

The College of Charleston takes the security of its financial and human resources data and systems seriously. This form is an important and necessary step in the process of establishing users of the Banner Finance Self-Service System (SSB), the Cognos reporting tool, ePrint reports, and other financial data sources. Your attention to proper completion of this request form is appreciated.

NOTE: This form is data-enterable. Please do not leave blanks. **INCOMPLETE OR ILLEGIBLE FORMS WILL BE RETURNED TO THE REQUESTOR.**

PROCESS FOR COMPLETING THIS FORM:

Employee:

1. The requesting employee completes all information on pages 1 and 2.
2. The User Name and CWID (**NOT** your social security number) should be entered on page 1.
3. The employee must read the non-disclosure agreement on page 1 and sign and date at the bottom of the page.
4. An employee cannot approve their own finance access, their Supervisor must approve access.

Department Head (DH) or Department Heads Supervisor (if DH is requesting access):

1. Initial next to the types of access requested on page 2;
2. Initial next to the indexes to which access should be granted on page 2; and
3. Print name and title, and Sign and date this request form on page 2.

NOTE: Department Heads or the Department Heads Supervisor (if DH is requesting access) should ensure that approval to see Human Resources information is only granted when intended. Human Resources information includes payroll information. Whoever has this finance security role will have viewing rights to payroll information for all people within the index(es) in which the employee will have access.

The approved request is then forwarded to the Deputy Controller, Compliance & Information Services in the Controller's Office.

Deputy Controller, Compliance & Information Services:

The Deputy Controller will identify, and approve the finance security role(s) required in support of the employee's job duties. The Deputy Controller, Controller, Director of Budgeting & Payroll services, and the Chief Procurement Officer, or their respective designee, must each approve the finance security roles before the form is sent to the IT Banner Security Administrator for processing. Once the IT Banner Security Administrator effects the requested roles/changes, the IT Banner Security Administrator will notify the Deputy Controller, who will then establish access, and notify, the requesting employee, and their supervisor, that access has been established.

NOTE: If anyone has any questions regarding this form, or process, contact the Deputy Controller before submitting the form to the Controller's Office.

In order to finalize finance security setup, a completed **Index/FOP Access Form** is the required next step. An Index/FOP Access Form is a record of all persons, who will need access to, or be approvers for, each index. This form is used by the Controller and Procurement Offices, as proof of which persons may:

- view financial data (SSB/Cognos access);
- approve Expense Authorization's (EA), IDT's, Journal Entries,
- approve Budget transfers,
- approve eProcure carts, or
- the form also designates the approval limits for each person.

NOTE: An **Index/FOP Access Form** is **required**, as the final step, in order for access to be granted. Without an updated **Index/FOP Access Form**, the process will be incomplete, and access will not be granted.

NOTE: Each Index/FOP Access Form supersedes all previous forms. Please ensure that all who will need access to, or be approvers for, each index are listed.

NOTE: The **Index/FOP Access Form** and instructions are available on the Controller's Office website at: <http://controller.cofc.edu/banner-system-access-forms/index.php>

Employee's name:

Employee's CofC ID number (CWID):

APPROVALS

SSB FINANCE ROLES (to be completed by the Finance Security Coordinator)

Deputy Controller initials:

- _____ Banner SSB Finance (BAN_COFC_F_GENERAL_REPORTS) AND Cognos Finance Consumer AND eProcure.
_____ Human Resources reports (BAN_COFC_F_HR_REPORTS).
_____ Budget Transfer (BAN_COFC_F_REQUIRED_BUDGET_ADJ).
_____ eProcure ONLY access.

Deputy Controller, Compliance & Information Services (Finance Security Coordinator):

_____, Date: _____, or designee

Controller (Finance Data Steward):

_____, Date: _____, or designee

Director of Budgeting & Payroll Services:

_____, Date: _____ Everett McInnis, or designee

Chief Procurement Officer:

_____, Date: _____ Wendy E. Williams, or designee

FOR IT USE ONLY

Date received by IT Banner Security _____

Administrator: Date request completed: _____

IT Banner Security Administrator name: _____

IT Banner Security Administrator signature: _____