

eBAR - Electronic Banner Access Request



Requesting Banner access - current process

- Paper forms used for Banner Student (SIS/AR/FA) and Finance/Human Resources (FIS/HRIS) access
- Require manual signatures and routing of forms through many offices
- Can take two weeks or longer to have account ready


 Portland State University
 Student Information System (SIS)
 Accounts Receivable Information System (AR)
 Financial Aid Information System (FA)

Banner Account Request Form

Requestor Name:	ODIN or Banner User ID:
Job Title:	Phone:
Department:	PSU ID#:
Employee type (circle one): Student GradAsst Faculty Staff	E-mail:

Please check the appropriate boxes to request access to the following information.

I. SIS Access Request	Yes	No	OIT/S Use
Faculty Web Access: online advising, scheduling and grade input			PIN:
General Registration Query: general student information and schedules			SIS_REGISTRATION_QUERY
General Student History Query: advising information in addition to general student information and schedules			SIS_HISTORY_QUERY

II. AR Access Request

General Cashiering Query			SIS_CASHIER_QUERY
General Cashiering Update/Modify			SIS_CASHIER

III. FA Access Request

General FA Student Work-Study Query			FA_STDT_EMP
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IV. Additional Access Request (SIS/AR/FA)

If the above access does not meet your needs, please describe the data and/or forms to which you would like access and how you intend to use the data:

Important Note Concerning Official Data:

- The data acquired from the Banner system is for *internal campus use only*.
- None of this data is to be released outside of your department without express permission from the Office of Admissions and Records.
- Official head count and credit hours are to be released only by the Office of Institutional Research & Planning.

I, the undersigned, have read and agree to abide by the PSU Computer and Network Acceptable Use Policy.

Requestor's Signature (required) _____ Date _____

Department Head/Director's Signature (required) _____ Date _____ Phone _____

SIS use:	AR use:	FAO use:
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Reset Form

Print Form

**Portland State University
 Banner Finance Information System (FIS)
 & Human Resource Information System (HRIS)
 Access Request – Please print clearly!**

(Revised 02-11-09)

REQUESTOR NAME: _____ BANNER ID: _____

 IS THIS A NEW EMPLOYEE? Y N

 IF NO, IS THIS A NEW POSITION FOR EMPLOYEE

 OR IS ADDITIONAL ACCESS NEEDED FOR CURRENT POSITION

DEPARTMENT: _____ MAIL CODE: _____ PSU ID: _____

 EMPLOYEE TYPE: Student Grad Asst Classified Unclassified Phone: _____

I. FIS Access Request	yes	no	(BAO Use)
A. General Query Screens	<input type="checkbox"/>	<input type="checkbox"/>	BAN_FIS_VIEW_GENERAL_C
B. Executive Query Screens	<input type="checkbox"/>	<input type="checkbox"/>	BAN_FIS_VIEW_EXECUTIVE_C
C. Purchase Order Creation	<input type="checkbox"/>	<input type="checkbox"/>	BAN_FIS_PURCHASING_DEPT_C
D. Invoice Creation	<input type="checkbox"/>	<input type="checkbox"/>	BAN_FIS_AP_DEPT_C
E. Journal Voucher Creation	<input type="checkbox"/>	<input type="checkbox"/>	BAN_FIS_JV_DEPT_C
F. Approver **	<input type="checkbox"/>	<input type="checkbox"/>	BAN_FIS_APPROVALS_C
** - complete the FIS Chart of Accounts Code Request Form ("signature change only") indicating which indexes/funds to approve on. Obtain form online from BAO Forms & Policies web site - http://www.pdx.edu/bao/files/media_assets/BAO_fchartofacct.pdf			
G. Other FIS Access:			_____

II. HRIS Access Request

	yes	no	(HRC Use)
A. General Query/Payroll Summary	<input type="checkbox"/>	<input type="checkbox"/>	BAN_HR_GENERAL_QUERY_C

B. Other HRIS Access: _____

Your Signature: I, the undersigned, have read and agree to abide by the PSU Computer and Network Use Policy.

