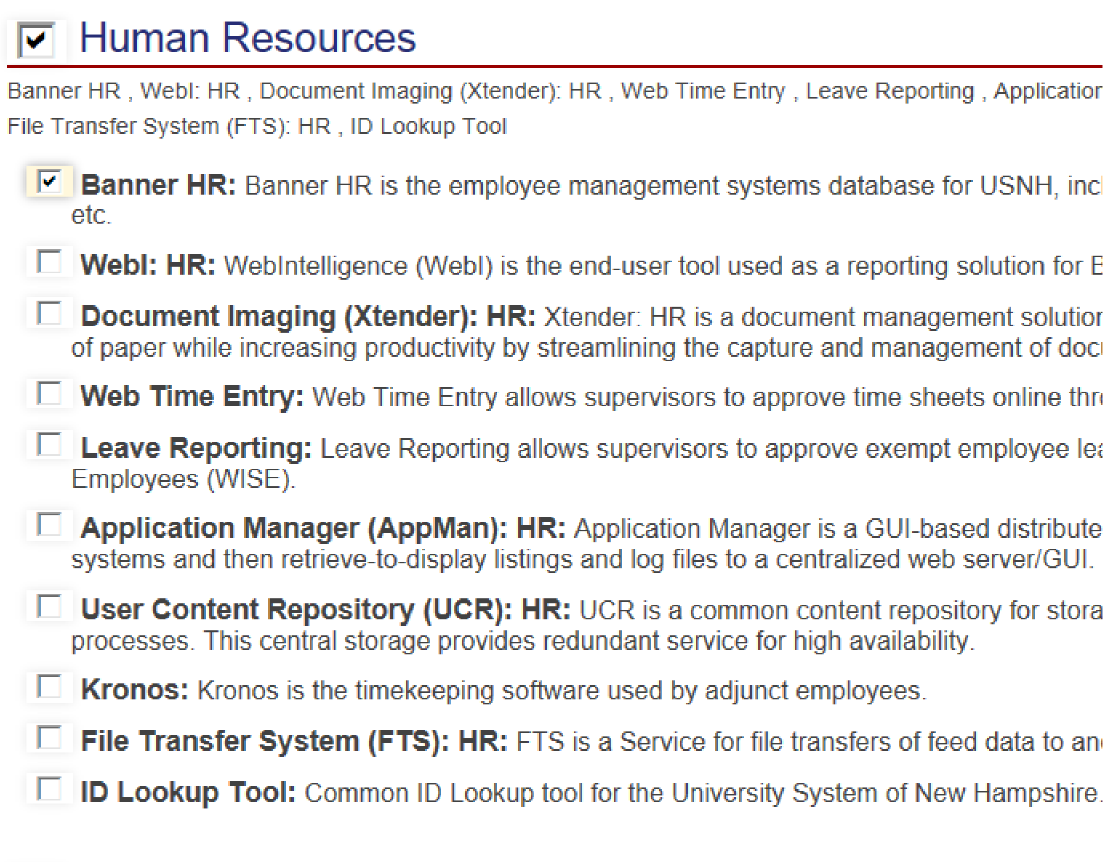
Step 3. Select Required Services



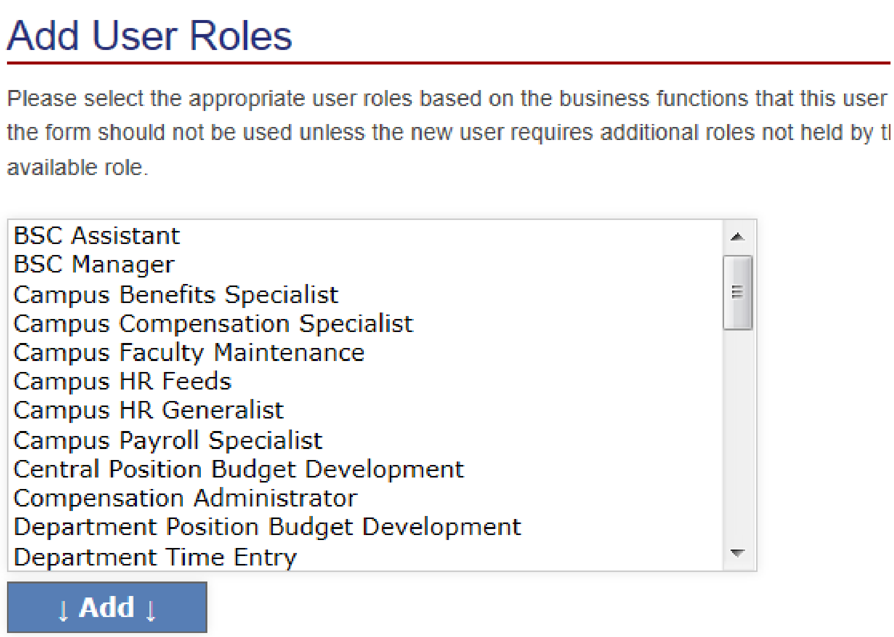
Under this we have four choices: Communication and Collaboration, Financial Administration, Human Resources, and