

Instructions – Request for Finance Access

This form is used to request access to Banner Finance forms and WebFOCUS reports, Perceptive Content finance access, General ASPIRE access and web form access (Check Request and Reallocation of Expenditures).

1. Check the appropriate box – New, Change, or Additional
 - a. New request – for users who do not currently have a Finance access form on file
 - b. Change request – for users who have changed departments and/or duties – only the access requested on the form will be given. Other access will be deleted, if applicable.
 - c. Additional request – for additional access needed. Current access will be kept. NOT to be used for individuals who have changed departments.
2. Fill in the following data in the spaces provided
 - a. Name
 - b. Current user ID
 - c. Title
 - d. Office Phone Number
 - e. Department
 - f. Department Code(s) – Financial Services will fill this in if you don't know your department code. You will be granted access to just your department unless your job requires you to view financial data for other departments.
 - For student organization access, index numbers can be used, if appropriate
3. **If you should have access the same as another individual**, you can fill in the user ID or name of the individual whose access should be duplicated in the blank line following 'Access same as'
 - a. Indicate the areas where the access should be duplicated: Banner (would include report access), Perceptive Content, Web Forms, and/or ASPIRE
 - b. **Do not fill out additional information.**
 - c. The form can be signed and forwarded to Financial Information Systems.
4. If duplicating another individual's access is not appropriate/wanted, then fill out the appropriate access needed. (See below for additional information regarding access.)
5. Once access information is completed, type in the name of the supervisor who will be signing the form and print the form for signatures.
6. The applicant and supervisor should read the FERPA, Access privilege and certification statements and then each should sign and date the form.

The completed form can be faxed to 487-2119 or sent to Financial Information Systems – fis@mtu.edu. If you have any questions, please contact Financial Information Systems at 487-2239 or 487-2699.

Banner Finance Access Section

Typical finance users check:

- **Query access to finance forms, finance self-service and finance reports.** This provides inquiry access to account balances, purchase requisitions, purchase orders, invoices, inter-account bills, other accounting transactions and a variety of financial reports.

Please review notations regarding other Banner access to determine what access is needed.

Selections under Department Specific Access should only be made for individuals within the departments noted.

Student organization access is given to select members of student organizations. The access is specific to the organization noted.

If you know a specific form and/or report for which access is needed or other access, it can be noted in the Other section.

Web Forms Access

- **Check Request** – access to web form to request checks for non-purchase order expenses
- **Reallocation of Expenditures** - access to web form to request reallocation of expenditures to a different index or account code

Perceptive Content Access

Please review the access available to determine appropriate access needed.

If you need access to departmental workflow queues for approving blanket order invoices and/or PO Receivers, check Other and note the access needed. (Name of department and approval type - invoices and/or receivers or name of the workflow queue(s).) Please note - being added as an authorized user on a blanket order is required prior to approving invoices.

If you are an equipment coordinator and need to request access to equipment photos in Perceptive Content, check Other and note Equipment Photos in the space provided.

ASPIRE Access

Please review notations regarding ASPIRE access to determine what access is needed. Individuals named as space coordinators or back-up space coordinators are automatically given access to space information in ASPIRE. Others that need access can check the box to receive access.

Classroom technology update access is normally given to appropriate individuals in Information Technology.

For questions about the ASPIRE Web Application, please contact ASPIRE at aspirehelp-l@mtu.edu.