X _____ Date _____ Phone _____

Authorized Signatures:

X _____ Date _____ Phone _____

X _____ Date _____ Phone _____

Dean or Vice President (REQUIRED)

Route Completed Forms to: _____

BAO (Dan Weiss for FIS)

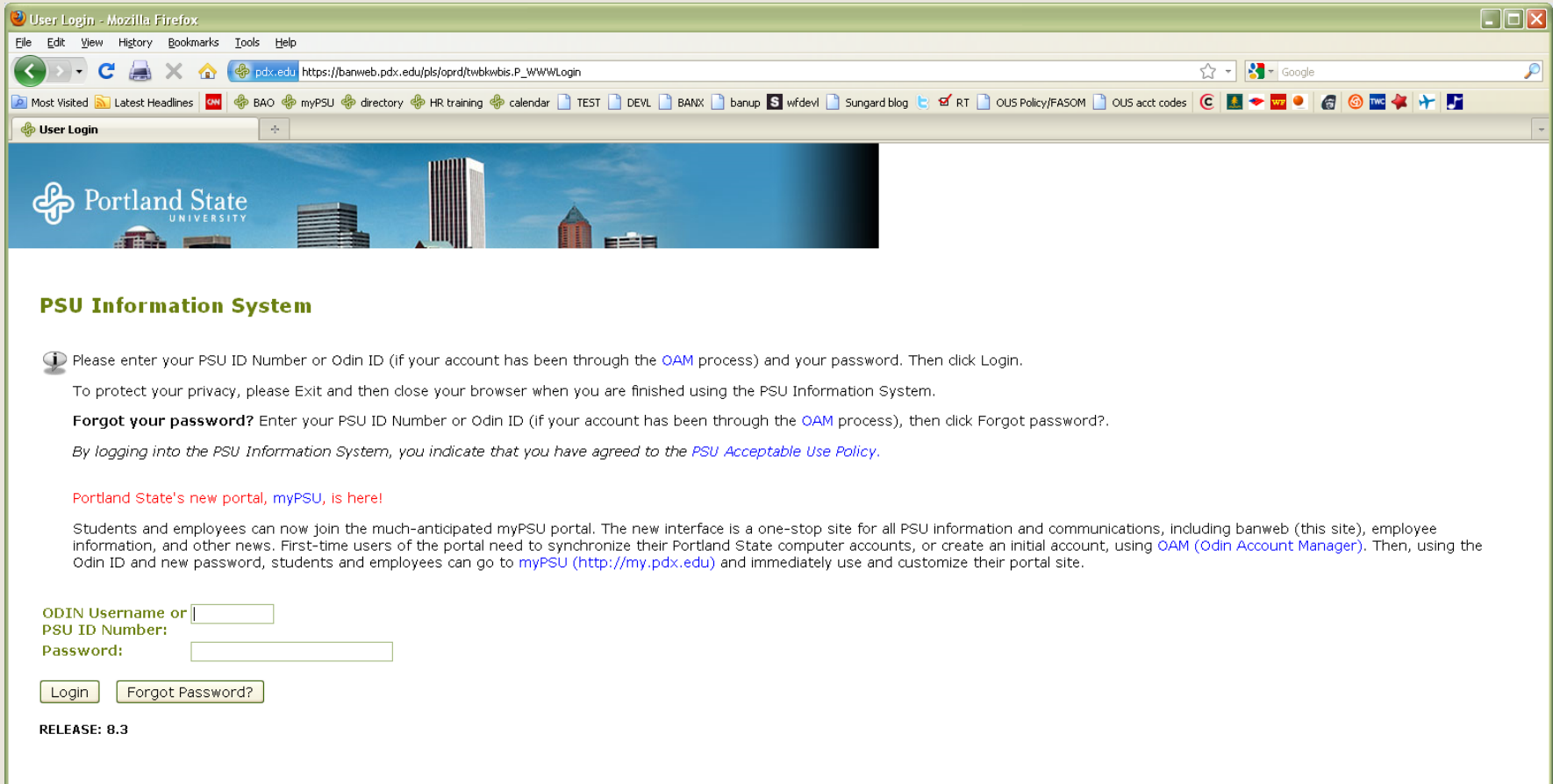
HRC (Jessica Selig for HRIS)

