

How to gain access to Banner Finance

OVERVIEW:

Banner navigation training is required of everyone that needs to have a Banner account established. Please plan on this taking between 1 to 2 weeks given our training schedule and process of ensuring proper security. The exception to this is if you only need access to Bulldog Buyways or to run Finance reports (under the report tab) in One Port. Navigation training is not required for those two cases. However, you still need to complete the Banner Finance Access request form in #3 below and return it to Andrea Jackson at ajackson@unca.edu.

Required steps to gain access to Banner Finance are as follows:

1. Sign up to attend Banner navigation training with Adrienne Oliver in Information Technology Services (ITS) at aoliver@unca.edu or extension 5005. This class is typically offered twice a month and lasts 2 hours.
2. After completing Banner navigation training, you will need to complete a Banner Account request form. The form can be found on the UNCA [website](#). Return this form to Adrienne Oliver in ITS at CPO# 2410. Adrienne will notify you by e-mail when your Banner account has been established.
3. Next, you will need to complete a Banner Finance Access request form. The form can be found on the UNCA [website](#). When completing the form, be sure to include all fund numbers that you will need to access. The fund manager for any fund numbers listed must sign on page 2 of the form, along with your supervisor. You can scan the completed form and email it to Andrea Jackson in Finance at ajackson@unca.edu or by mail to CPO# 1422. Andrea will notify you by e-mail when your Banner Finance account has been established.
4. Once you have attended Navigation training and both of the forms in items 2 and 3 are completed accurately and received, you should be notified about your account within 48 hours.
5. Sign up to attend Banner Finance training with Giovanni Figaro. Classes are offered once a month, except for July and August. This is a one-hour class. You can contact Giovanni at gfigaro@unca.edu or at extension 6113.
6. A class is also offered in Banner Finance Self Service training. This is not a replacement for the Banner Finance training class taught by Giovanni Figaro, but it can be an easier tool to use for certain queries. You do need to attend Giovanni's class before you attend this class. Classes are offered once a month, except for July and August. This is a one-hour class. You can contact Lydia Gossett at lgossett@unca.edu or extension 6818 to sign up for the class.