ITSM. For this example choose 'Human Resources.' A sub-menu appears. Select 'Banner HR' then click 'Next.'



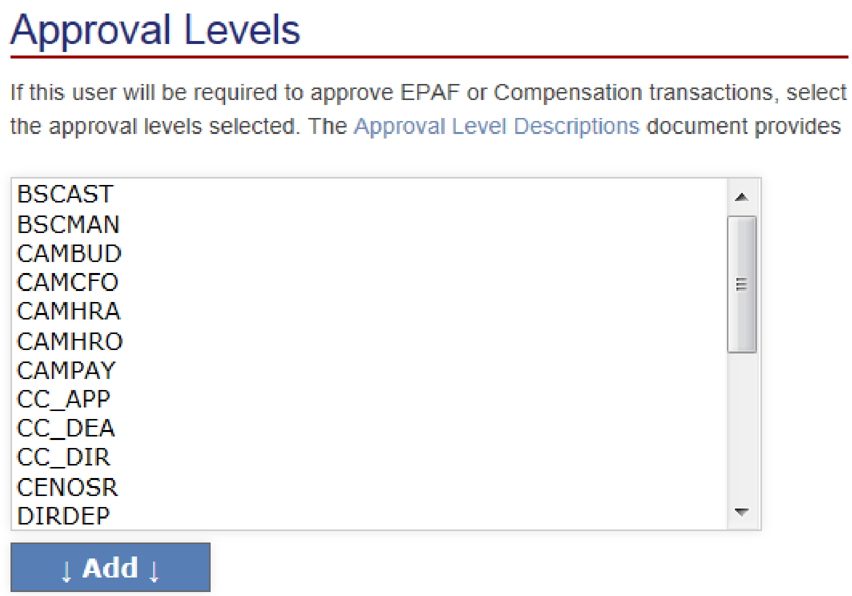
Step 4. Access Details

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.

