

Instructions for Banner Student Access Requests via DocRoute

The [Banner Student Access DocRoute form](#) can be accessed from the [Registrar eForms webpage](#) or through the DocRoute link on the [Faculty & Staff Logins page](#).

Faculty & Staff Logins

SWITCH TO STUDENT VIEW

Popular Applications



























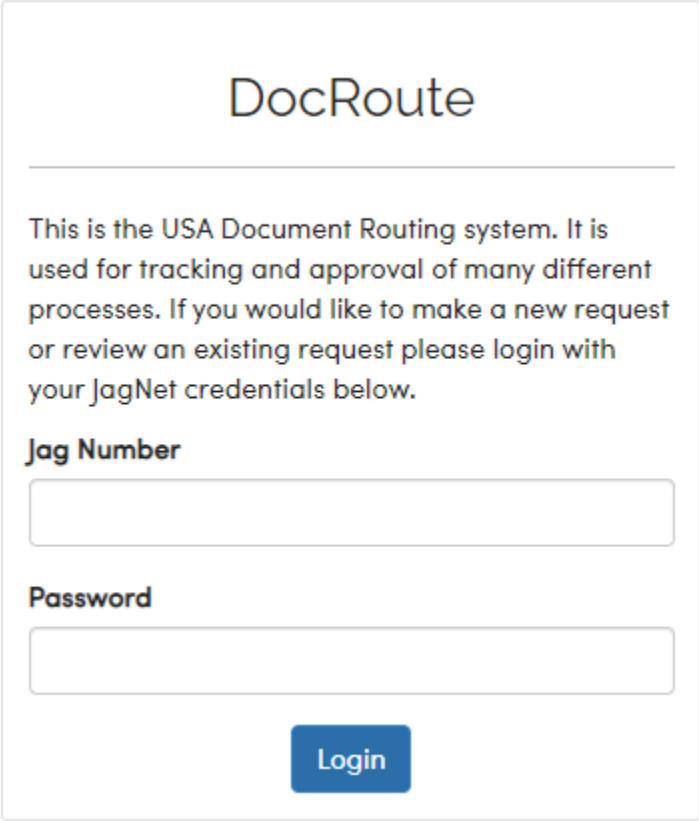


More Applications

This form is for authorizing faculty and staff employee access to Banner Student. Banner access for student workers is managed by the employing department. Please use the Banner job that corresponds with your department.

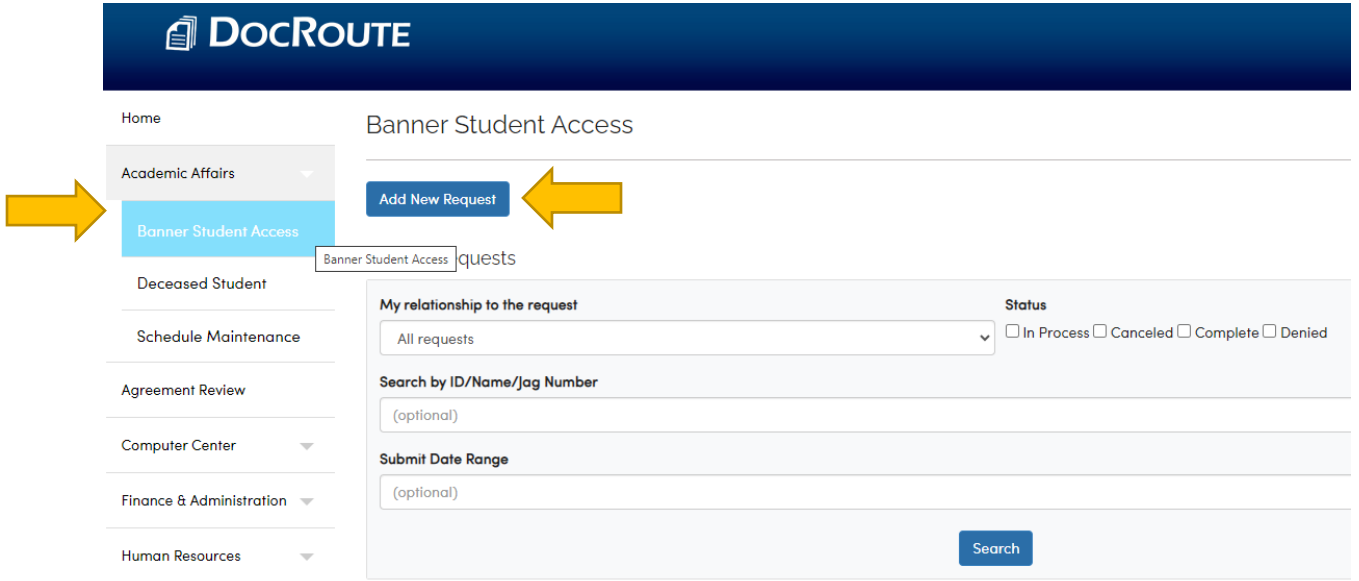
Admissions	ZGUP1003
Financial Aid	ZGUP1004
Payroll	ZGUP1008
Scholarship Services	ZGUP1006
Student Accounting	ZGUP1007