Bye Bye

eBAR process

- Electronic Banner access requests will replace the paper account request process across campus
- Will be used by new staff requesting access and existing staff needing additional access
- eBAR requests still require a PSU ID number (obtained when staff member is processed by HR), an ODIN account and a HR Job Record

eBAR process – uses banweb




User Login - Mozilla Firefox

File Edit View History Bookmarks Tools Help

https://banweb.pdx.edu/pls/oprdr/twbkwbis.P_WWWLogin

Most Visited Latest Headlines BAO myPSU directory HR training calendar TEST DEVL BANX banup wfdevl Sungard blog RT OUS Policy/FASOM OUS acct codes

User Login



PSU Information System

Please enter your PSU ID Number or Odin ID (if your account has been through the [OAM](#) process) and your password. Then click Login.

To protect your privacy, please Exit and then close your browser when you are finished using the PSU Information System.

Forgot your password? Enter your PSU ID Number or Odin ID (if your account has been through the [OAM](#) process), then click Forgot password?.

By logging into the PSU Information System, you indicate that you have agreed to the [PSU Acceptable Use Policy](#).

Portland State's new portal, [myPSU](#), is here!

Students and employees can now join the much-anticipated myPSU portal. The new interface is a one-stop site for all PSU information and communications, including banweb (this site), employee information, and other news. First-time users of the portal need to synchronize their Portland State computer accounts, or create an initial account, using [OAM \(Odin Account Manager\)](#). Then, using the Odin ID and new password, students and employees can go to [myPSU \(http://my.pdx.edu\)](#) and immediately use and customize their portal site.

