



TSU Banner Security Access Request Process

The Office of Technology Services has completed a project to update Banner Security, from revamping security classes and groups to upgrading the request and access review processes. This document will outline the new procedure for requesting Banner access.

The following procedure replaces the old Excel request form. Those forms will no longer be accepted as valid Banner access requests. We will also no longer accept access requests via email or phone.

TSU policy and state audit requires that “Access to University networks and systems should be granted on a least privilege model, wherein users are granted only the access required to perform their job duties”.

Banner Access Overview

Banner is separated into several primary functional areas or modules. These include:

- Accounts Receivable
- Advancement
- Finance
- Financial Aid
- General
- Human Resources
- Payroll
- Student

Banner 9 Admin pages allow functional/administrative users to view, create, modify, and/or delete records in the Banner database, depending upon their access level. Access levels fall into two categories:

- Query – allows a user to only view records
- Maintenance – allows a user to view, create, modify, and/or delete records

Banner access is provisioned by assigning a user membership to a security Group or Groups. Security Groups are defined by **general job/position functionality or a role-based model**. Each Group contains one or more security Classes; each Class contains Banner objects (Admin pages, jobs, etc.) that are related based on **job/position and Banner functionality**.

- Security Groups
 - Role-based
 - Named based on Banner module and job/position functionality
 - Example: TSU_FA_COUNSELOR_G
- Security Class
 - Banner functionality related to job/position
 - Named based on:
 - Job/position and Banner functionality



- Banner module
- Access level (QRY or MNT), object type (RPT [Report], PRC [Process])
- Examples: TSU_STU_REG_HIST_QRY_C, TSU_STU_AR_PRC_C

Each Banner module is managed by a Banner Security Officer (BSO). The responsibilities of the BSO for each module include:

- Review of each Banner access request and, if necessary, collaborate with supervisors/managers making the request to ensure the proper access is requested based on the user's job responsibilities.
- Make a decision on each access request; approve, deny.
- Perform a periodic review of all users' access to determine if access for each is still appropriate; request adjustments as necessary. Periodic review will occur quarterly.
 - Access to the various Admin pages **should be restricted to a user's job function**; this means users should not have access to Admin pages and data that is unrelated to their duties as a TSU employee.

General Banner access request procedure:

- It is determined that an employee needs new/modified Banner access
- Supervisor collaborates with appropriate BSO(s) to determine the appropriate access (if necessary) and submits access request
- BSO reviews and approves access request
- OTS Applications receives the request and approval, executes the security change as requested

This process will be used for **both** adding and removing access. However, **it is not intended for employees who are leaving TSU completely to remove their access**. The current ESA process will continue to manage access removal for those situations. It is intended to remove access for employees moving from one department to another; the department that the employee leaves should submit a request for access removal if their new job does not include the same responsibilities and, thus, require the same access.



New Banner Access Procedure

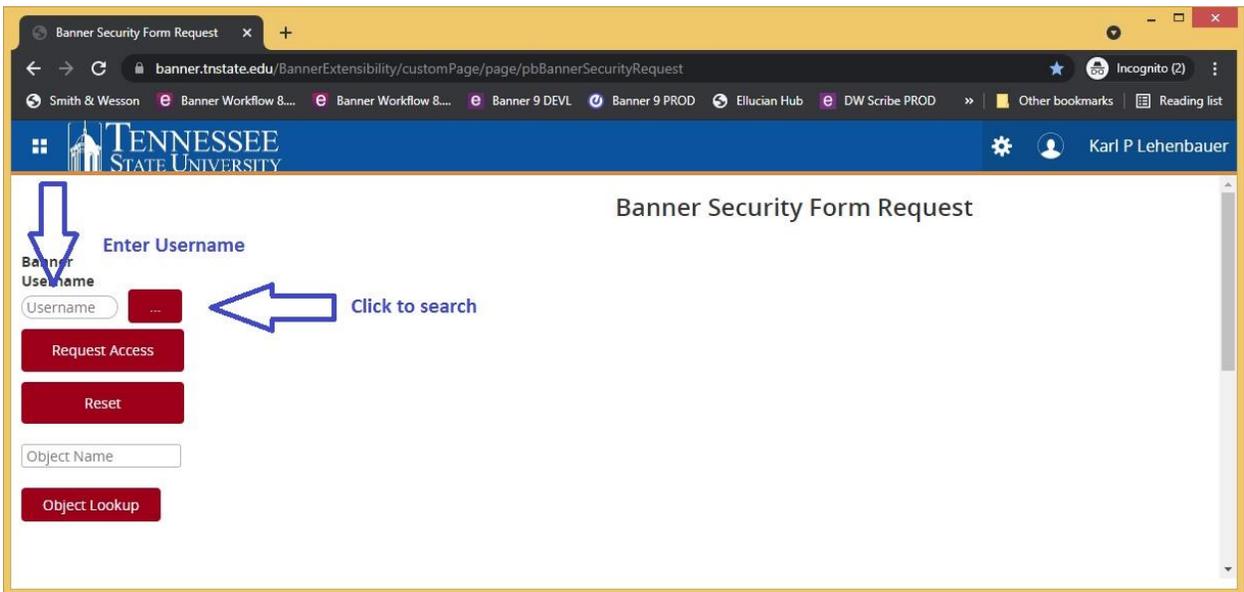
NOTE: this process should be completed by supervisors/managers in order to ensure accurate and appropriate access is being requested for an employee relevant to his/her job responsibilities.

