

SUBJECT: CREATING, MODIFYING AND DELETING BANNER ACCOUNTS FOR ACCESS TO PRODUCTION

DATE: Sept. 15, 2006

STANDARD: Ensure that access to the Banner ERP system is controlled and users are allowed access to only that information which is required for them to perform their job functions

PROCEDURES:

1. To create access to Banner for a new user, a Supervisor must first determine to which Banner Class(es) the user needs access in order to perform their job, and whether in Query only mode or Modify mode. A Banner Class is a group of Objects or Forms that allows a user to perform certain functions, e.g. payroll clerk, budget manager. Supervisors should confer with Computer Services personnel to determine the objects in each Class and which Class supports a job function. Only access to Classes will be authorized, NOT access to individual or additional Banner objects or forms.
2. The user must read the NSCC Acceptable Use Policy found at <http://www.nsc.edu/general/use.html>.
3. The Supervisor must fill out a Screen Security Access Form for the new user. User name, department and position title are required. All Banner Classes for which access is being requested must also be listed. The supervisor should place a check beside the names that are required to sign the form, authorizing access to certain Banner systems. The supervisor should confer with Computer Services if necessary in order to determine the signatures required for the Classes listed on the form.
4. The user must sign and date the form, agreeing to abide by the NSCC Acceptable Use Policy.
5. The user's supervisor will review the Screen Security Access Form and sign it as approved
6. Signatures must be obtained from those individuals who have a check beside their title.
7. Upon receipt of the form, the Director of Computer Services will review the request and sign the form if approved. The Director will return the unsigned form to the requestor's supervisor should corrections or additional information be required.
8. The Director of Computer Services will forward the form to the CSD Secretary, who will enter a Help Desk ticket and will forward the form to Computer Services Administrative Information Services. A Programmer or Analyst will activate an

account and assign the appropriate Banner Classes. The account name will be in the form of: [lastname_firstinitial](#). In the event that an account already exists for another user having the same last name and first initial, the new account will be created as [lastname_firstname](#). The initial password will be the user's date of birth in the format mmddyyyy, but the user will be required to change it at first login. When the account is set up, the Analyst will sign as the Security Operator and date the form.

9. The form will go to the Manager of Administrative Information Services or his designee. He will check to ensure that the Classes authorized and the Classes assigned are the same. If so, he will sign the form to give final approval.
10. The form will go to the CSD Secretary who will file the form and notify the Help Desk. The Help Desk technician will contact the user, informing them that their account is set-up and they must change their password the first time they log-in.
11. Steps 7-10 should be accomplished within 24 hours.
12. Once a year, the CSD Secretary and the Manager of Administrative Information Services will compare the active forms with a list of active Banner accounts to determine any discrepancies. These will be addressed immediately. The list of active Banner accounts will next be sent to department heads to ensure that those having access continue to require it for their job function and that they continue to be employed at NSCC.
13. In order to change the access privileges for a Banner account, the following procedures should be followed
 - a. When a user needs access to additional Banner functions, he / she should confer with his / her supervisor and determine which additional Classes are required.
 - b. The same procedure outlined in 1-11 above should be followed.
 - c. The CSD Secretary will mark the Screen Security Access Form that the new form is replacing as **VOID** and attach the most recent and accurate form to the older form. The Revision number will also be on the top form. These should be filed in the active account file.
14. Upon being notified by the Office of Human Resources of an employee separation or Banner privileges being taken away, the CSD Help Desk will create a task for Administrative Application Services to terminate the Banner account
 - a. An Analyst accepts the task, logs into Banner as a security administrator, locks the account, expires the password, removes the account's association with form security classes, and marks the task completed. The programmer or analyst should lock the account this within one hour of

receiving this notice.

- b. The notice will next be sent to the CSD Secretary, who will mark the user's Screen Security Access Form as **deactivated**. The secretary will send the form to the Manager of Administrative Information Services who will confirm that the account is deactivated and provide a written and signed confirmation on the form.
 - c. The CSD Secretary will file the form in the deactivated file.
15. To create Banner Classes for new job titles or in cases where the scope of responsibility of a job title has change, functional department managers will determine the assignment of query and maintenance access to Banner forms and processes for job titles within their respective department and forward their choices to Administrative Application Services
- a. Functional department managers will designate specific employees to be associated with job titles and forward this information to Administrative Application Services
 - b. Administrative Application Services will create Banner security classes to reflect the grouping of forms and processes with job titles at the requested level of access. The security classes will have names in the form "NSCC_XX_TITLE_C" where XX is the Banner module (i.e. – ST = Student, FA = Financial Aid), TITLE is an abbreviated form of the functional job title and C denotes a Banner security class
 - c. Administrative Application Services will create a printed list of forms in each new class with a signature sheet for approvals
 - d. The Director of the Computer Services Division will circulate the class listing and signature sheet for the approval of department heads whose forms are included in the class