Banner Finance

Finance Security

Introductions

- **Name**
- **Organization**
- **Title/function**
- **Job responsibilities**
- **Banner experience**
- **Expectations**

Course Goals

The goal of this workbook is to provide you with the knowledge and practice to accurately establish security within Banner Finance.

Agenda

- **Overview**
- **Set up**
- **Question and Answer**

Overview

One of the initial procedural tasks you perform in Banner Finance should be to set up your security parameters for your system. The system provides security on three levels

- Oracle security
- Banner security
- Finance system security

Set up Objectives

At the end of this section, you will be able to

- establish system wide security
- add users and define their system wide access
- establish rule group security access
- establish fund/organization security access

Set up

- **Setting up Processing Level Security**
  - System Control Maintenance form (FOASYSC)
    - Where Finance-level security can be switched off and on

Set up

- **Establishing User Profiles**
  - User Profile Maintenance form (FOMPROF)
    - Used to link user IDs to funds and organizations

Set up

- **Creating Rule Groups**
  - Rule Group/Rule Class Security Maintenance form (FOMRGRC)
    - Used to create and maintain rule groups

Set up

- **Assigning Rule Groups to User IDs**
  - Rule Group Security Maintenance form (FOMUSRG)
    - Used to assign rule groups to user IDs

Set up

- **Assigning Rule Groups to Forms and Processes**
  - Form/Process to Rule Group Maintenance form (FOMPRRG)
    - Used to assign rule groups to forms and processes

Set up

- **Assigning Funds and Fund Types to User IDs**
  - Fund/Fund Type Security Maintenance form (FOMUSFN)
    - Used to assign funds and/or fund types to user IDs

Set up

- **Assigning Organizations to User IDs**
  - Organization Security Maintenance form (FOMUSOR)
    - Used to assign organizations to user IDs

Set up Review

- **To prevent a user from processing purchase orders, would you use rule group security or fund/organization security?**
- **How do you indicate that all invoices should go through Banner's Receiving Process?**
- **What Banner form do you use to establish a user's system-wide security access and overage allowances?**

Course Summary/Review

The goal of this workbook is to provide you with the knowledge and practice to accurately establish security within Banner Finance.

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Questions and Answers

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Thank you for your participation

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