

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 job title: \_\_\_\_\_ Employee's home index/org number: \_\_\_\_\_

Employee's CofC ID number (CWID): \_\_\_\_\_ Employee's email address: \_\_\_\_\_ Employee's telephone number: \_\_\_\_\_

**Please select position with the College (select one):**

Faculty      Staff      Student

**Please select employment type (select one):**

Permanent      Temporary

**College of Charleston Non-Disclosure Agreement**

This agreement is to ensure that College of Charleston (the College) employees, who have access to information that contains personal, and/or confidential information, about College employees, students, other individuals, or financial information (hereinafter "records") are aware of their responsibility to maintain the privacy and security of such records.

College of Charleston employees are authorized to access and modify records only to the extent necessary to perform their assigned job duties. Employees who have access to these records are responsible for protecting them from unauthorized access and inappropriate disclosure.

1. I have read the College of Charleston Privacy Policy and understand it, as well as the FERPA information on the Office of the Registrar's website.
2. I will access records only as required to perform my assigned job duties.
3. I will store and protect records under secure conditions and make every effort to maintain their confidentiality.
4. I will not divulge, copy, release, sell, loan, review, alter, or destroy records except as properly authorized by the appropriate College of Charleston official, within the scope of applicable state or federal laws, record retention schedules, internal policies, and departmental procedures.
5. I will forward all Freedom of Information Act requests, and all other external data requests, to the CofC Office of Legal Affairs for approval prior to releasing any data.
6. I will forward all campus requests for "directory" information, which may include a student's name, address, telephone, major, class standing, enrollment status, participation in any officially recognized activities and sports, weight or height of members of athletic teams, dates of attendance, or degrees awarded, to the Office of the Registrar, recognizing that these have to be screened for students who have placed holds on the release of personal information.
7. I will not allow any other person to log in to MyCharleston, Internet-Native Banner (INB), Self-Service Banner (SSB), BDM, or any other College electronic system, with my user name and password.
8. I will not use the login ID and password of any other person to access any College of Charleston electronic system.
9. If I do not know or understand the proper procedure for recording, updating, or deleting an electronic record, I will ask someone for assistance and/or training before modifying that record.

I have read the College of Charleston Non-Disclosure Agreement and agree to comply with its provisions. I understand that failure to comply may result in disciplinary action.

Employee's signature: \_\_\_\_\_

Date: \_\_\_\_\_

Employee's name:

Employee's CofC ID number (CWID):

Describe why your job requires Finance SSB access:

I am requesting access to:

**NOTE:** Please check all that apply. Department Head or the Department Heads Supervisor (if DH requesting access) **MUST** initial next to all that are approved.

Department  
Head initials  
(Required)

**Banner SSB Finance** (BAN\_COFC\_F\_GENERAL\_REPORTS) **AND** **Cognos Finance Consumer** **AND** **eProcure**. This role includes access to financial and budget transactions.

**Human Resources reports** (BAN\_COFC\_F\_HR\_REPORTS). This role allows access to payroll and compensation information on NHRDIST in ePrint for all indexes in which the person has SSB access.

**Budget Transfer** (BAN\_COFC\_F\_REQUIRED\_BUDGET\_ADJ). This role grants access to end-users with established finance access to Internet Native Banner (INB). This access will allow end-users to enter budget transfers, review available balances for non-sufficient funds checking, review finance data by account, and execute detailed searches.

**eProcure ONLY** access. I am not requesting access to Financial or Human Resources data. This role allows users to enter and assign carts in eProcure.

I am requesting security to the following indexes:

**NOTE:** Please complete the index number, name, fund, organization, and program for each index. If you do not know this information, please ask your Department Head, or someone with access to Finance ePrint, and refer to the Account Index Report (FGRACCI) to find this information.

Supervisor  
initials  
(Required)

Index

Index name

Fund

Organization

Program

**NOTE:** The requesting employee is responsible for ensuring that proper training is obtained.

**NOTE:** The requesting employee cannot approve their own access.

### Department Head or Department Heads Supervisor's (if DH requesting access) Authorization

I approve the requested access for this employee. In the event the employee transfers departments or is no longer employed by the College of Charleston, I will immediately notify HR, IT, and the Financial Security Coordinator to terminate access.

Printed name (required)

Title (required)

Siganture (required)

Date (required)

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: \_\_\_\_\_

Joshua D. Williams, or designee

Controller (Finance Data Steward):

\_\_\_\_\_ Date: \_\_\_\_\_

Patrick M. Fillippa, 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: \_\_\_\_\_