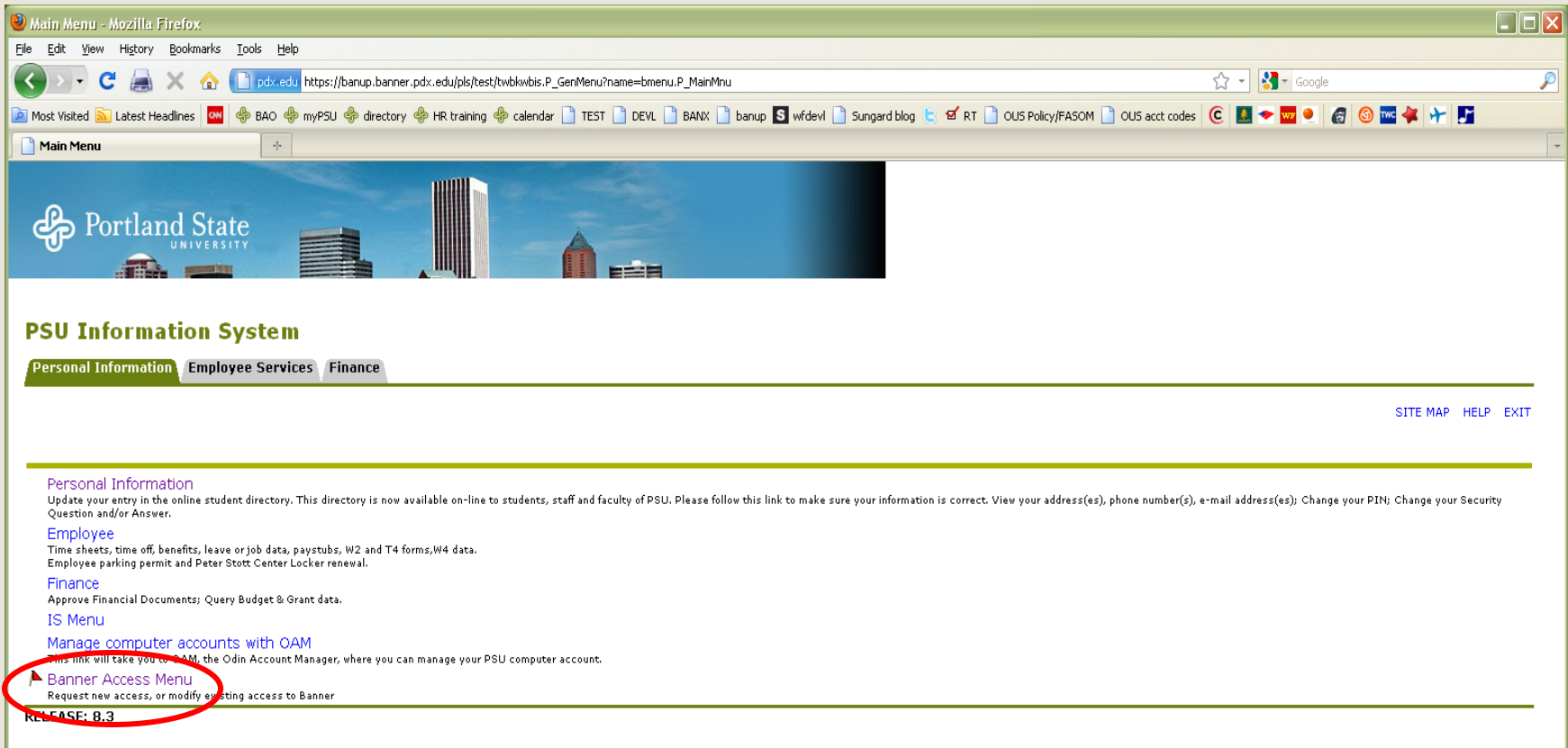
ODIN Username or

PSU ID Number:

Password:

RELEASE: 8.3

eBAR process – uses banweb




Main Menu - Mozilla Firefox

File Edit View History Bookmarks Tools Help

https://banup.banner.pdx.edu/pls/test/twbkwbis.P_GenMenu?name=bmenu.P_MainMnu

Most Visited Latest Headlines

Main Menu

 Portland State
UNIVERSITY

PSU Information System

Personal Information Employee Services Finance

[SITE MAP](#) [HELP](#) [EXIT](#)

Personal Information
Update your entry in the online student directory. This directory is now available on-line to students, staff and faculty of PSU. Please follow this link to make sure your information is correct. View your address(es), phone number(s), e-mail address(es); Change your PIN; Change your Security Question and/or Answer.

Employee
Time sheets, time off, benefits, leave or job data, paystubs, W2 and T4 forms, W4 data. Employee parking permit and Peter Stott Center Locker renewal.

Finance
Approve Financial Documents; Query Budget & Grant data.