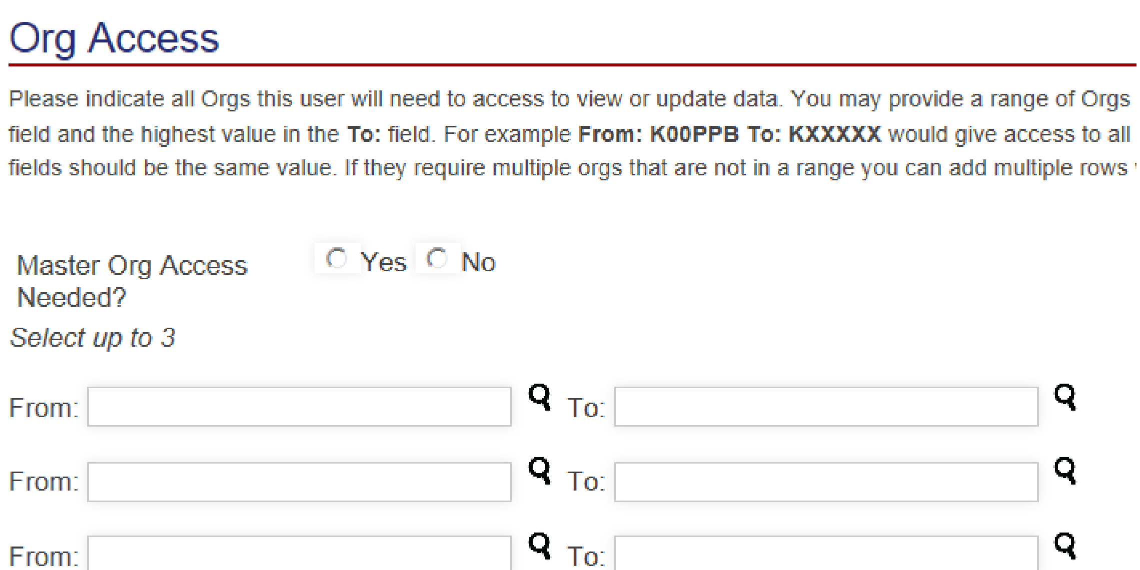
In the 'Add User Roles' section choose the Roles that you want to add by selecting one and then hitting the 'Add' button below, repeating until you have all the roles you want.



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.



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.



Step 5. Confirm Request

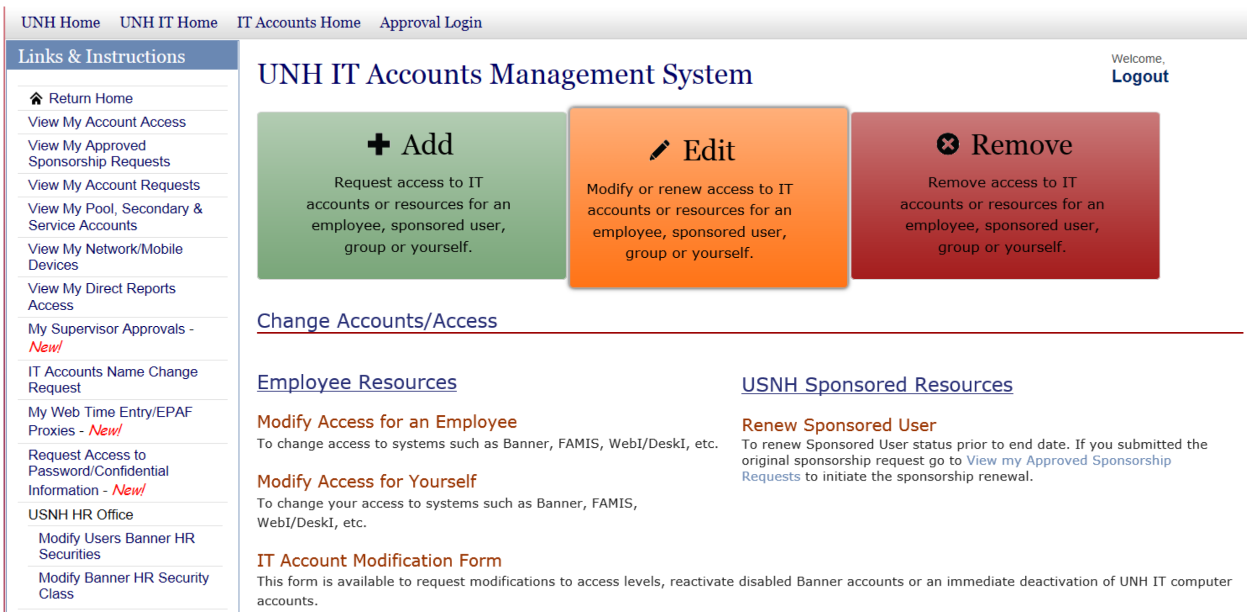
Confirm the information then click the 'Submit Account Requests' button at the bottom when ready.

