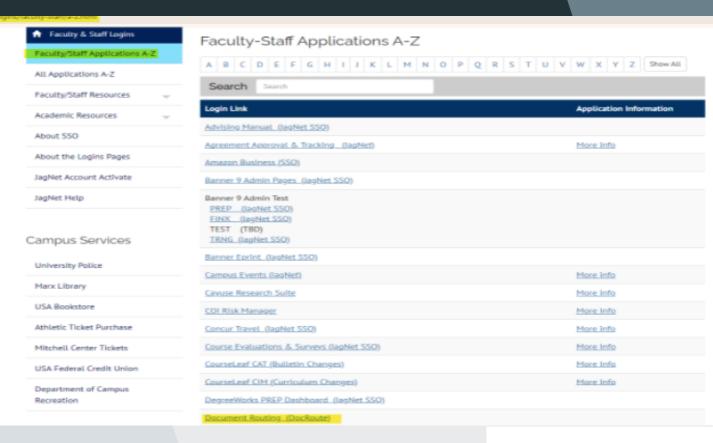# DocRoute

Banner Finance Security Form

Instructions for using
DocRoute Banner Finance Security Form

Navigate to Faculty and Staff Logins page of the USA Website and expand Faculty/Staff Applications A-Z at the left. Click on Document Routing (DocRoute):

At the prompt, enter your Jag Number and SSO password:
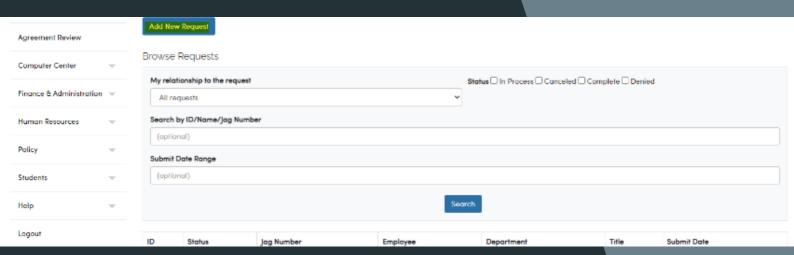
DocRoute

This is the USA Document Routing system. It is used for tracking and approval of many different processes. If you would like to make a new request or review an existing request please login with your JagNet credentials below.

Jag Number
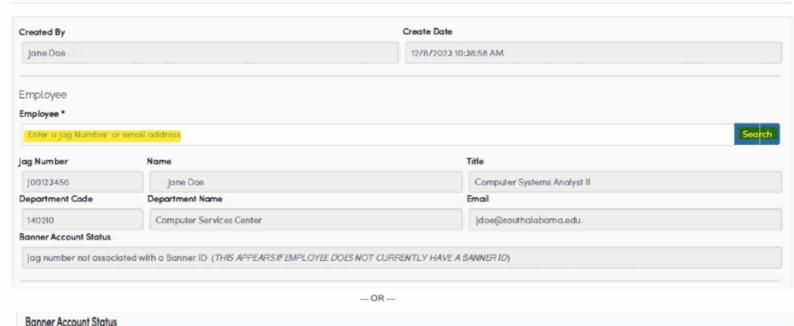
Jag Number is required.

Invalid Jag Number

Password

Password is required.

Login

Expand "Finance & Administration" on the left and choose "Banner Security Form." Click "Add New Request:"

continued

Agreement Review

Computer Center ▼

Finance & Administration ▼

Human Resources ▼

Policy ▼

Students ▼

Help ▼

Logout

Add New Request

Browse Requests

My relationship to the request

All requests ▼

Status ☐ In Process ☐ Canceled ☐ Complete ☐ Denied

Search by ID/Name/Jag Number

(optional)

Submit Date Range

(optional)

Search

ID	Status	Jag Number	Employee	Department	Title	Submit Date

Enter a Jag Number or an email address, then click on Search. This form will allow you to request Banner Security for yourself, or on behalf of another employee. The fields in gray will prefill.

Entry

Created By

Jane Doe

Create Date

12/6/2023 10:38:58 AM

Employee

Employee *

Enter a Jag Number or email address   Search

Jag Number

J00123456

Name

Jane Doe

Title

Computer Systems Analyst II

Department Code

140210

Department Name

Computer Services Center

Email

jdoe@southalabama.edu

Banner Account Status

Jag number not associated with a Banner ID (*THIS APPEARS IF EMPLOYEE DOES NOT CURRENTLY HAVE A BANNER ID*)

