

General Authorization Access Roles for Finance and Student Modules *(rev. 12/06/06)*

What training do you need? Don't know? The chart below is a decision tree addressing access roles and job duties with regard to both Finance and Student modules of Banner. Use the chart and work with your supervisor to determine what best fits your department needs. ***Required Training is listed first, in bold, italicized print;*** *Optional Training is listed last and marked with asterisks.

Please print this page as a reference tool as you register for training or request Banner access.

Finance Module

Important Note: Most of the optional Finance Training will become required beginning January 1, 2007

Role Title	Role Description	Training
Department Approval Queue Setup Query	Ability to query approval queue setup and approving users through the Banner Authorization Administration (BAA) Web application.	<ol style="list-style-type: none"> 1. <i>General Finance Web Overview (1hr)</i> 2. <i>Securing Private Data Exam (30min)</i> 3. <i>Banner Fundamentals & Navigation Competency Exam(30min)</i> 4. *Optional: Banner Fundamentals and Navigation(30min) 5. *Optional: Securing Private Data Web Overview (30min)
Department Direct Pay Processor	Ability to process payments other than purchase requisitions. For example: Direct Pay EZ Requests (Travel Vouchers and Honoraria)	<ol style="list-style-type: none"> 1. <i>General Finance Web Overview (1hr)</i> 2. <i>Securing Private Data Exam (30min)</i> 3. <i>Banner Fundamentals & Navigation Competency Exam(30min)</i> 4. *Optional: Banner Fundamentals and Navigation(30min) 5. *Optional: Securing Private Data Web Overview(30min) 6. *Optional: Encumbrance Processing Web Course (25min)
Department General Inquiry	Basic security role given to all departmental users who require access to the Internet Native Banner System - includes general inquiry to various Banner Finance Forms and access to approval forms. (Note: User must be in an approval queue for approvals to be turned on) Also includes general query access to ePrint application and Brio/ODS(Operational Data Store)Application.	<ol style="list-style-type: none"> 1. <i>General Finance Web Overview (1hr)</i> 2. <i>Securing Private Data Exam (30min)</i> 3. <i>Banner Fundamentals & Navigation Competency Exam(30min)</i> 4. *Optional: Banner Fundamentals and Navigation(30min) 5. *Optional: Securing Private Data Web Overview(30min)
Department Grant Administrator	Ability to query forms in the Research Accounting module. For Department Grant Administrators, Accountants, and Principal Investigators	<ol style="list-style-type: none"> 1. <i>General Finance Web Overview (1hr)</i> 2. <i>Securing Private Data Exam (30min)</i> 3. <i>Banner Fundamentals & Navigation Competency Exam(30min)</i>

Department Grant Administrator (continued)		<ol style="list-style-type: none"> 4. *Optional: Banner Fundamentals and Navigation(30min) 5. *Optional: Securing Private Data Web Overview(30min) 6. *Contract & Grants Fundamentals Web Course (20min) 7. *Optional: Primary E-Print Monthly Report Web Course(20min) 8. *Optional: Finance Standard Reporting Overview Web Course(10min)
Department Inquiry	Query only access to general student accounts receivable information. Includes access to student general reports in Hyperion.	<ol style="list-style-type: none"> 1. General Finance Web Overview(1hr) 2. Securing Private Data Exam (30min) 3. Banner Fundamentals & Navigation Competency Exam(30min) 4. *Optional: Banner Fundamentals and Navigation(30min) 5. *Optional: Securing Private Data Web Overview(30min)
Department Journaler	Ability to input Journal Entries, General Encumbrance Entries, and Temporary Budget Entries for Department FOAPAL string	<ol style="list-style-type: none"> 1. General Finance Web Overview (1hr) 2. Securing Private Data Exam (30min) 3. Banner Fundamentals & Navigation Competency Exam(30min) 4. *Optional: Banner Fundamentals and Navigation(30min) 5. *Optional: Securing Private Data Web Overview(30min) 6. *Optional: Journal Voucher Processing Web Course (45min) 7. *Optional: Journal Voucher Processing Exam (10min) 8. *Optional: Encumbrance Processing Web Course (25min) 9. *Optional: Primary E-Print Monthly Report Web Course(20min) 10. *Optional: Finance Standard Reporting Overview Web Course(10min)
Department Override Designee	Restricted: Must be selected by your Department Chair to perform registration overrides through Internet Native Banner (INB). Includes inquiry access to student information and Student General Reports Viewer	<ol style="list-style-type: none"> 1. General Finance Web Overview (1hr) 2. Securing Private Data Exam (30min) 3. Banner Fundamentals & Navigation Competency Exam(30min) 4. *Optional: Banner Fundamentals and Navigation(30min) 5. *Optional: Securing Private Data Web Overview(30min)
Department Pcard Reallocator	Ability to query and reallocate pcard transactions within Internet Native Banner.	<ol style="list-style-type: none"> 1. General Finance Web Overview (1hr) 2. Securing Private Data Exam (30min)