Completing the request:

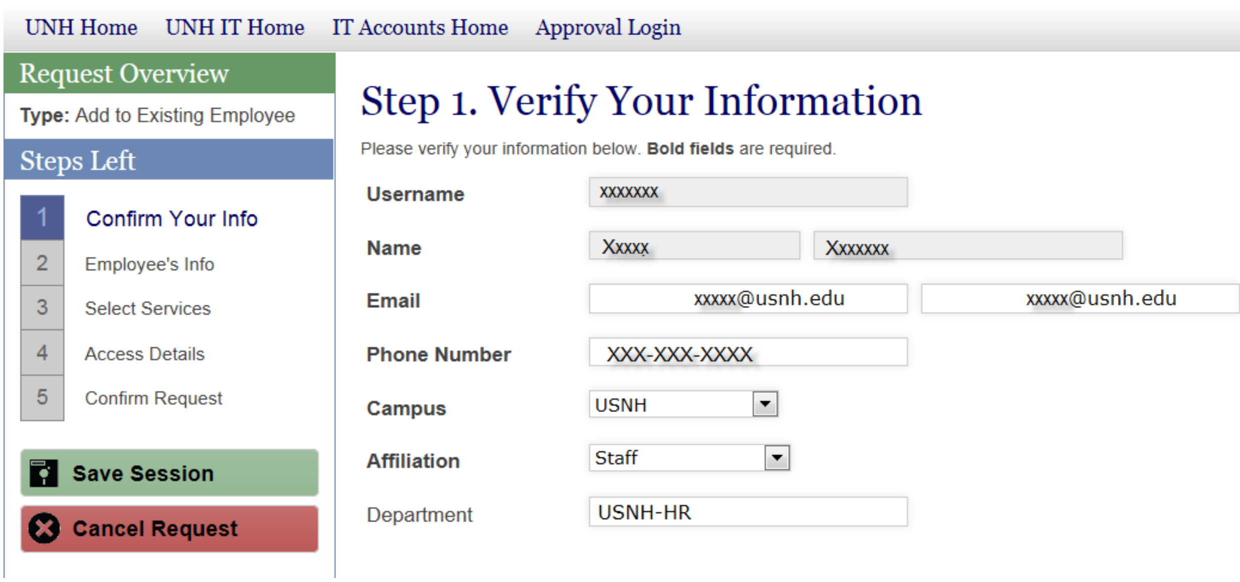
- At this point emails will be sent to the employee who's receiving the security role changes along with an email to the requester and to the employee's supervisor if his or her supervisor was ***not*** the requester. Note: the supervisor is asked to approve the request if they were ***not*** the one 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.

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:



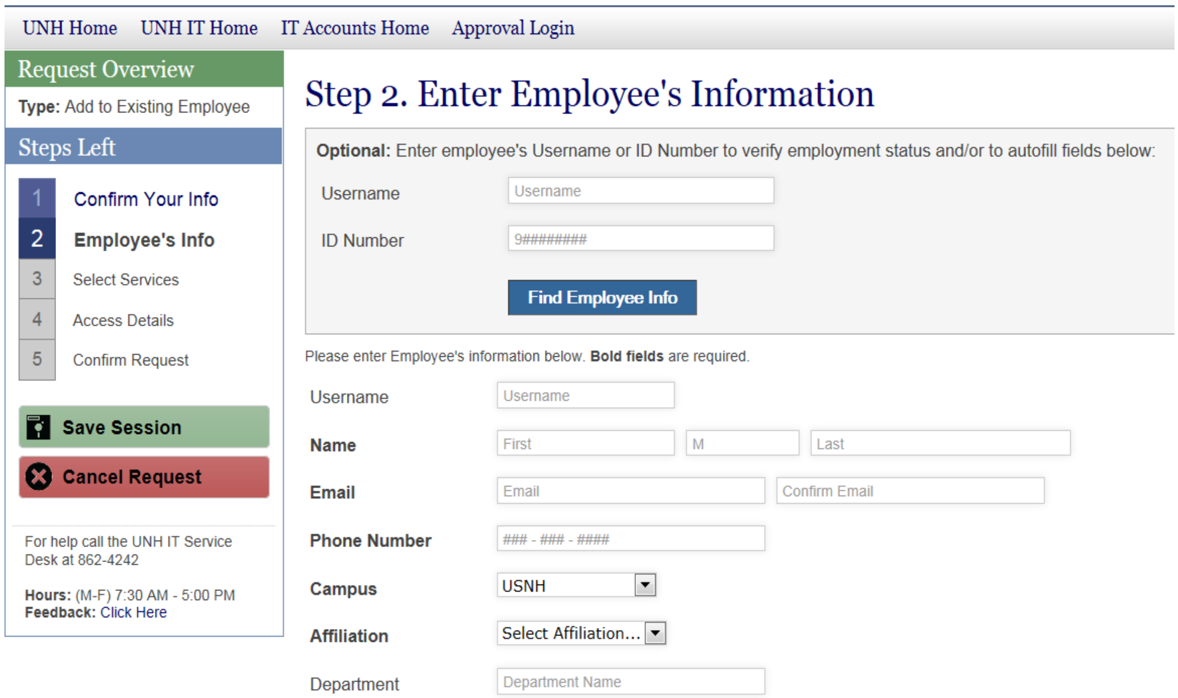
Step 1. Verify Your Information.