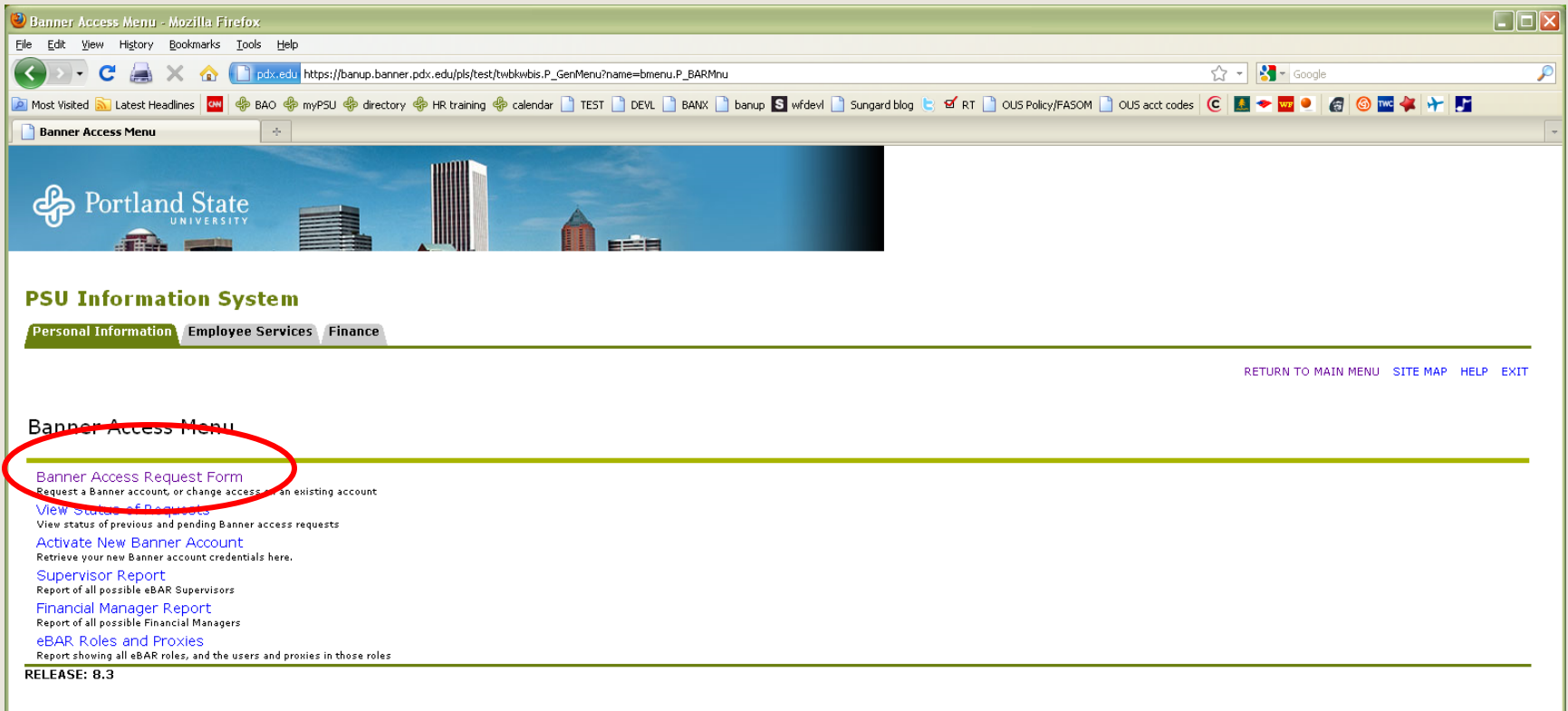
IS Menu

Manage computer accounts with OAM
This link will take you to OAM, the Odin Account Manager, where you can manage your PSU computer account.