1. Log into myTSU; click on Banner Services; click Employee tab; click Banner Security Request link.

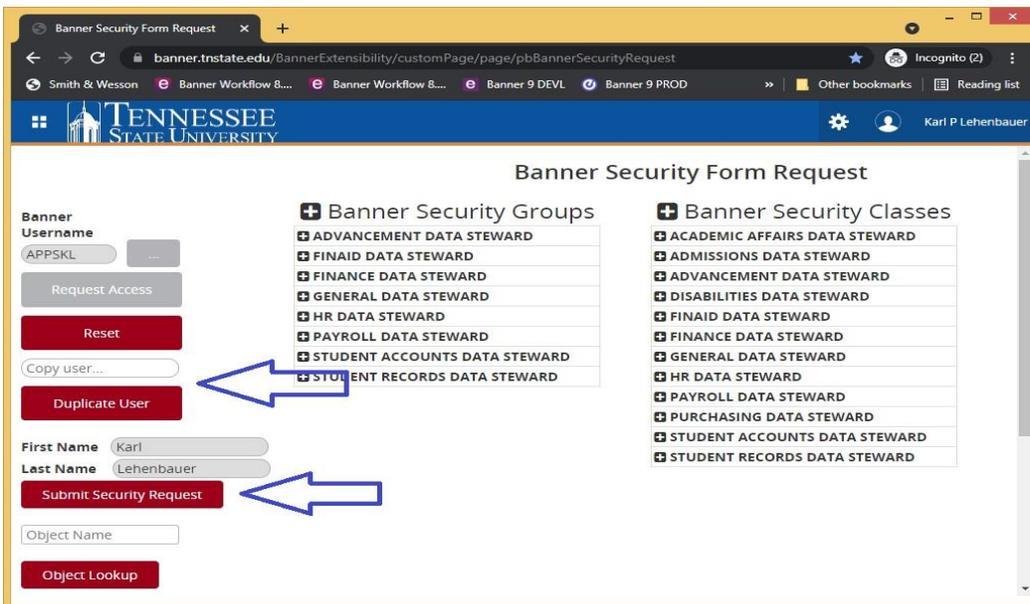
The screenshot shows a web browser window displaying the Ellucian Banner 9 Employee Dashboard. The browser's address bar shows the URL <https://hum-bannerssb.tnstate.edu/pls/PRC>. The page features a navigation menu with tabs for 'Student', 'Financial Aid', and 'Employee'. Below the menu is a search bar and a 'Go' button. The main content area is titled 'Employee' and lists several links: 'Time Sheet', 'Leave Report', 'Benefits and Deductions' (with subtext: 'Retirement, health, flexible spending, miscellaneous, beneficiary, open enrollment, Benefit Statement.'), 'Pay Information' (with subtext: 'Direct deposit allocation, earnings and deductions history, or pay stubs.'), 'Tax Forms' (with subtext: 'W4 information, W2 Form, T4 Form or 1095-C Statement.'), 'Leave Balances', 'TSU Get Edison ID', 'Banner 9 Employee Dashboard' (with subtext: 'Click here to go to your employee Dashboard'), and 'Banner Security Request' (with subtext: 'Request access to Banner administration application (Banner 9). To be used by Supervisors/Managers.'). The 'Banner Security Request' link is circled in red. At the bottom of the page, there is a 'RELEASE: 8.9.1.3' notice and a copyright notice: '© 2021 Ellucian Company L.P. and its affiliates.'