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

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.



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

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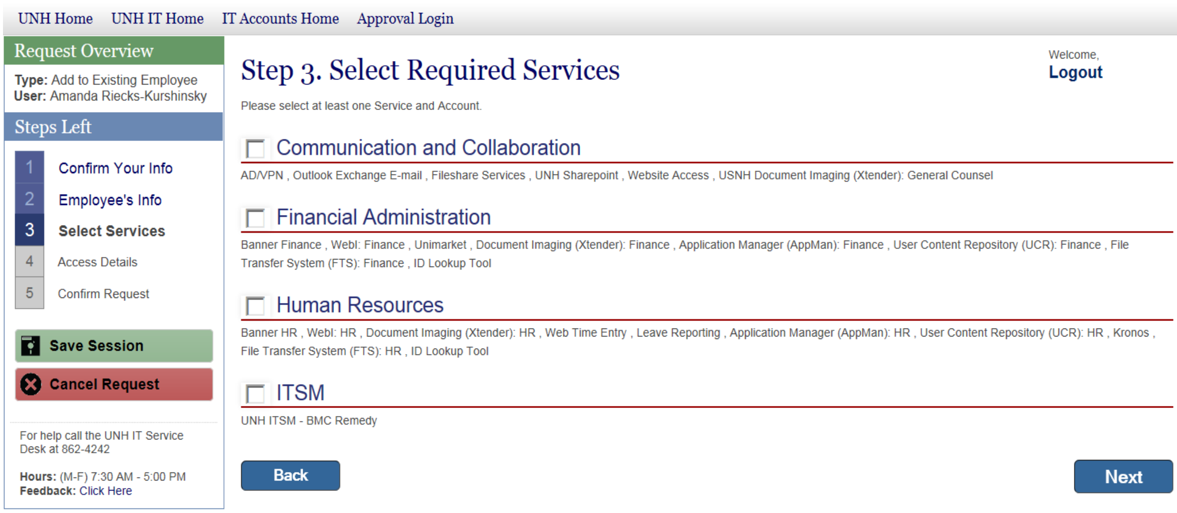
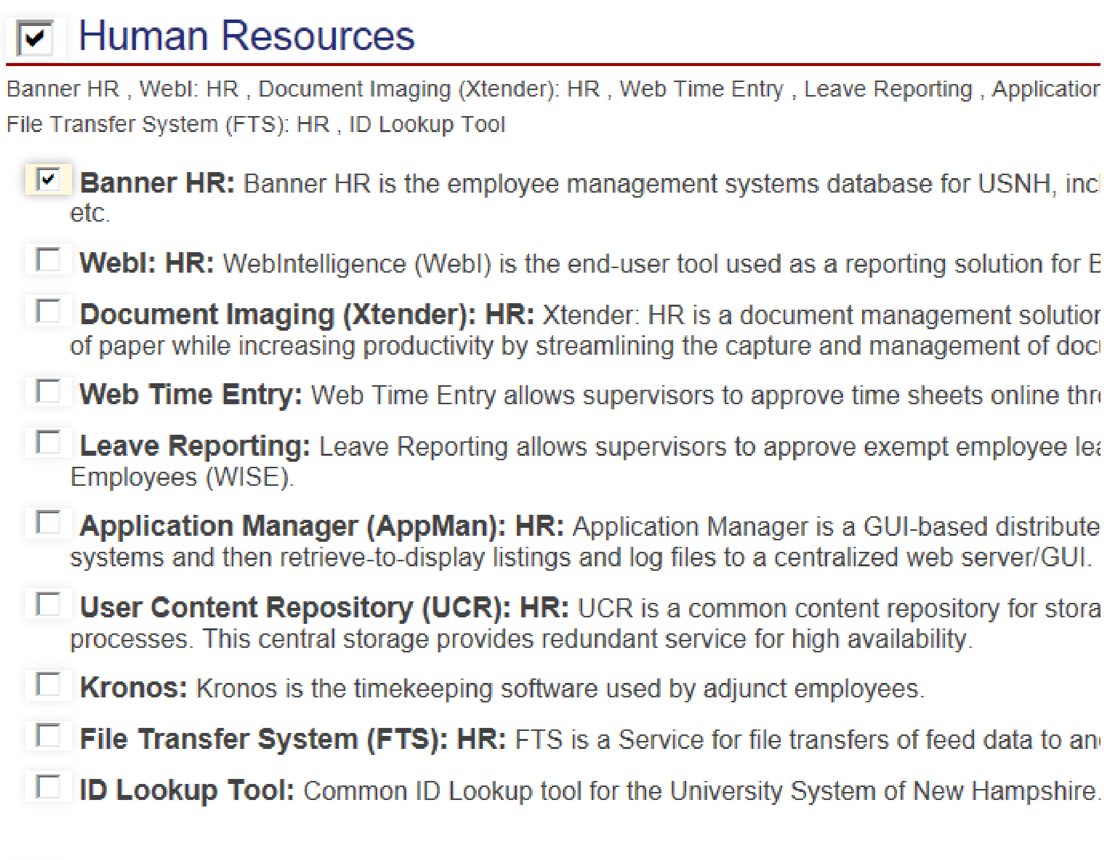




