Account Creation, Modification & Deletion Request

Banner, TopNet, InfoView, Document Imaging, Advance

Via TeamDynamix

When an area needs any action for the following applications they will be requested to complete a HelpDesk request ticket through the TeamDynamix service system: Banner, TopNet, InfoView, Document Imaging and Advance.

First go to: https://td.wku.edu/TDClient

Login using your NetID and Password – when logged in

Select from the landing pages Ribbon – Services

Service Catalog page loads – Select the Accounts box

Accounts page loads – Now scroll down your page and select the Enterprise Software > Create, Modify, or Delete Account link

Enterprise Software > Create, Modify, or Delete Account page loads – on the right side of page select the Green box titled Request Service

The Request for Account page opens – complete the request entering the data for the person, the account(s) that will be needed, information about why and how they will be using the account(s) and supervisor.

Submit your request.

Shortcut to Request page: enter this URL and you will be taken to a login screen – login with NetID & Password and it will open the Request for Services page – select the Green button Request Service – when page opens complete the request.

https://td.wku.edu/TDClient/Requests/ServiceDet?ID=161

How to complete the request:

Title: Title of ticket pre-loaded for you

Requestor: Required Field
May be the new Hire or the current employee requesting the services: if person not in database requestor use you information

Acct/Dept: Required Field
Should load automatically when Requestor information entered if in the database

Description:
Please enter a detailed description of the accounts needed for the person to perform their job duties or list why they need the account modified or deleted.

Account Rights Need to Be: Required field
Select action required from the drop down menu

Justification: Required Field
Once again why they need the account or a change in the account

Account Owner Name: Required Field
Must have the legal name of the account owner – First Name, Middle Name or Initial and Last Name

Position Type: Required Field
Must know if they are Staff, Faculty, Student or Non-Western Person

Employee Start/Termination Date: Required Field
Need to know for creating the account effective date or in-activation of account(s)

Supervisor Name: Required Field
We have to know who the responsible person is, if we have any questions about the hires access

Supervisor Email Address: Required Field
May be use to contact the responsible person if we have questions or concerns

Supervisor Phone Number: Required Field
May be use to contact the responsible person if we have questions or concerns

Verified Request with Supervisor: Required Field
We verify that the request of the account is actually needed for the person's job roles

Copy Account Settings from This Account:

If the person is replacing or doing the same job responsibilities as another it helps in creating all of the accesses needed for the account(s)

Banner Forms Access: (hold CTRL key to select multiples on PC – MAC users use Command key)
Select all of the Banner modules that the person will need access

TopNet Access: (hold CTRL key to select multiples on PC – MAC users use Command key)
Select all TopNet areas that the person will need access

TopNet Roles: (hold CTRL key to select multiples on PC – MAC users use Command key)
Select TopNet roles that the person will be using

InfoView Access: (hold CTRL key to select multiples on PC – MAC users use Command key)
Select InfoView accesses

Access Document Imaging: (hold CTRL key to select multiples on PC – MAC users use Command key)
Select the Document Imaging modules that the person will need to access and process

Once you have completed the form. Then select the **Request** button.

Add Attachments to the Request

The Request Created Successfully page will be displayed
If you have been asked to attach any paperwork select View the request you just created link
Then select the add Attachment button – Add Attachments form will appear – Browse for your document - select your document from your list – then select the open button – returned to the Add Attachments form – select the Upload button – success message should display – close the Add Attachment form – Attachment will now show that it has been added in the right panel in the attachment box.

If you are finished you may log out or enter another request if needed.