logo **Request for ELECTRONIC Finance/PAYROLL Access**

Employee Information:

**Employee’s Email ID (4 or 6 characters)**

Employee Name Campus Phone #

Job Title  Department

Department Address

**Employee’s Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Type of Access needed:

Banner Forms Viewing  Data Collect (JV-Data entry)  Desktop Finance/Argos Dashboard Viewing

**Please list the index numbers for which Banner access is necessary:**

**Index # (Account #) Check box**  **Financial Manager Authorization** **Index # (Account #) Check box** **Financial Manager Authorization**

**for Payroll for Payroll**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| 1 |  |  | 16 |  |  |
| 2 |  |  | 17 |  |  |
| 3 |  |  | 18 |  |  |
| 4 |  |  | 19 |  |  |
| 5 |  |  | 20 |  |  |
| 6 |  |  | 21 |  |  |
| 7 |  |  | 22 |  |  |
| 8 |  |  | 23 |  |  |
| 9 |  |  | 24 |  |  |
| 10 |  |  | 25 |  |  |
| 11 |  |  | 26 |  |  |
| 12 |  |  | 27 |  |  |
| 13 |  |  | 28 |  |  |
| 14 |  |  | 29 |  |  |
| 15 |  |  | 30 |  |  |

**Financial Manager (account executive) approval is required for each index number. One signature can be written on the diagonal line for each column, or on the line below, if the same person is the Financial Manager on all index numbers listed.**

**Financial Manager’s Signature \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**The section below is FOR CONTROLLER’S OFFICE USE ONLY:**

**Banner Finance User Class / Reporting Role Security**

**Requested Access Date Approved Database(s)**

|  |  |  |  |
| --- | --- | --- | --- |
| |  | | --- | | USR\_Q\_FBUDGETQUERY\_C  USR\_Q\_FGENLED\_C | |  | **ECPROD** |
| USR\_Q\_FADMINUSER\_C |  | **ECPROD** |
| USR\_ \_F \_C |  | **ECPROD** |
| USR\_ \_F \_C |  | **ECPROD** |
| USR\_DEFAULT\_FIN\_ |  | **ECPROD** |
| USR\_DEFAULT\_FIN\_LU\_TBLES\_R (for Desktop Finance Viewing) |  | **ECRPTP** |
| Entered by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Approved by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Signature Date Signature Date | | |

Banner Finance Access REQUEST Instructions

1. Fill out the Employee Information, the Type of Access needed, and the Index sections. (If there are more than 30 numbers, please attach a list of the Index numbers.)
2. If detailed viewing access is needed for Payroll charges within any of the Index numbers listed, please check the box next to the index number(s).
3. Obtain the Financial Manager’s signature approval for each Index number listed. If the same person is Financial Manager for all indexes listed, they can sign on the Financial Manager’s Signature line below the Index boxes. If there are multiple Financial Managers, they must sign in the box next to the index #.
4. Send the completed request form to: **Controller’s Office, 306 S. New Street, Suite 451 – or email to inctr@lehigh.edu.**
5. To schedule Banner Finance and FERPA training, follow these steps :
   1. Go to the website [Library and Technology Services Help](https://jira.cc.lehigh.edu/servicedesk/customer/portal/1)
   2. Select “Enterprise software help” (it may ask for your Lehigh credentials)
   3. Fill in your employee information
   4. Select “Banner Access/Training”
   5. Select “Myself or someone else” in Request Impact
   6. Fill in the summary line with “Banner Finance Training needed”
   7. In the larger description box, list the type of training you will need – Banner Finance Forms, Data Collect and/or Desktop Finance/Argos Dashboard Viewing.
6. You will receive your Banner Production password at your training session.
7. If you have any questions, please contact Cindy Hickman, Assistant Director, Financial Systems (cmh3 or extension 83204).