Step 4. Access Details

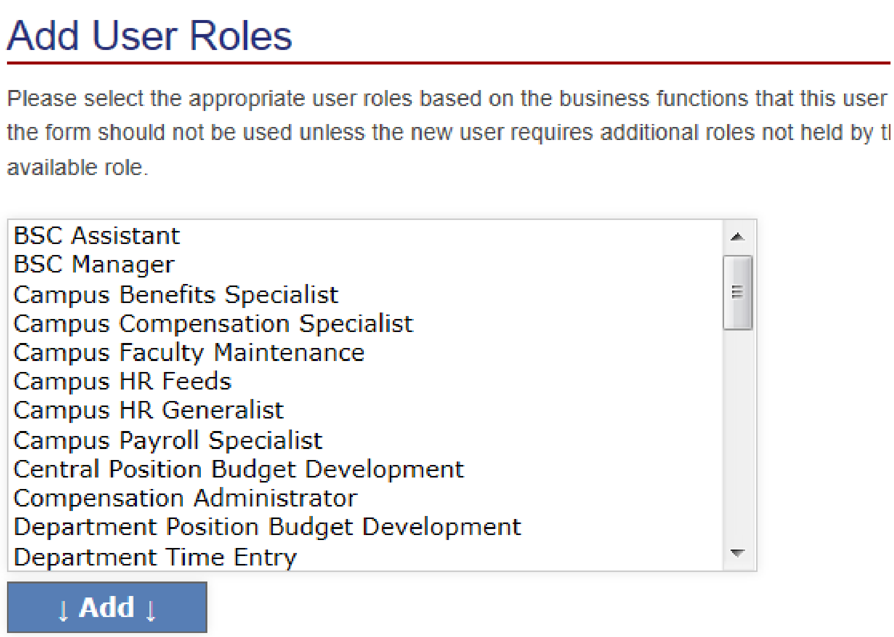
Banner HR screen

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	☐
PHAREDS - Payroll Redistribution	N/A	N/A	☐
Service Desk WISE PIN Reset	N/A	N/A	☐
USNH HRIS	N/A	N/A	☐

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.