1. Sign into DocRoute with your single sign-on credentials (i.e., Jag Number and [JagNet](#) password).



The image shows the DocRoute login page. At the top is the 'DocRoute' logo. Below it is a paragraph explaining the system: 'This is the USA Document Routing system. It is used for tracking and approval of many different processes. If you would like to make a new request or review an existing request please login with your JagNet credentials below.' There are two input fields: 'Jag Number' and 'Password'. Below these fields is a blue 'Login' button.

2. The Banner Student Access form can be accessed by the direct link or from the Academic Affairs menu. *Please note: There is a Banner Security Access form in DocRoute under the Finance & Administration menu. This is for access to Banner Finance, not Banner Student.*



The image shows the Banner Student Access page. At the top is a dark blue header with the 'DocRoute' logo. Below the header is a navigation menu on the left with items: Home, Academic Affairs, Banner Student Access, Deceased Student, Schedule Maintenance, Agreement Review, Computer Center, Finance & Administration, and Human Resources. A yellow arrow points to the 'Banner Student Access' item. To the right of the menu is a 'Banner Student Access' section with an 'Add New Request' button. A yellow arrow points to this button. Below the button is a search area with a dropdown for 'My relationship to the request' (set to 'All requests'), a 'Status' section with checkboxes for 'In Process', 'Canceled', 'Complete', and 'Denied', a 'Search by ID/Name/Jag Number' field (optional), and a 'Submit Date Range' field (optional). A blue 'Search' button is at the bottom right of the search area.

- Click the Add New Request button. The Banner Student Access Entry screen will be timestamped and pre-populated with the initiator's name.
- To begin, enter the Jag Number or University email address (@southalabama.edu) for the employee in need of Banner Student access. Click the Search button.

Banner Student Access Entry

Created By Ashley Suggs		Create Date 9/25/2024 4:48:02 PM	
Employee			
Employee * J00123456			Search
Jag Number	Name	Title	
Department Code	Department Name	Email	
Banner Account Status		FERPA Training	
Unknown BannerAcctStatus			

- DocRoute will retrieve the employee's information from Banner.
- Enter the Jag Number or University email address for the employee's supervisor or department head. Click the Search button.

Employee		
Employee * Enter a Jag Number or email address		
Search		
Jag Number	Name	Title
J00098729	Ashley Suggs	University Registrar
Department Code	Department Name	Email
360100	Registrar's Office	asuggs@southalabama.edu
Banner Account Status		FERPA Training
Banner ID exists w/Banner security configured		Yes
Department Head or Approving Supervisor		
Supervisor * J00123456		
Search		
Jag Number	Full Name	Email

- DocRoute will retrieve the supervisor's information from Banner.

8. Complete the Details portion of the form as follows.

a. Requested Action:

- i. Change the security items on the account – Select this option to establish a new account or to edit an existing Banner user’s access.
 1. DocRoute will populate the employee’s Banner Account Status (i.e., “Jag number not associated with a Banner ID” or “Banner ID exists with Banner security configured”) once you enter the employee’s Jag Number/University email address and click the Search button.
 2. Employees whose Jag Number is not associated with a Banner ID will be required to complete the [FERPA course in Canvas](#) before their Banner account is created. Please email registrar@southalabama.edu for enrollment in the FERPA course.
 3. See Step #9 below for more details.

Banner Account Status	FERPA Training
Jag number not associated with a Banner ID	No
Banner ID exists w/Banner security configured	Yes

- ii. Remove all security items and lock the account – Select this option in the event of the employee’s termination, transfer, or as otherwise deemed appropriate by the respective supervisor.

b. Contact Phone – Use the ###-###-#### format when entering the phone number.

Details

Requested Action *	Security Access Type *	Contact Phone *
Selection is required.	Registrar	###-###-####

9. Please select the roles requested or provide a current Banner user whose access can be cloned.*

- a. User to Copy – Enter the Jag Number or University email address of the Banner user’s access to copy. *Please note: Banner Student access cannot be cloned from faculty/staff who are no longer employed by the University. Please also be mindful of listing an employee who has transferred to another department as their Banner access may have changed.*
- b. Roles Requested – Select the roles that pertain to the employee’s job responsibilities. A brief description of each role is provided in the table below.

