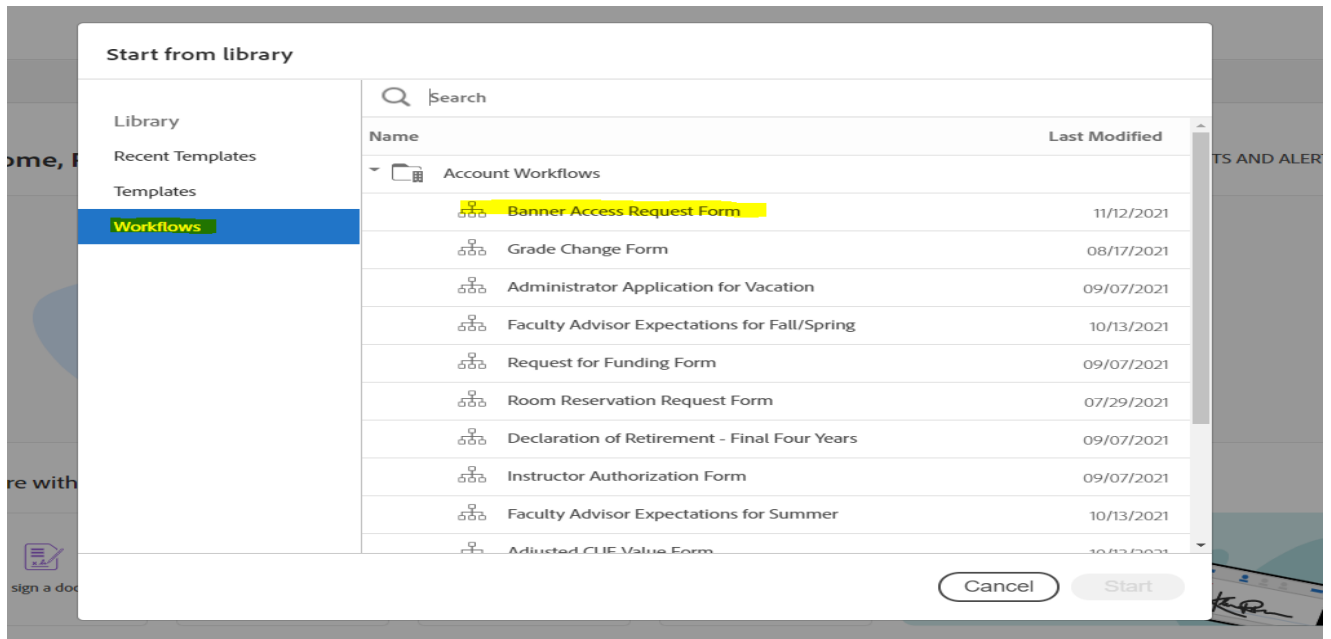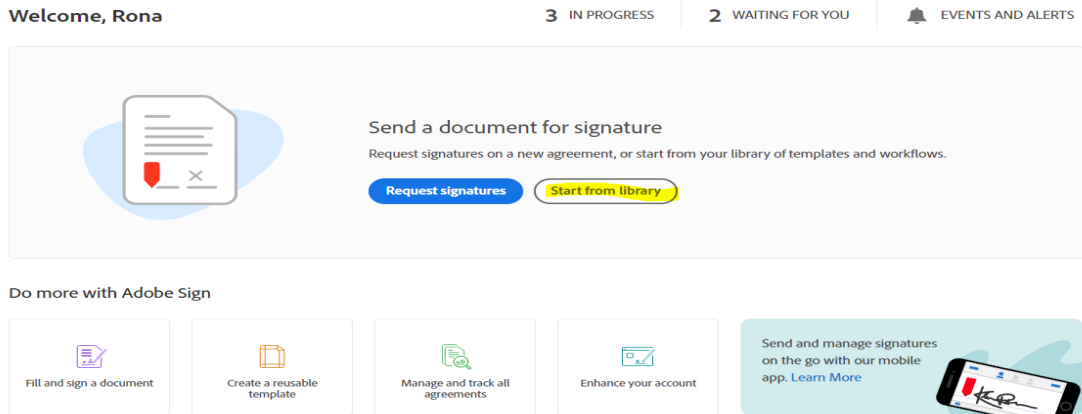# REMINDERS WHEN REQUESTING FINANCE ACCESS

(1) Have an assigned Banner username

(a) **New user** - Form is available at Adobe Echo->Start from Library->Workflows->Banner Access Request Form

Log-in to adobe echo - https://na2.documents.adobe.com/account/homeJS

Go to "start from library then to " workflows the click on "banner access request form."

(b) **Existing user** - If you forgot Banner username - contact IT Helpdesk
via phone (773) 995-3963 or via email - helpdesk@csu.edu

(2) Complete the Fiscal Officer Signature Card if you will be an approver for budget transfers and/or purchases in CSU-Buy, see attached.

REMINDER: Name, title, and UID must be provided.

(3) **NEW USER ONLY:** Complete budget training if you will be requesting budget access, see link below.

https://www.csu.edu/budget/tutorials.htm

(4) **NEW USER ONLY:** Complete CSU-buy training if you will be requesting CSU-buy access, see link below.

https://www.csu.edu/financialoperations/procurement/csubuy.htm

(5) Complete the Finance Systems Security Access Form, see attached or link below.
https://www.csu.edu/financialoperations/documents/Finance_Systems_Security%20_Access_Request_Form.pdf

REMINDER: Name, department name, banner username, email, and phone extension MUST be provided.

(6) Send the following via email to Neromi Horton (nhorton@csu.edu):

a. Name and email of your supervisor

b. Fiscal Officer Signature Card - signed by requestor only (use actual signature)*

c. Copy of budget and/or CSU-buy training certificates
NOTE: If it is not your first-time requesting access, please indicate that in your email. Training is not needed for existing users.

d. Finance Systems Security Access Form - signed by requestor only*

*All forms will be routed for approval to your supervisor.

QUESTIONS OR CONCERNS

If you have questions or concerns, please contact:

Neromi Horton via email: nhorton@csu.edu or via phone: x2042