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 EPAF 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 Needed? ○ Yes ○ No

Select up to 3

From: To:

From: To:

From: To:

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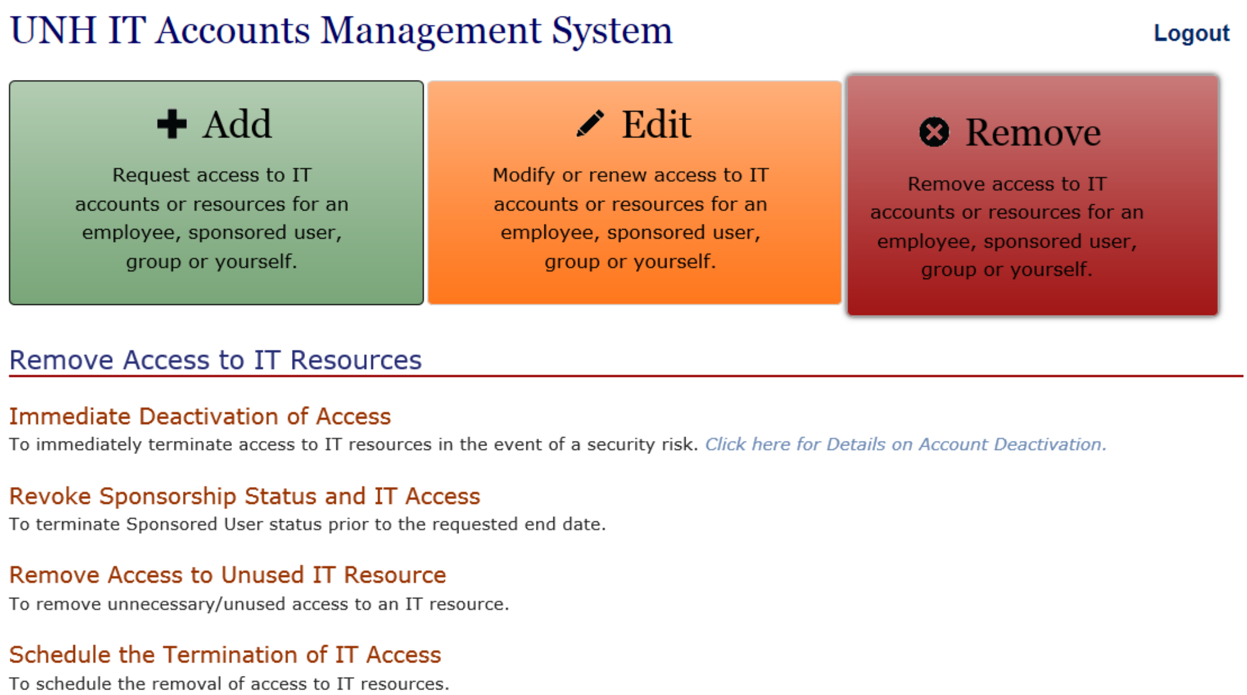
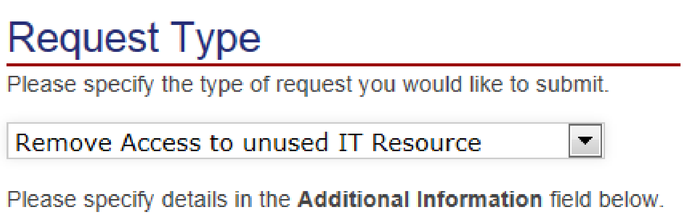
Remove Access

