

## Instructions – Request for Access – BANNER Finance System

1. Check the appropriate box – New Request , Change Request, or Add'l Request
  - a. New request – for users who do not currently have access to Banner Finance
  - b. Change request – for users who have changed departments and/or duties – only the access requested on the form will be given. Other access will be deleted, if applicable.
  - c. Add'l request – for additional access needed. Current access will be kept. NOT to be used for individuals who have changed departments.
2. Fill in the following data in the spaces provided
  - a. Name
  - b. Current user ID
  - c. Title
  - d. Department
  - e. Office Phone Number
  - f. Department Codes – Accounting Services will fill this in if you don't know your department code. You will be granted access to just your department unless your job requires you to view financial data for other departments.
  - g. Date (will fill in automatically when you type in the name field)
3. Fill out Access Requested Section (explained below). If you are requesting access identical to another employee, enter that employee's name and user id after "Banner Finance Access Requested same as". If you fill this in, you can skip the rest of the Banner access section. Accounting Services personnel will check the appropriate boxes.
4. Please review the Non-Banner Access Request area
5. Read "Access Privileges Statement".
6. Sign and date the form.
7. Have the form signed (Approval Signature) by the Department Head or Supervisor.
8. The completed form can be faxed to 487-2119 or sent to Joan Hoffman in Accounting Services.
9. If you have any questions, please contact Joan at 487-2699 or [jhoffman@mtu.edu](mailto:jhoffman@mtu.edu).

## Banner Access Requested Section

Typical finance users check:

- **Inquiry Access to Banner Forms and Discoverer and Oracle Reports.** This provides inquiry access to account balances, purchase requisitions, purchase orders, invoices, inter-account bills, other accounting transactions and a variety of financial reports.

Banner Finance Update:

- **Graduate Tuition Support:** Provides ability to enter graduate tuition support data on form TZAGRSP
- **Fellowship Checks:** Provides ability to enter fellowship data on form FZAFELL
- **Budget:** For users who enter annual general fund budgets into Banner.
- **Inter-account Bills (IB):** For users who enter inter-account bills directly in Banner.

Accounts Receivable:

- **Inquiry Access to Student AR and Oracle Reports** – provides access to student accounts receivable balances through Banner forms and Oracle Reports

Banner Accounts Receivable (AR) Update

- **Student Bills (update)** – provides ability to enter student charges on a restricted basis; restriction codes will be entered by Accounting Services

Public Safety

- **FZIKEYS – Key System Inquiry Form**
- **FZAKEYS – Keys Information Form (by person)**

For questions about these forms, please contact Chris Crouch at 487-2216 or [cacrouch@mtu.edu](mailto:cacrouch@mtu.edu).

## **Non-Banner Access Requested Section**

### **ASPIRE Web Application**

([https://www.banweb.mtu.edu/pls/mtu/GEN\\_BLDGS\\_MAIN\\_MENU.p\\_aspcmenu](https://www.banweb.mtu.edu/pls/mtu/GEN_BLDGS_MAIN_MENU.p_aspcmenu))

- **General Inquiry** – provides access to some system reports in ASPIRE  
Note: Space Coordinators are automatically given similar.
- **ASPIRE Update** – administrative edit access
- **Deans & Chairs** – provides access to reports in the Deans & Chairs dashboard (access automatically given to Deans, Chairs, & Department Coordinators)
- **Research** – provides access to research reports (Deans & Chairs access includes this)
- **Technology Update** – update access for technology available in rooms

For questions about the ASPIRE Web Application, please contact ASPIRE at 487-2814 or [aspire@mtu.edu](mailto:aspire@mtu.edu).

### **Web Forms**

- **Reallocation of Expenditures**
- **Check Request\***

\*The check request form requires that you enter the e-mail of the approving party. That person will be e-mailed a copy of each check request that you submit. Accounting Services will assume that the check request is valid if no action is taken by the approving party to disapprove the request. A signature line will appear on a check request of \$5,000 or more and it must be signed by a department head, chair, dean or director. Please print the form after submitting and then send the signed form to Accounting Services or Sponsored Programs Accounting.