

## Banner AR Access Requests

Follow the steps below to submit your request via the online [Banner Access Request](#) application.

If you experience technical issues logging into Banner, please contact your local IT support or the IT Helpdesk ([helpdesk@okstate.edu](mailto:helpdesk@okstate.edu) or 405-744-HELP).

1. Login to the Banner Access Request application: [https://app.it.okstate.edu/access\\_request/](https://app.it.okstate.edu/access_request/)
2. Click the orange Create Access Request button:

Once submitted, a request for access to Banner will go through a series of checks and approvals.

1. The person gaining access to Banner will need to read and sign the Banner confidentiality agreement.
2. The person gaining access to Banner will need to complete FERPA training.
3. The department head of the person gaining access to Banner will need to approve the request.
4. The approver of the module the request is for will need to approve the request.

**Create Access Request**

3. Select OSU Stillwater/Tulsa as the campus, then click Next:

Please select the campus that the user need Banner access to.

Campus:

4. Select ACCOUNTS RECEIVABLE as the Banner module, then click Next:

Please select the Banner module that the user needs access to.

Area:

5. Search for the person you're requesting access for by name or email address, then click Next. Confirm the person on the following screen by clicking the radio button next to their name, and click Next:

Please search for a user using their first and last name or their OKEY email address.

First Name:

Last Name:

- OR -

Email Address:

6. The Department Head's email should display on the next screen, or you will be prompted to enter the email address of the Department Head. Click Next.

7. Select the Banner Security Groups desired by checking the boxes to the right of the Security Group description.

If a person needs to enter bursar account transactions or use the AIRS AR upload transaction process: Check the 1<sup>st</sup> box for Maintenance access and the 2<sup>nd</sup> box for QUERY access.

If only QUERY (View) access is needed: **Only** check the 2<sup>nd</sup> box.

**Group Name:**

AR Staff and Campus Maintenance	<input type="checkbox"/>
AR Staff and Campus Query	<input type="checkbox"/>

After checking the boxes for the groups that match the person's current role, click Next.

8. Review other details of the request, and check the box to indicate INB access, if needed, then click Submit:

Comments (Optional):

Please check this box if the user needs INB access in addition to the selected security groups.

9. After the request has been submitted, the person for whom the request was made will receive an email message with a subject of, "INB Access Request Confidentiality Statement." The message will prompt him/her to login to the system and agree to the Banner access confidentiality statement.
10. The Department Head will also receive an email prompting him/her to login to the system and approve the request. Department Heads can also login to the system and click the **Pending Department Head Action** link (under the **Approver** menu) to view and approve pending requests.

## Approver

**Pending Approver Action**

**Pending Department Head  
Action**

11. Finally, the data owners of the different security groups must review & approve the request, and then it will be processed by IT. Data owners can also login to the system and click the **Pending Approver Action** link (under the **Approver** menu) to view and approve pending requests.