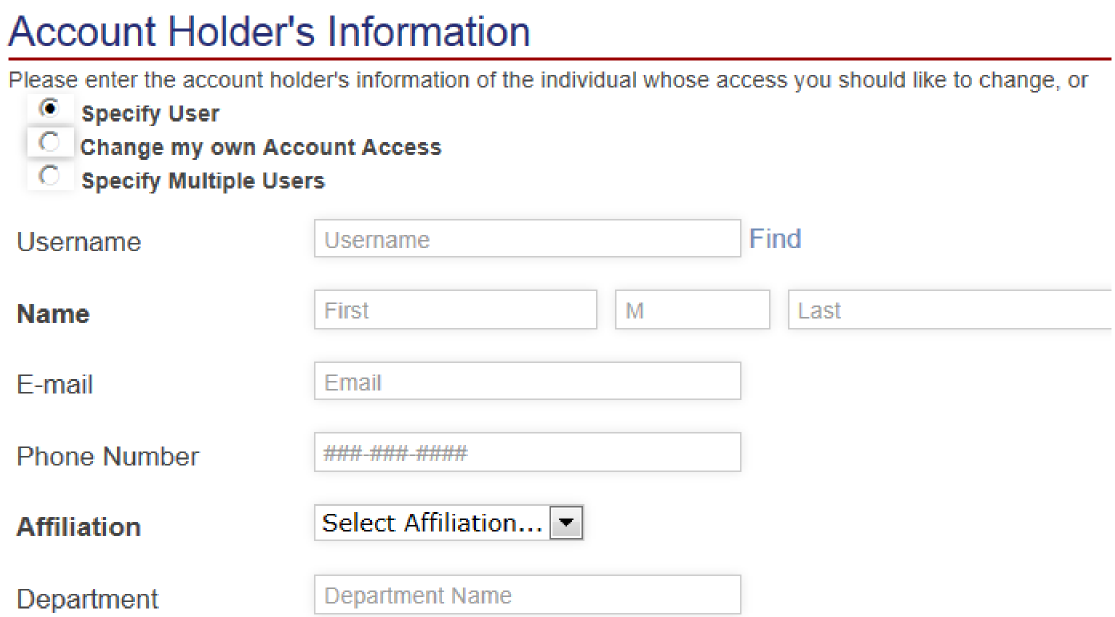
From the UNH IT Accounts Management System home screen click the Remove button on the right.



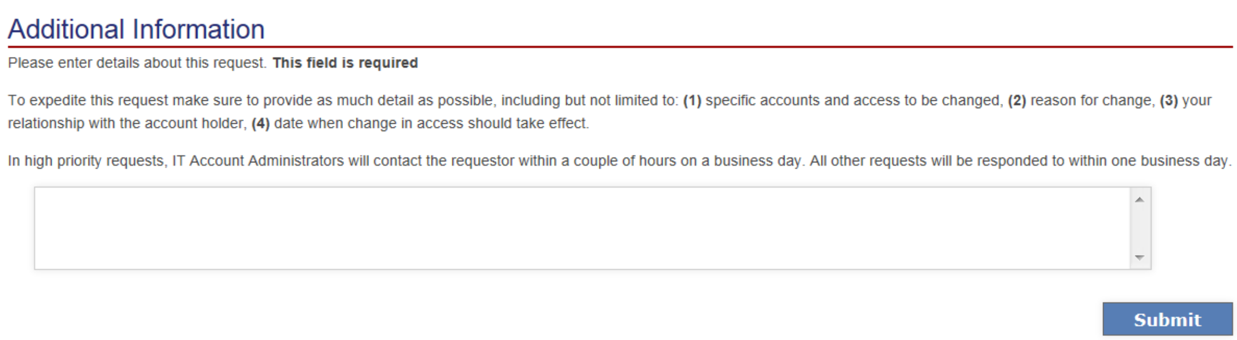
This opens a submenu below with the following options: Immediate Deactivation of Access, Revoke Sponsorship Status and IT Access, Remove Access to Unused IT Resource, and lastly Schedule the Termination of IT Access. These are all similar in terms of procedure and screen flow so let's run through the '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.'



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



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.



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.