Department Pcard Reallocator (continued)		<ol style="list-style-type: none"> 3. Banner Fundamentals & Navigation Competency Exam (30min) 4. *Optional: Banner Fundamentals and Navigation(30min) 5. *Optional: Securing Private Data Web Overview(30min)
Department Pcard Reviewer	Ability to query pcard transactions and reallocations within Internet Native Banner	<ol style="list-style-type: none"> 1. General Finance Web Overview (1hr) 2. Securing Private Data Exam (30min) 3. Banner Fundamentals & Navigation Competency Exam(30min) 4. *Optional: Banner Fundamentals and Navigation(30min) 5. *Optional: Securing Private Data Web Overview(30min)
Department Purchase Requisitioner	Ability to create purchase requisitions and make pcard transactions in LoboMart/SciQuest. Note: Must be a pcard holder to make pcard transactions in LoboMart/SciQuest.	<ol style="list-style-type: none"> 1. General Finance Web Overview (1hr) 2. Securing Private Data Exam (30min) 3. Banner Fundamentals & Navigation Competency Exam(30min) 4. *Optional: Banner Fundamentals and Navigation(30min) 5. *Optional: Securing Private Data Web Overview(30min) 6. *Optional: Purchasing Process for Department Labs (4hours)
Department Receiver	Ability to create Banner Receiving documents for goods and Xtender receiving annotation for services	<ol style="list-style-type: none"> 1. General Finance Web Overview (1hr) 2. Securing Private Data Exam (30min) 3. Banner Fundamentals & Navigation Competency Exam(30min) 4. *Optional: Banner Fundamentals and Navigation(30min) 5. *Optional: Securing Private Data Web Overview(30min) 6. *Optional: Purchasing Process for Department Labs (4 hours)
Department Chart of Account Requester	RESTRICTED: Role must be approved by Fiscal Agent: additional approving time is required. Users will be required to be familiar with UNM Policies and Procedures, have a working knowledge of Banner Chart of Accounts and be responsible for the reporting in their department.	<ol style="list-style-type: none"> 1. General Finance Web Overview (1hr) 2. Securing Private Data Exam (30min) 3. Banner Fundamentals & Navigation Competency Exam(30min) 4. *Optional: Banner Fundamentals and Navigation(30min) 5. *Optional: Securing Private Data Web Overview (30min) 6. *Optional: Chart Of Accounts (COA) Maintenance Application Web Course (25min) 7. *Chart of Accounts Maintenance Exam(20min)

Student Module

Important Note: Please be advised that there may be core office training required as well.

Role Title	Role Description	Training
Supervisor Approvals	Supervisors who ONLY review Banner Authorization Requests (BARs) and will NOT be requesting any other Security Roles.	<ol style="list-style-type: none"> 1. Securing Private Data Exam (30min) 2. *Optional: Securing Private Data Web Overview(30min)
Student General Reports Viewer (Included in all roles below)	ONLY for individuals who will not be selecting any other student access. Grants access to general student reports. No sensitive data.	<ol style="list-style-type: none"> 1. Securing Private Data Exam (30min) 2. Banner Fundamentals & Navigation Competency Exam (30min) 3. *Optional: Securing Private Data Web Overview(30min) 4. *Optional: Student and Academic Report Access Web Course(10min) or Continuing Ed. Course – Hyperion Student & Academic Report Access for UNM Employees
LoboWeb Inquiry	Inquiry access to student data via LoboWeb. Includes Student General Reports Viewer.	<ol style="list-style-type: none"> 1. Securing Private Data Exam (30min) 2. *Optional: Securing Private Data Web Overview (30min) 3. *Optional: Student and Academic Report Access Web Course(10min) or Continuing Ed. Course – Hyperion Student & Academic Report Access for UNM Employees
Student Advisor 1 (Includes LoboWeb Inquiry)	Update student Program, Minor, Major, Concentrations, Comments & Load Limits. Set and release Holds. DO NOT need access to degree audit functionality. Includes LoboWeb Inquiry & Student General Reports Viewer.	<ol style="list-style-type: none"> 1. Securing Private Data Exam (30min) 2. Banner Fundamentals & Navigation Competency Exam (30min) 3. Banner Workshop for Advisors (LC) 4. *Optional: Securing Private Data Web Overview(30min) 5. *Optional: Viewing Student Data Training 6. *Optional: Student & Academic Report Access Web Course(10min) or Continuing Ed. Course – Hyperion Student & Academic Report Access for UNM Employees
Student Advisor 2 (Includes Advisor 1 and LoboWeb Inquiry)	Advisor 1 plus review and generate PROGRESS degree audits. Includes Student General Reports Viewer.	<ol style="list-style-type: none"> 1. Securing Private Data Exam (30min) 2. Banner Fundamentals & Navigation Competency Exam(30min) 3. PROGRESS Training (Registrar's Office) 4. Banner Workshop for Advisors (LC) 5. *Optional: Securing Private Data Web Overview(30min) 6. *Optional: Viewing Student Data Training 7. *Optional: Student & Academic Report Access Web Course(10min) or Continuing Ed. Course –

