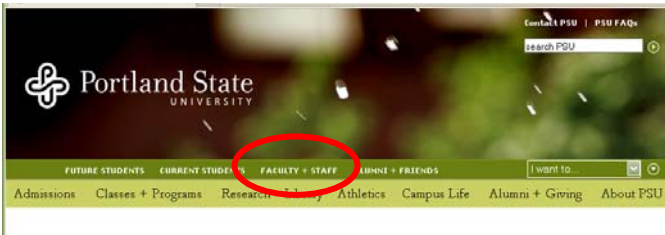


Assigning proxies for eBARs in Banner Workflow

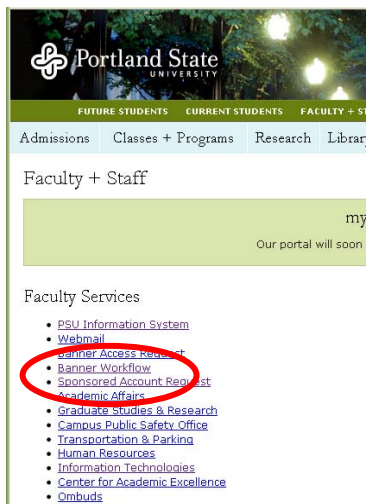
The following information will assist you with assigning proxies to perform your approval duties on electronic Banner Access Requests (eBAR)s within Banner Workflow. As requests are received electronically distributed, you and your proxy will receive notification. Only one of you needs to act on the request. Once it has been approved it will be removed from the pending worklist and no longer accessible.

All work done within Banner Workflow requires connection to the PSU network. This is done automatically when you are connected to the computer in your office on campus. If you are working externally you would need to have the PSU VPN (virtual private network) software activated before attempting to connect to Workflow. More information on VPN software is online at <http://oit.pdx.edu/anyconnect-windows> or <http://oit.pdx.edu/anyconnect-mac>

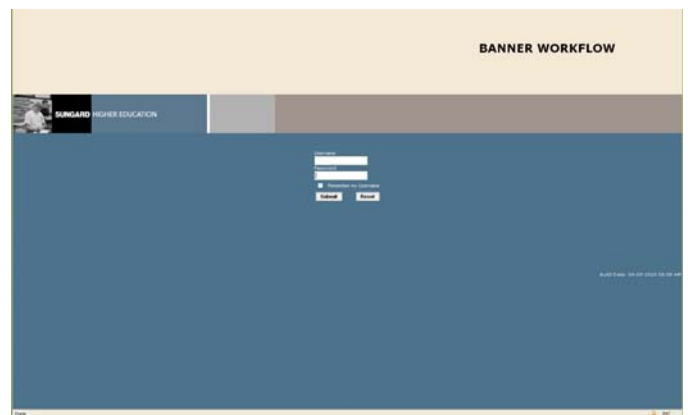
Step 1: Open web browser and go to www.pdx.edu; click the **Faculty + Staff** link in menu bar



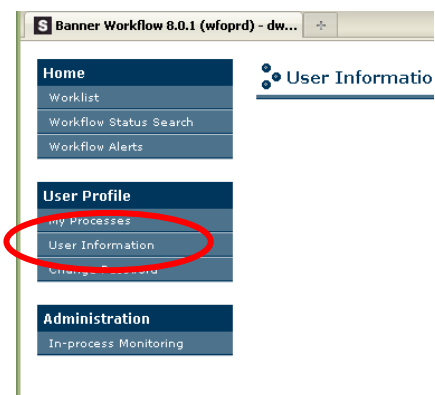
Step 2: In the Faculty Services section click the **Banner Workflow** link



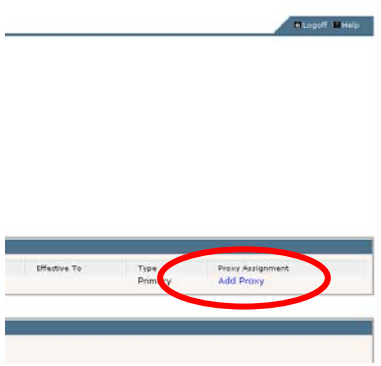
Step 3: Login to Banner workflow using your ODIN/network Username and Password



Step 4: Click the **User Information** link in the User Profile section on the left



Step 5: Click the **Add Proxy** link in the My Roles section



Questions????

Any questions about Banner Workflow proxy assignment can be directed to Rita Snodgrass in Business Affairs (ritas@pdx.edu or x5.5814).

Step 6: Click the drop down menu next to User and choose the **Banner user name** for the person to whom you are assigning proxy rights.

A screenshot of the Banner Workflow proxy assignment form. The form includes the following fields: Organization - RoleName: Root.PSU-Org - eBAR_FIS_Coordinator; User: a dropdown menu with 'ritas' selected; Effective From: a date field with '09-Jul-2010 12:25:22 PM' and a calendar icon; Effective To: a date field with '31-Dec-2099' and a calendar icon; Confidential: a checked checkbox; Non-Confidential: a checked checkbox; and Save and Reset buttons.

Generally the Banner user name is the same as the first portion of their e-mail address (ODIN ID). However there are a small number of Banner accounts which are different from ODIN. If you cannot locate the proxy's name, contact Rita Snodgrass in Business Affairs (ritas@pdx.edu or x5.5814) for assistance.

Enter the **Effective To:** date of **31-Dec-2099**.

Check the **Confidential** and **Non-Confidential** check boxes.

Click the **Save** button.

Step 7: Log out of Workflow by clicking the **Logoff** link in the upper right corner of the Banner Workflow interface.