2. Enter the username of the employee for whom you are requesting access; use the ellipsis button to search if you do not know the username.



3. Click Request Access
4. **If you wish for this employee's access to mirror another employee's access**, simply enter the username of the employee to mirror in the "Copy user..." field, click Duplicate User, then click Submit Security Request. This completes the request; close the request window



5. **After collaboration with the appropriate BSO(s)***, expand the Security Group area that pertains to the needed access. Place a check next to the appropriate Group(s) that are required for this request. Open all Group areas to select additional Group membership; **you do not need a separate request for each Banner area; complete all Group requests at once.**



- a. * Collaboration with the Banner Security Officer(s) is **critically important** to ensure that the employee gaining access is being provisioned access to Banner screens that are appropriate to the employee’s job responsibilities. Failure to collaborate and provisioning inappropriate access can cause unwanted results on student/employee records in Banner and can also result in an unsatisfactory finding on internal and state audits.

Group	Description
<input type="checkbox"/>	TSJ_FA_ADVANCEMENT_G Group for Financial Aid Advancement
<input type="checkbox"/>	TSJ_FA_AUDITOR_G Group for Financial Aid Auditor
<input checked="" type="checkbox"/>	TSJ_FA_COUNSELOR_G Group for Financial Aid Counselors
<input type="checkbox"/>	TSJ_FA_DIRECTORS_TECHNICAL_G Group for Financial Aid Directors Technical
<input type="checkbox"/>	TSJ_FA_EDFINANCIAL_G Group for Financial Aid Ed. Financial
<input type="checkbox"/>	TSJ_FA_GENERAL_G Group for Financial Aid General Access
<input type="checkbox"/>	TSJ_FA_LCAN_COORDINATOR_G Group for Financial Aid Loan Coordinator
<input type="checkbox"/>	TSJ_FA_R2T4_COORDINATOR_G Group for Financial Aid Return of Title II/ Coordinator
<input type="checkbox"/>	TSJ_FA_SUPERVISORS_G Group for Financial Aid Supervisor
<input checked="" type="checkbox"/>	TSJ_FA_USERS_G Group for all Financial Aid Users

6. Once all appropriate Group membership boxes are checked, click Submit Security Request. Close request window.
 - a. **NOTE:** it is typically unnecessary to select specific Classes be added to an employee’s access profile. By and large, access is granted through the Groups and those are the items that should be marked for update. It may become necessary for Objects to be added to Classes and/or Classes added to Groups; this is a discussion for BSOs and OTS.
7. The request is now sent to all appropriate BSOs for review and decision. If approved, the request will be sent to OTS Applications for updating of the employee’s access. Email notifications will be sent throughout the process to indicate the progress of the request.

General Banner access removal request procedure

- It is determined that an employee needs Banner access removed (i.e. employee moves from one department to another)



- The department losing the employee should access the same Banner Security Request page in Banner Self-Service to review current access of the leaving employee
 - Follow the same steps as if initiating access requests (i.e. enter employee username, click Request Access, expand Banner Security Group areas)
 - The employee's current access will be seen with checkmarks next to each group to which the employee has access
 - Uncheck all appropriate access to be removed
 - Click Submit Security Request button when finished
- BSO reviews and **approves** access removal request
- OTS Applications receives the request and approval, executes the security change as requested

Additional Request Form Functionality

The new request form makes it easier to determine which Group is appropriate for access requests, to see what Classes are in each Group, and to determine which Banner Admin page, report, and/or process are in each class.

- Each Banner Security Group on the request page expands to show the separate Groups within that Banner area.
- Each Group listed has a general description and is a link that opens a separate window. This window details what Security Classes are contained in that Group and includes a description of each class.



