Instructions for Banner HR Security Request

Step 1

- Go to OneStop
- Click on the Tools tab
- Under the Banner heading, click on Banner Security Request

Requests for Banner Security are routed to your supervisor for approval. If your supervisor has not claimed you in the Reporting Structure tool on OneStop, the Banner Security Request application will display a message in RED at the top of the form. If this message appears, your supervisor will need to go to the Reporting Structure application on OneStop and key in your pirate ID at the bottom of the screen. After they claim you, you will get an e-mail notification and you must then accept them as your supervisor by going to the Reporting Structure and clicking on approve next to their name.

If someone has claimed you as your supervisor, they will appear in the Supervisor Information section of the security application.

<table>
<thead>
<tr>
<th>Requester Information</th>
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<tbody>
<tr>
<td>ECU ID</td>
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</table>

If the displayed Supervisor Pirate ID is NOT correct, click the ‘UPDATE’ action link. If a message is displayed, please refer to the message to determine any further action.

<table>
<thead>
<tr>
<th>Supervisor Information</th>
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<tr>
<td>Pirate ID</td>
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If Supervisor Information is correct, you are ready to proceed with your request for Banner security.

Step 2

- Click on the Human Resources link (click on the words, not the box). HR Security requires you to complete the HR Security Questionnaire. IMPORTANT: Each HR Security Request replaces previous HR requests. Be sure to include everything you need on this request.

Timesheet Approval

- If you will be approving timesheets for SPA Temps or Students – check YES (If NO, skip to the EPAF Information section)
- If you checked YES, you need to select the time sheet organization(s) for which you will approve time. Click on the appropriate org code(s). Hold your CTRL key to select more than one. Note: timesheet orgs should always be 6-digit numbers.
- Next you need to indicate whether you are the first or second approver. If you will be the first or the only person to approve timesheets for the selected org(s), Click on the first radio button – I am the primary person responsible for approving timesheets.
- If you are the second approver, click on the second radio button – I am the additional approver required by my department.
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EPAF Information

- Please indicate whether you will be initiating Electronic Personnel Action Forms (EPAFs) for your department.
- Will you be approving EPAFs? Select one of the following from the dropdown:
  - No, I will NOT be approving EPAFs.
  - Yes, but ONLY as a PROXY for someone else
  - Yes, I will be a primary approver.
- If you indicated that you are a primary approver, you must indicate the level at which you are authorized to approve. If you indicate that you are an approver at a certain level, your name will appear in the drop down box for that level on the routing section of the EPAF form.
- If you approve but ONLY as a PROXY for someone else, DO NOT select a level.

Approval Proxy Assignment

If you approve either timesheets or EPAFs or both, you must provide the pirate id’s of the people you intend to setup as proxies. Every approver must have a proxy to approve timesheets or EPAFS in their absence.

- In the Approval Proxy Assignment box, enter the pirateid (not Banner ID) of your proxy, and click ADD (please note that once your security request has been approved you will need to manually add...
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your proxy via Banner Self Service). The security application just places their name in the appropriate drop down box for the proxy setup process.

- Instructions for setting up **Timesheet proxy** can be found in the Approval Process for Web Time Entry Manual available here (requires login with your pirateid and password): https://www.ecu.edu/cs-itcs/banner/secure/accessstrainingmaterials.cfm
- Instructions for setting up **EPAF proxy** are available here: http://www.ecu.edu/cs-admin/humanresources/customcf/HRIS/How_to_setup_EPAF_Proxy_Approver.pdf

- When your **HR Security Questionnaire** is complete, click the submit button. You should now be back on the original page. The **Human Resources** box should now contain a checkmark.
- If you are requesting access to any **Third Party** products or if you are requesting access to **Sensitive Data** necessary for your job function, check the appropriate boxes in those sections of the form.
- Please enter any **comments** necessary to clarify your needs or to explain the reason for your request. If you are requesting approval authority for **Mass Time Entry (MTE)**, you must indicate that in the comments section. **IMPORTANT: Each HR Security Request replaces previous HR requests. Be sure to include everything you need on this request.**

If the module name is a hyperlink, the module has requirements which you can view or complete by clicking the link. If the check box contains an 'X', you already have an active request for that module. Concurrent requests for access to the same module are not allowed.

- When your form is complete, click the submit button. You should receive a message that says **Your request was submitted successfully.** This security request will now display in the Security Request History section at the bottom of the page where you can track its progress.
Instructions for Banner HR Security Request

➤ Your request will be routed for approval to:
   1. your supervisor
   2. The HR module approver
   3. ITCS Security

➤ You will receive an automated e-mail when your request for security is complete and access has been granted.