--- OR ---

Banner Account Status

Enter the Department Head/Approving Supervisor's Jag Number or email address. The gray areas will prefill.
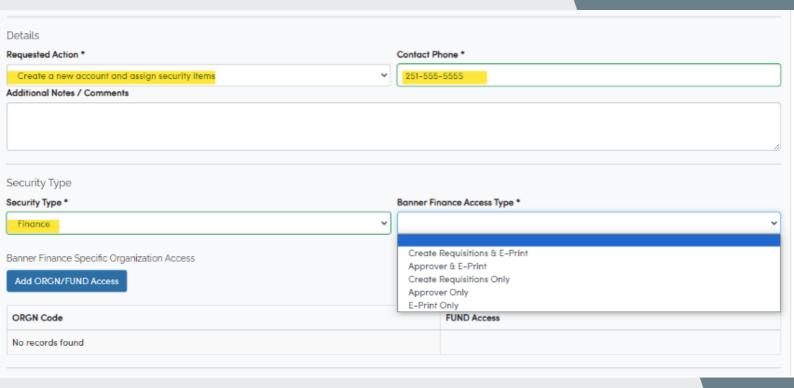
Department Head or Approving Supervisor

Supervisor *

Enter a Jag Number or email address

Jag Number

J00234567

Full Name

Sarah Smith

Email

sarahsmith@southalabama.edu

Requesting
NEW ACCESS

Details

Requested Action *
Create a new account and assign security items

Contact Phone *
251-555-5555

Additional Notes / Comments

Security Type

Security Type *
Finance

Banner Finance Access Type *

Create Requisitions & E-Print
Approver & E-Print
Create Requisitions Only
Approver Only
E-Print Only

Banner Finance Specific Organization Access

Add ORGN/FUND Access

ORGN Code | **FUND Access**
No records found

If the user is requesting new access, the only option available in the "Requested Action" drop-down is "Create a new account and assign security items." Add a phone number where you can be reached in the next field. Choose "Finance" from the drop-down for "Security Type." Choose one of the options in the "Banner Finance Access Type." This field corresponds to section 5 on the previous paper form:

5. Type of Access:
☐ Create Requisitions ☐ Approver (Limit: _____) ☐ E-Print ☐ Budget Query ☐ ID-Search

Next, click on "Add ORGN/FUND Access" button to indicate which Organizations and Funds you need access to:

For each ORGN, you have three options pictured to the right. If you choose "All Grants for PI," please list the PI's name and Jag Number in the "Additional Notes/Comments" field before submitting the form.

Add Finance ORGN/FUND Access

Organization Code *
172100

Access *

All FUNDs for this ORGN
All Grants for P.I.
Individually List FUND codes

Security Type
Finance

Banner Finance Specific Organization Access
Add ORGN/FUND Access

Next, choose the "Security Source." You can either request us to copy from an existing employee or describe what type of access you need in the box provided:

Security Source

Security Source *

| Copied from an existing employee | ✓ |

User to Copy

| Enter a Jag Number or email address | Search |

Jag Number | Name | Title
J0034567B | John Bond | Supervisor

Department Code | Department Name | Email
172100 | Business Office | johnbond@southalabama.edu

----- OR -----

Security Source

Security Source *

| Described below | ✓ |

Describe the Access You Need *

I need general Banner Finance access and also need access to run ZFGR0036 Budget Status Report.

Once you are done, read the attestation at the bottom and click on "Submit." Your request will process through the appropriate approval queues and you will be notified once your Banner Finance access has been set up.

CHANGING YOUR EXISTING BANNER FINANCE ACCESS:
Here is an example of someone who already has Banner Finance access, but has transferred to another department and needs access to different Organizations, Funds and reports. You can also choose the option to copy an existing user's access under "Security Source" (not pictured, see instructions in new Banner users section):

Details

Requested Action *
Change the security items on the account

Contact Phone *
251-555-5555

Additional Notes / Comments
I have transferred to another department and need to change ORGN/Fund access.

Security Type

Security Type *
Finance

Banner Finance Access Type *
Approver & E-Print

Banner Finance Specific Organization Access

Add ORGN/FUND Access

ORGN Code	FUND Access	
420100	All FUNDs for this ORGN	Delete
420300	273385, 273399, 273415	Delete

Security Source

Security Source *
Described below

Describe the Access You Need *

Managers can also use this form to request Banner access to be removed for terminated employees:

Details

Requested Action *
Remove all security items and lock the account

Contact Phone *
251-555-5555

Additional Notes / Comments
Jane Doe's last day was 12/7/23. Please remove Banner Access.

By submitting or approving this request I understand that, I may be given access to one or more administrative computer systems. The information contained in the private and confidential nature and I acknowledge it is my responsibility to maintain the privacy of these records.

I have read the University's Information Systems Security Policy and understand all the requirements and guidelines stated therein. I understand that I am respon passwords which I have been given and that I will be held accountable for any invalid use of my user identification. I further acknowledge that my failure to follow will subject me to disciplinary action up to and including dismissal and possible legal action.

Submit

If you have any questions or need assistance completing the form, please call the Business Office at 251-460-6241 and we will be glad to help.