Banner Page Builder - Google Chrome

banner.tnstate.edu/BannerExtensibility/customPage/page/pbBannerSecReqGroupPopup?group_name=TSU_FA_COUNSELOR_G

TENNESSEE STATE UNIVERSITY Karl P Lehenbauer

Group Classes

TSU_FA_COUNSELOR_G
Group for Financial Aid Counselors

Class	Description
TSU_AR_GENL_QRY_C	Tennessee State U Accounts Receivable General Query-only Class This class provides access to Accounts Receivable module query forms such as TGIACCD (Account Detail Query) and query-only access to maintenance form TGACREV (Cashier Session Review).
TSU_AR_QRY_C	Tennessee State U Accounts Receivable Query-only Class This class provides access to Accounts Receivable module query forms such as TSICONT (Contract Person Query) and TSIQACT (Student Payment Detail Query) and query-only access to maintenance forms such as TSADETL (Student Account Detail).
TSU_AR_STUD_3P_QRY_C	Tennessee State U Accounts Receivable Third-party Contract Query-only Class This class provides query access to Accounts Receivable module third-party contract forms such as TSACONP (Contract Person Authorization) and TSACONT (Contract Authorization).
TSU_AR_STUD_QRY_C	Tennessee State U Accounts Receivable Student Query-only Class This class provides access to Accounts Receivable module student query forms such as TSICONT (Contract Person Query) and TSIQACT (Student Payment Detail Query) and query-only access to maintenance forms such as TSADETL (Student Account Detail).
TSU_AR_VALTAB_QRY_C	Tennessee State U Accounts Receivable Validation Tables Query-only Class This class provides query-only access to all Accounts Receivable module validation tables and should be granted to anyone who has any other Accounts Receivable classes.
TSU_FA_CMMN_MNT_C	Tennessee State U Financial Aid Common Maintenance Class. This class provides maintenance access to Financial Aid module Common forms such as ROAINST (Institution Financial Aid Options Form) and ROAMGMT (Funds Management). These are sensitive forms and should be carefully restricted.



- Each Class listed is also a link that will open another window. This window details what Banner objects (Admin page(s), report(s), process(es)) are contained in that class.

Banner Page Builder - Google Chrome

banner.tnstate.edu/BannerExtensibility/customPage/page/pbBannerSecReqClassPopUp?class_name=TSU_AR_GENL_QRY_C

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Class Objects

TSU_AR_GENL_QRY_C
Tennessee State U Accounts Receivable General Query-only Class This class provides access to Accounts Receivable module query forms such as TGIACCD (Account Detail Query) and query-only access to maintenance form TGACREV (Cashier Session Review).

Form/Process	Version	Module	Description	Type	Job Type	Role
TGACOLC	8.4.4	Accounts Receivable	Collections	Oracle Forms module		Query-Only
TGACOMC	8.4.4	Accounts Receivable	Comment Central	Oracle Forms module		Query-Only
TGACPRF	8.4.4	Accounts Receivable	Customer Profile Definition	Oracle Forms module		Query-Only
TGACREV	8.2.0.1	Accounts Receivable	Cashier Session Review	Oracle Forms module		Query-Only
TGACTRL	8.0	Accounts Receivable	Accounts Receivable Billing	Oracle Forms module		Query-Only
TGADEPC	8.0	Accounts Receivable	Deposit Detail Control	Oracle Forms module		Query-Only
TGAMESG	8.0	Accounts Receivable	Billing Message	Oracle Forms module		Query-Only
TGARCPPT	8.2	Accounts Receivable	Receipt	Oracle Forms module		Query-Only
TGARETC	8.0	Accounts Receivable	Returned Check Code Cont	Oracle Forms module		Query-Only
TGARRAS	8.2	Accounts Receivable	Recurring Receivables Assig	Oracle Forms module		Query-Only
TGIACCD	8.3	Accounts Receivable	Account Detail Query	Oracle Forms module		Maintenance
TGICOLC	8.1	Accounts Receivable	Collections Query	Oracle Forms module		Maintenance
TGIRCPT	8.5	Accounts Receivable	Receipt Query	Oracle Forms module		Maintenance
TGISTMT	8.0	Accounts Receivable	Statement and Payment His	Oracle Forms module		Maintenance
TGIUPRF	8.0	Accounts Receivable	User Profile Query	Oracle Forms module		Maintenance

- The details on each Banner object include name, version, Banner module to which it belongs, a short description, and the access level (Role) that will be assigned.



- Expanding the Banner Security Classes section on the request page will provide similar functionality; the ability to review details based on the Security Class name.

