

This form is used to grant access to Banner Finance, COGNOS Reporting, and TUmktplace

Controller's Office

SECTION A | Employee Information Extension: ____ (____ ____ ____)

Name:	
Title:	
Dept:	

TU ID:	
AccessNet ID:	
E-mail Address:	

SECTION B | Request Type

SECTION C | Authorities

Put an X next to the appropriate request type

Put an X next to each authority requested

B1: New:	<input type="checkbox"/>
B2: Replace / Update:	<input type="checkbox"/>
B3: Terminate:	<input type="checkbox"/>

C1: TUmktplace Only:	<input type="checkbox"/>
C2: Budget Transfer Rights:	<input type="checkbox"/>
C3: Access to Compensation Detail:	<input type="checkbox"/>

SECTION D1: *Fill in Org Hierarchy Role-ups* **OR** **SECTION D2:** *Fill in specific organizations*

SEE TUportal: The Financial Organizational Hierarchy provides role-up levels that give access to all organizations under that hierarchy

SECTION E | Fund Access

SECTION E1 | Access to All Funds

SECTION E2: *Fill in certain fund-types* **OR** **SECTION E2:** *Fill in individual, specific funds*

SEE E2 instructions for selecting certain fund-types.

Comments:

SECTION F | Approvals

Business Unit Authorization	Date
Unit Head	

Controller's Office Authorization	Date
Controller's Office	

Completed forms should be submitted to the Controller's Office.

Questions: Please Contact: 1 (7663)

FOR INTERNAL FINANCE USE ONLY

Security Set-up	
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FINANCE SECTION ONLY

Instructions

SECTION A: Information	Complete required employee information	
SECTION B: Request Type	Check next to the applicable request-type; new, replace / update, termination.	
SECTION C: Authorities	Check next to applicable authorities: C1: TUmktplace: authority to requisition only. No authority to authorize a transaction. C2: Budget transfers: authority to submit budget adjustments through Self-service Banner. C3: Compensation Detail: ability to view compensation detail through COGNOS Reporting.	
SECTION D: Org-Access	List the organizations that need to be accessed. (SEE Crosswalk and Financial Organizational Hierarchy Chart on the TUportal) D1: Org. Hierarchy: Referring to the Finance Organizational Hierarchy, a higher-level roll-up may be selected to capture several organizations. D2: Single Org: List each Org individually.	
SECTION E: Fund Access	Access can be granted at several levels: from All-funds (E1) used with an org, to certain fund-types i.e., ALL GRANTS (E2) to only specific funds (E3).	
SECTION E1	Full Access	- Access to all funds with the orgs requested.
SECTION E2	Certain Fund-types	- Access to only certain fund-types with the orgs requested.
	Operating Funds (100)	Designated Funds (14-17)
	Workshops and Seminars. (101)	Patient Care Funds (18)
	Carry-over Funds (103)	Gifts Funds (21-23, 51-53)
	Academic Support (104)	Grant Funds (24-49, 55)
	Academic Auxiliary (105)	Endowment Funds (71-76)
	Tech Fees (106)	Plant Funds (80-83)
	Service Centers (109)	Agency Funds (90)
SECTION E3	Individual Funds	- Access to individual funds with the orgs requested.
SECTION F: Approvals	All Finance Access Request Forms must be approved by the appropriate Budget Unit Head before being sent to the Controller's Office. Finance will provide final review and approval before forwarding to Security for set-up.	