

SunGard Banner Finance

Self Service Setup

Please use this document to setup a new user on Finance Self Service.

FOMPROF

The screenshot shows the 'User Profile Maintenance' window in FOMPROF 7.0 (SEEDCALB). The window title bar includes 'File Edit Options Block Item Record Query Tools Help' and a toolbar with various icons. The main content area is divided into several sections:

- User ID:** A dropdown menu.
- User Name:** A text input field.
- Budget ID:** A dropdown menu.
- COA:** A dropdown menu.
- Organization:** A dropdown menu.
- Master Fund:** A dropdown menu with 'No Authority' selected.
- Master Organization:** A dropdown menu with 'No Authority' selected.
- ID:** A dropdown menu followed by a text input field.
- Phone:** Three input fields for area code, number, and extension.
- Fax:** Three input fields for area code, number, and extension.
- Email:** A text input field.
- Authorizations:** A list of checkboxes:
 - NSF Override
 - Post after Expenditure End Date
 - Post in Accrual Period
 - EDI Override
 - ACH Override
 - Purchase Card Override
 - Self Service Access
- Self-Service Budget Planner Authorizations:** A section with a checkbox for 'Self Service Budget Access' and two dropdown menus for 'Budget Master Fund' and 'Budget Master Organization'.

1. Enter in User ID – This is the ID that is provided by ETS which allows the user to sign into Banner INB.
2. [Next Block]
3. Type in user's name remembering to use the data standards set by the District.
4. Enter in Chart of Accounts "C"
5. Enter in home organization – This should be the main organization that the user's labor is expensed to.
6. Set Master Fund and Master Organization – This is per Fund / Organization Security defined by the District
7. Enter ID: This is the user's employee number. If you do not know it you can click on down arrow and complete query to find it.
8. Place Check in the Self Service Access box.
9. [Save]

GOATPAD – This step is only available in TEST. Once in PROD this will be completed by the ETS Department.

File Edit Options Block Item Record Query Tools Help

Third Party Access Audit GOATPAD 7.2 (SEEDCALB)

ID:

Current Third Party

PIN: Disabled Accepted Expiration Date:

User ID: Web Last Access Date: Activity Date:

Third Party ID: Sourced ID:

LDAP User ID:

PIN Hint Question:

PIN Hint Response:

Activity Source:

Third Party History

PIN	Third Party ID	Change	User ID	Activity Date
<input type="text"/>				
<input type="text"/>				
<input type="text"/>				
<input type="text"/>				
<input type="text"/>				
<input type="text"/>				
<input type="text"/>				
<input type="text"/>				

10. Enter ID – Number from step 7 above.

11. [Next Block]

12. Click button next to PIN field

13. [Save]

NOTE: To sign on to Banner Finance Self Service enter in ID (from step 7) and PIN. The first time Self Service will prompt the user to change PIN. Enter in Old PIN and enter in New PIN twice. PIN has to be 6 numbers.