The screenshot shows a web browser window with the URL `banner.trnstate.edu/BannerExtensibility/customPage/page/pbBannerSecurityRequest`. The page header includes the Tennessee State University logo and the user name Karl P Lehenbauer. The main content area is divided into three sections:

- Banner Username:** A form with a text input containing "APPSKL", a "Request Access" button, a "Reset" button, a "Copy user..." button, and a "Duplicate User" button. Below this are fields for "First Name" (Karl) and "Last Name" (Lehenbauer), a "Submit Security Request" button, an "Object Name" input field, and an "Object Lookup" button.
- Banner Security Groups:** A list of expandable groups, each with a plus icon and a minus icon. The groups are: ADVANCEMENT DATA STEWARD, FINAID DATA STEWARD, FINANCE DATA STEWARD, GENERAL DATA STEWARD, HR DATA STEWARD, PAYROLL DATA STEWARD, STUDENT ACCOUNTS DATA STEWARD, and STUDENT RECORDS DATA STEWARD.
- Banner Security Classes:** A list of expandable classes, each with a plus icon and a minus icon. The classes are: ACADEMIC AFFAIRS DATA STEWARD, ADMISSIONS DATA STEWARD, ADVANCEMENT DATA STEWARD, DISABILITIES DATA STEWARD, and FINAID DATA STEWARD. Below the "FINAID DATA STEWARD" header is a table with two columns: "Class" and "Description".

Class	Description
<input type="checkbox"/> TSU_FA_3P_RULES_MNT_C	Tennessee State U Financial Aid Third-party Rules Maintenance Class
<input type="checkbox"/> TSU_FA_3P_RULES_QRY_C	Tennessee State U Financial Aid Third-party Rules Query-only Class
<input type="checkbox"/> TSU_FA_API_MNT_C	Tennessee State U Financial Aid API Maintenance Class
<input type="checkbox"/> TSU_FA_ATHL_MNT_C	Tennessee State U Financial Aid and Athletics maintenance class
<input type="checkbox"/> TSU_FA_ATHL_PRC_C	Tennessee State U Financial Aid and Athletics Process class
<input type="checkbox"/> TSU_FA_ATHL_QRY_C	Tennessee State U Financial Aid and Athletics Query-only class



- Using the Object Lookup function provides more information based on a single Banner object. Enter the Banner name of the object (Admin page, report, process) and click Object Lookup. This will open a new window.

The screenshot shows the Banner Security Form Request page. The browser address bar displays `banner.tnstate.edu/BannerExtensibility/customPage/page/pbBannerSecurityRequest`. The page header includes the Tennessee State University logo and the user name Karl P Lehenbauer. The main content area is divided into three sections:

- Banner Username:** A form with a text input containing "APPSKL", a "Request Access" button, a "Reset" button, a "Copy user..." button, and a "Duplicate User" button.
- Banner Security Groups:** A list of steward roles with expandable icons: ADVANCEMENT DATA STEWARD, FINAID DATA STEWARD, FINANCE DATA STEWARD, GENERAL DATA STEWARD, HR DATA STEWARD, PAYROLL DATA STEWARD, STUDENT ACCOUNTS DATA STEWARD, and STUDENT RECORDS DATA STEWARD.
- Banner Security Classes:** A list of steward roles with expandable icons: ACADEMIC AFFAIRS DATA STEWARD, ADMISSIONS DATA STEWARD, ADVANCEMENT DATA STEWARD, DISABILITIES DATA STEWARD, FINAID DATA STEWARD, FINANCE DATA STEWARD, GENERAL DATA STEWARD, HR DATA STEWARD, PAYROLL DATA STEWARD, PURCHASING DATA STEWARD, STUDENT ACCOUNTS DATA STEWARD, and STUDENT RECORDS DATA STEWARD.

At the bottom of the form, there are fields for "First Name" (Karl) and "Last Name" (Lehenbauer), a "Submit Security Request" button, a text input containing "TSAAREV", and an "Object Lookup" button. A blue arrow points to the "Object Lookup" button.



- The Object Lookup window displays **all** the Classes to which the object has been assigned and all the Groups for each of those Classes. Looking at the Class name, one can determine the access level and object type.