Banner Access Menu
Request new access, or modify existing access to Banner

RELEASE: 8.3

eBAR process – uses banweb



Banner Access Menu - Mozilla Firefox

File Edit View History Bookmarks Tools Help

https://banup.banner.pdx.edu/pls/test/twbkwbis.P_GenMenu?name=bmenu.P_BARMnu

Portland State UNIVERSITY

PSU Information System

Personal Information Employee Services Finance

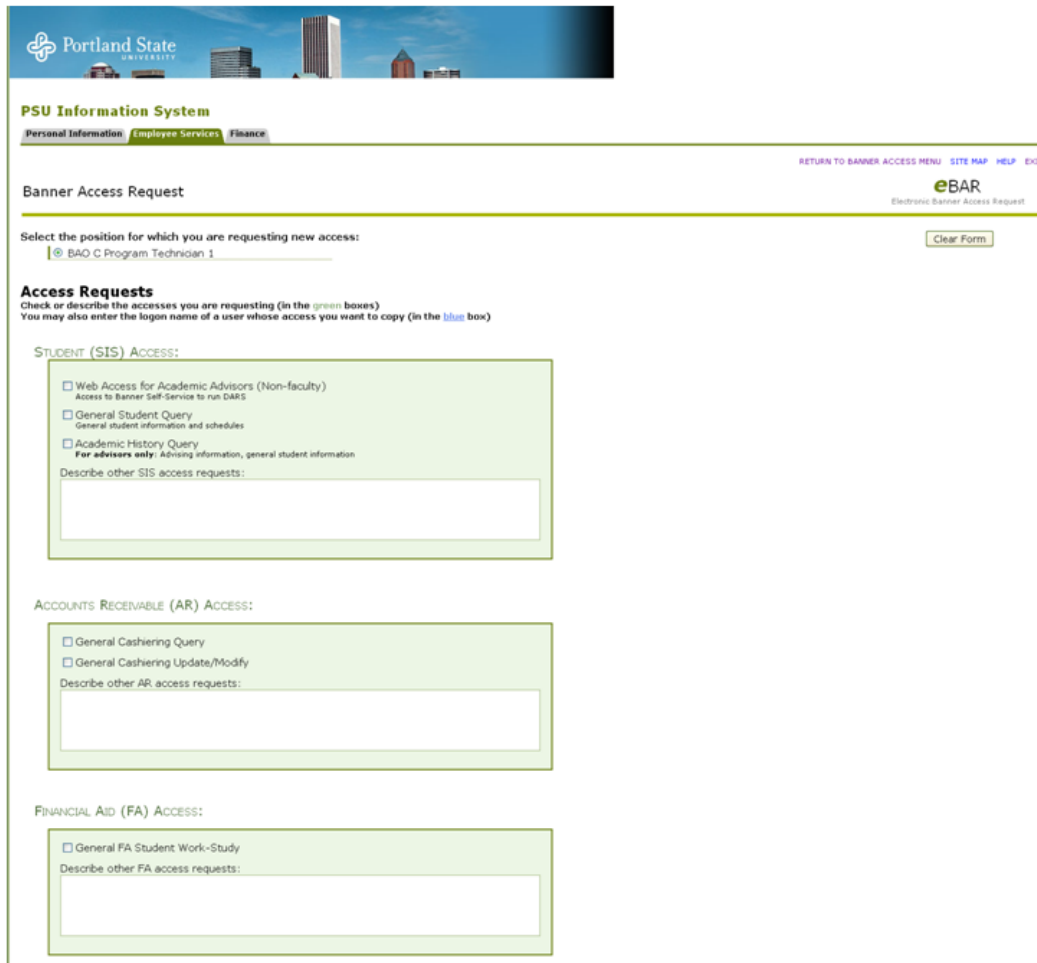
RETURN TO MAIN MENU SITE MAP HELP EXIT

Banner Access Menu

- [Banner Access Request Form](#)
Request a Banner account, or change access on an existing account
- [View Status of Requests](#)
View status of previous and pending Banner access requests
- [Activate New Banner Account](#)
Retrieve your new Banner account credentials here.
- [Supervisor Report](#)
Report of all possible eBAR Supervisors
- [Financial Manager Report](#)
Report of all possible Financial Managers
- [eBAR Roles and Proxies](#)
Report showing all eBAR roles, and the users and proxies in those roles

RELEASE: 8.3

eBAR process – user makes selections



Portland State UNIVERSITY

PSU Information System

Personal Information Employee Services Finance

RETURN TO BANNER ACCESS MENU SITE MAP HELP EXIT

Banner Access Request

eBAR
Electronic Banner Access Request

Select the position for which you are requesting new access:

BAO C Program Technician 1

Access Requests
Check or describe the accesses you are requesting (in the green boxes)
You may also enter the logon name of a user whose access you want to copy (in the blue box)

