

Directions for Employees

Click on the appropriate Banner Access Request Form (Advancement, Finance, Financial Aid, Human Resources or Student) and complete the following line items:

1. Fill out your EIU Username (email prefix – such as jadoe, not jadoe@eiu.edu)
2. Department Name
3. Name
4. Job Title and Phone.
5. Click the button that best describes your employment at EIU:
 - a. Staff, Faculty or Administration
 - b. Adjunct Faculty
 - c. Temporary/Extra Help
 - d. Student Employee
6. Click the button that best describes your needs:
 - a. Create a new account
 - b. Modify account access
 - c. Remove access
7. Describe what duties you will perform when accessing Banner, (i.e. Fiscal Agent, approve invoices create requisitions, purchase supplies, etc.)
8. If you are replacing a former employee, please list their name.
9. Read the last two pages of the Banner Access Request form. Sign that you have read the Statement on the Privacy of Student Records and the Confidentiality Notice. Your immediate supervisor must sign here as well.
10. Supervisor must fill out the 2nd page – **Banner Access For Finance Only** – and provide the fund/org numbers requested as well as check the appropriate boxes to give access for the various Finance functions.
11. Submit both forms for signature by the Dean, Director, Department Chair or other departmental representative.

Directions for Director/Dean/Department Chair or other departmental representative

1. Check line 6 of the first page, access status (new, change or remove access)
2. Check the Banner Access Form For Finance Only for accuracy
3. Sign and date both forms
4. Send the form to Dave Horsman, designee of the Module Custodian

Module Custodian

1. Check what type of access is to be given
2. Assign employee to appropriate security class
3. Sign and date the form
4. Send the form to Cathy Ashmore, Banner Security/ITS to complete the process

Directions for IT Security

1. Create Oracle ID
2. Assign Class(es)
3. Assign GOATPAD Pin and Base class
4. Send user a confidential Memo with Banner/Oracle ID and password
5. Keep original copy for IT records and make a copy for Module Custodian