Academic History	Forms associated with academic history (e.g., SHACATT, SHACTRL, SHAGCOM, SHADEGR, SHACRSE, etc.)
Admissions	Forms associated with admissions (e.g., SAAACKL, SAAADMS, SAAADCRV, etc.)
Advisors (query only)	Access to view forms associated with advising (e.g., SFAREGQ, SFARGRP, SFARHST, SFASRPO, SFASTCA, SGAADV, etc.)
Advisors (maintenance access)	Access to update forms associated with advising (e.g., SFAREGQ, SFARGRP, SFARHST, SFASRPO, SFASTCA, SGAADV, etc.)
Class Schedule (query only)	Access to view forms associated with the class schedule (e.g., SSADETL, SSAPREQ, SSASECQ, SSASECT, etc.)
Class Schedule (maintenance access)	Users must complete Schedule Builder Training before receiving maintenance access to the class schedule (https://www.southalabama.edu/departments/registrar/registration/schedule_training.html)
Course Catalog	Forms associated with the catalog (e.g., SCACRSE, SCADETL, SCAPREQ, SCARRES, SCASRES, SCATEXT, etc.)
Common	Common forms (e.g., SHATRNS, SMAPRLE, SOACTRL, SOACURR, SOASBGI, TSADETC, etc.)
Faculty Management	Access to view forms associated with faculty (e.g., SIAASGN, SIAASGQ, SIACFTE, SIACONA, SIAFAVL, etc.)
Student Reports	Access to student reports (e.g., student enrollment, suspension/dismissal report, address changes, student status, duplicate course enrollment)
General Registrar	Forms associated with registration and course setup (e.g., SCACRSE, SCADETL, SFAREGF, SFARGRP, SFASRPO, SFASTCA, etc.)
Student Demographic Information	General student data (e.g., SGASADD, SGASTDN, SPATELE, SOAIDEN, SOACOMP, etc.)

- c. Notes for Additional Access – Access to protected information beyond that requested via User to Copy or Roles Requested requires a rationale that explains why this access is required for the user to perform the functions of their job.
- d. Add SSN Search & Query – Access to search by Social Security Number requires an explanation of the employee’s legitimate educational interest in this information. Please specify if the employee needs access to the full SSN or the last four digits only.

* The DocRoute form currently only allows requests for information owned by the Registrar's Office. Requests for access to student information owned by Admissions, Financial Aid, and Student Accounting will continue to be approved by the respective data owner.

Details

Requested Action * Security Access Type * Contact Phone *

Change the security items on the account Registrar ###-###-####

User to Copy

Enter a Jag Number or email address Search

Jag Number	Name	Title
Department Code	Department Name	Employee Email

Roles Requested

☐ Academic History	☐ Admissions	☐ Advisors (query only)	☐ Advisors (maintenance access)
☐ Class Schedule (query only)	☐ Class Schedule (maintenance access)	☐ Course Catalog	☐ Common
☐ Faculty Management	☐ Student Reports	☐ General Registrar	☐ Student Demographic Information

Notes or Additional Access

Access to protected information beyond that requested via 'User to Copy' or 'Roles Requested' requires a rationale that includes why this access is required for you to perform your job responsibilities. Protected information includes, but is not limited to, students' biographical information, class schedule, and GPA.

Add SSN Search & Query: Yes No

10. The user requesting access must read and acknowledge the University's Information Systems Security Policy before submitting the Banner Student Access form.

By submitting or approving this request I understand that, I may be given access to one or more administrative computer systems. The information contained in these systems may be of a private and confidential nature and I acknowledge it is my responsibility to maintain the privacy of these records.

I have read the University's [Information Systems Security Policy](#) and understand all the requirements and guidelines stated therein. I understand that I am responsible for NOT sharing any passwords which I have been given and that I will be held accountable for any invalid use of my user identification. I further acknowledge that my failure to follow these security guidelines will subject me to disciplinary action up to and including dismissal and possible legal action.

Submit

11. Click Submit to initiate the workflow. The Department Head/Approving Supervisor identified in Step #6 will receive an email notification that a request is pending their review.

Banner Student Access Request 1007

Banner Student Access <noreply@southalabama.edu>
to me

4:12 PM (1 hour ago) ☆ ↶ ⋮

A Banner Student Access Request has been entered that needs your approval. Please go to the following <https://jagaspx2.southalabama.edu/docroute/BannerStudentEdit/1007> to review it.

12. Once the Department Head/Approving Supervisor approves the request, the request will be routed to the University Registrar.
13. After the University Registrar reviews and approves the request, the request will be routed to the Computer Services Center.
14. The workflow is complete once Computer Services assigns the user's Banner access and approves the request. The originator of the request will receive an email notification when the request is complete.

Banner Student Access Request Complete 1007



Banner Student Access <noreply@southalabama.edu>
to me ▾

4:24 PM (54 minutes ago) ☆ ↶ ⋮

A Banner Student Access Request that you submitted has been completed. Please go to the following <https://jagasp2.southalabama.edu/docroute/BannerStudentEdit/1007> to review it.

Please email registrar@southalabama.edu if you need assistance with the Banner Student Access DocRoute form.