Student Advisor 2 (continued)		Hyperion Student & Academic Report Access for UNM Employees
Student Advisor 3 (Includes Advisor 2 and LoboWeb Inquiry)	Branch Campus Advisement Center Supervisors: Advisor 2 plus authority to assign students to advisors. Review and generate degree audits through PROGRESS. Includes Student General Reports Viewer.	<ol style="list-style-type: none"> 1. Securing Private Data Exam (30min) 2. Banner Fundamentals & Navigation Competency Exam (30min) 3. PROGRESS Training (Registrar's Office) 4. Banner Workshop for Advisors (LC) 5. *Optional: Securing Private Data Web Overview(30min) 6. *Optional: Viewing Student Data Training 7. *Optional: Student & Academic Report Access Web Course(10min) or Continuing Ed. Course – Hyperion Student & Academic Report Access for UNM Employees
Student Inquiry	Inquiry access to student data via Internet Native Banner (INB) and LoboWeb. Review and generate degree audits using Progress. Update access to student comments. Includes Student General Reports Viewer	<ol style="list-style-type: none"> 1. Securing Private Data Exam (30min) 2. Banner Fundamentals & Navigation Competency Exam (30min) 3. PROGRESS Training (Registrar's Office) 4. Banner Workshop for Advisors (LC) 5. *Optional: Securing Private Data Web Overview(30min) 6. *Optional: Viewing Student Data Training 7. *Optional: Student & Academic Report Access Web Course(10min) or Continuing Ed. Course – Hyperion Student & Academic Report Access for UNM Employees
No Banner Authorization request is required for 'Faculty of Record' LoboWeb access		<ol style="list-style-type: none"> 1. Securing Private Data Exam (30min) 2. *Optional: Securing Private Data Web Overview(30min) 3. *Faculty LoboWeb
Attribute Updater	Allows update of student attributes without granting access to full general student update. Includes Student General Reports Viewer	<ol style="list-style-type: none"> 1. Securing Private Data Exam (30min) 2. Banner Fundamentals & Navigation Competency Exam (30min) 3. Viewing Student Data Training OR 4. Banner Workshop for Advisors (LC) 5. Attribute Updater Training (Registrar's Office) 6. *Optional: Securing Private Data Web Overview(30min) 7. *Optional: Student & Academic Report Access Web Course(10min) -OR Continuing Ed. Course – Hyperion Student & Academic Report
Department Override Designee	Restricted: Must be selected by your Department Chair to perform registration overrides through Internet Native Banner (INB). Includes inquiry access to student information and Student	<ol style="list-style-type: none"> 1. Securing Private Data Exam (30min) 2. Banner Fundamentals & Navigation Competency Exam (30min)

	<p>General Reports Viewer</p>	<p>3. Banner Workshop for Advisors (LC) 4. Prior Approval form College Dean or Branch D Director 5. *Optional: Viewing Student Data Training OR *Optional: Continuing Ed. Course – Hyperion Student & Academic Report Access for UNM Employees</p>
<p>Disability Information Inquiry OEO and Accessibility Services Only</p>	<p>Need inquiry access to a variety of student information including disability and services provided information through Internet Native Banner (INB).</p> <p><i>This role is only for OEO and Accessibility Services personnel.</i></p>	<p>1. Securing Private Data Exam (Web Course) 2. Banner Fundamentals & Navigation Competency Exam (Web Course) (30min) 3. Viewing Student Data Training (Web Course) 4. Disability Access Training (Registrar's Office) 5. *Optional: Student and Academic Report Access (Web Course) OR *Continuing Ed. Course- Hyperion Student & Academic Report Access for UNM Employees</p>
<p>Disability Information Updater (Includes Disability Information Inquiry) OEO and Accessibility Services Only</p>	<p>Update student disability and services provided information through Internet Native Banner (INB).</p> <p><i>This role is only for OEO and Accessibility Services personnel.</i></p>	<p>1. Securing Private Data Exam (Web Course) 2. Banner Fundamentals & Navigation Competency Exam (Web Course) (30min) 3. Viewing Student Data Training (Web Course) 4. Disability Access Training (Registrar's Office) 5. *Optional: Student and Academic Report Access (Web Course) OR *Continuing Ed. Course- Hyperion Student & Academic Report Access for UNM Employees</p>