STUDENT (SIS) ACCESS:

Web Access for Academic Advisors (Non-faculty)
Access to Banner Self-Service to run DARS

General Student Query
General student information and schedules

Academic History Query
For advisors only: Advising information, general student information

Describe other SIS access requests:

ACCOUNTS RECEIVABLE (AR) ACCESS:

General Cashiering Query

General Cashiering Update/Modify

Describe other AR access requests:

FINANCIAL AID (FA) ACCESS:

General FA Student Work-Study

Describe other FA access requests:



eBAR process - approvals

- eBARs route for approval based on the organization code associated with the requestor's position and type of access requested:

SIS or FA access only - routes to Dean, Director/Chair, then Banner coordinator then to OIT

FIS/HRIS or AR access only or FIS/HRIS access along with SIS, and/or FA - routes to Financial Manager for the unit, then Dean, Director/Chair, then Banner coordinator then to OIT

eBAR process – approvals & proxy

- eBAR allows for Deans, Directors/Chairs to designate a proxy to receive these requests
- The proxy and Dean/Director/Chair will receive notification of new workflows to review and either person can act on them
- Once a workflow has been handled it cannot be re-reviewed unless it is rejected by either the requestor or by someone further along the workflow process stream

eBAR process – approvals & proxy

- Proxies need to be set up by OIT **BEFORE** assignment
- Wait until you hear back that the proxy is ready before proceeding with assignment

eBAR process – approving requests

BANNER WORKFLOW



SUNGARD HIGHER EDUCATION

Username:

Password:

Remember my Username

Build Date: 01-07-2010 09:54 AM

eBAR process – approving requests



The screenshot shows a web application interface for the eBAR process. On the left, there is a navigation menu with a 'Home' section containing 'Worklist', 'Workflow Status Search', and 'Workflow Alerts'. The 'Worklist' item is circled in red. Below 'Home' is a 'User Profile' section with 'My Processes', 'User Information', and 'Change Password'. The main content area is titled 'Worklist' and features a table with the following data:

Organization	Workflow	Activity	Priority	Created
! Root.PSU- Org	eBAR: Snodgrass, Rita (969796415) Performing	FIS Coord	Normal	04-Mar-2010 01:27:37 PM

Below the table, there is a pagination control showing '1 - 1 of 1' and navigation buttons for 'First', 'Previous', 'Next', and 'Last'. A 'Go to page:' dropdown is set to '1'. A 'Show Reserved Items' link is located to the right of the pagination. At the bottom right, there is a 'Top' link and a logo for 'SUNGARD HIGHER EDUCATION'.

eBAR process – approving requests

User Profile

- My Processes
- User Information
- Change Password

Administration

- Business Component Catalog
- Enterprise Management
- User Management
- Role Management
- Business Events
- Work Calendars
- In-process Monitoring
- Banner Workflow Modeler
- Workflow System Administration

Supervisor Approval Form Dean/Head/Chair/Director

Request submitted by: Michael Gostomski

Position Info:	Employee Info:
OIS Admin Sys Dev	988213600
OIS C Analyst Programmer 2	mjg@pdx.edu
Class: N/A	5-9153

Reason for needing this access:

"Testing..."

Requested Access:

- FIS: General Query Screens
- FIS: Invoice Creation
- FIS: Procurement Card (pCard) Module
- Copy permissions from: ANIMURA (Alison Nimura)**

Do you approve this request? - Select -

You must select your approval

- Select -
Yes, I approve
No, I do not approve

Existing Security

Groups:

No Groups To Display...

Classes:

Objects:

TGAUPRF (M), FAAINVD (M), FGRBDOSH (Q), FOAIDEN (M), FRRBILL (M), FWRFAIA (Q), FZRBASAG (Q), NTZPROX (M), NTZROUT (M), TRRAGES (M), ZFPRICNA (M), ZPHPJWNP (M), ZTRRAGES (M),