Banner Page Builder - Google Chrome

banner.trnstate.edu/BannerExtensibility/customPage/page/pbBannerObjectLookup?objectName=TSAAREV

Search Criteria: " TSAAREV "

Name	Object Description	Module	Group	Group Description	Class	Class Description
TSAAREV	Account Detail Review Form - St	Accounts Receivable	TSU_ALL_USERS_G	Group for all Banner Users	TSU_AR_QRY_C	Tennessee State U Accounts Rece
TSAAREV	Account Detail Review Form - St	Accounts Receivable	TSU_AR_ACCOUNT_CLERK_G	Group for Student Accounts Fed	TSU_AR_CASH_MNT_C	Tennessee State U Accounts Rece
TSAAREV	Account Detail Review Form - St	Accounts Receivable	TSU_AR_ACCOUNT_CLERK_G	Group for Student Accounts Fed	TSU_AR_QRY_C	Tennessee State U Accounts Rece
TSAAREV	Account Detail Review Form - St	Accounts Receivable	TSU_AR_ACCOUNT_CLERK_G	Group for Student Accounts Fed	TSU_AR_STUD_MNT_C	Tennessee State U Accounts Rece
TSAAREV	Account Detail Review Form - St	Accounts Receivable	TSU_AR_BURSAR_G	Group for Student Accounts Bur	TSU_AR_CASH_MNT_C	Tennessee State U Accounts Rece
TSAAREV	Account Detail Review Form - St	Accounts Receivable	TSU_AR_BURSAR_G	Group for Student Accounts Bur	TSU_AR_STUD_MNT_C	Tennessee State U Accounts Rece
TSAAREV	Account Detail Review Form - St	Accounts Receivable	TSU_AR_CASHIER_G	Group for Student Accounts Cas	TSU_AR_CASH_MNT_C	Tennessee State U Accounts Rece
TSAAREV	Account Detail Review Form - St	Accounts Receivable	TSU_AR_CASHIER_G	Group for Student Accounts Cas	TSU_AR_STUD_MNT_C	Tennessee State U Accounts Rece
TSAAREV	Account Detail Review Form - St	Accounts Receivable	TSU_AR_GENERAL_G	Group for Student Accounts Ger	TSU_AR_QRY_C	Tennessee State U Accounts Rece
TSAAREV	Account Detail Review Form - St	Accounts Receivable	TSU_AR_GRADUATE_ANALYST_G	Group for Student Accounts Gra	TSU_AR_CASH_MNT_C	Tennessee State U Accounts Rece
TSAAREV	Account Detail Review Form - St	Accounts Receivable	TSU_AR_GRADUATE_ANALYST_G	Group for Student Accounts Gra	TSU_AR_STUD_MNT_C	Tennessee State U Accounts Rece
TSAAREV	Account Detail Review Form - St	Accounts Receivable	TSU_AR_MANAGER_G	Group for Student Accounts Mai	TSU_AR_CASH_MNT_C	Tennessee State U Accounts Rece
TSAAREV	Account Detail Review Form - St	Accounts Receivable	TSU_AR_MANAGER_G	Group for Student Accounts Mai	TSU_AR_QRY_C	Tennessee State U Accounts Rece
TSAAREV	Account Detail Review Form - St	Accounts Receivable	TSU_AR_MANAGER_G	Group for Student Accounts Mai	TSU_AR_STUD_MNT_C	Tennessee State U Accounts Rece
TSAAREV	Account Detail Review Form - St	Accounts Receivable	TSU_AUDITOR_ALL_G	Group for Auditor Query Access	TSU_AR_QRY_C	Tennessee State U Accounts Rece
TSAAREV	Account Detail Review Form - St	Accounts Receivable	TSU_FA_COUNSELOR_G	Group for Financial Aid Counselo	TSU_AR_QRY_C	Tennessee State U Accounts Rece
TSAAREV	Account Detail Review Form - St	Accounts Receivable	TSU_FA_DIRECTORS_TECHNICAL	Group for Financial Aid Director	TSU_AR_STUD_MNT_C	Tennessee State U Accounts Rece
TSAAREV	Account Detail Review Form - St	Accounts Receivable	TSU_FA_EDFINANCIAL_G	Group for Financial Aid Ed. Finar	TSU_AR_ACCT_ADM_IJ_C	Tennessee State U Accountant Ac
TSAAREV	Account Detail Review Form - St	Accounts Receivable	TSU_FA_LOAN_COORDINATOR_G	Group for Financial Aid Loan Coi	TSU_AR_QRY_C	Tennessee State U Accounts Rece
TSAAREV	Account Detail Review Form - St	Accounts Receivable	TSU_FIN_AP_PAY_MGR_G	Group for Finance Payroll Manaj	TSU_AR_QRY_C	Tennessee State U Accounts Rece

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