

Obtaining or Changing a Banner account

A Supervisor's Perspective

When a university employee (whether a staff, faculty or student worker) needs to obtain access to Internet Native Banner (INB) Banner, there are specific steps to obtain that access. For you, as supervisor, here are the steps you and your staff can expect in the process. These steps will apply to obtaining an account in any of the INB Banner systems (Student, Finance, Advancement, Human Resources and Financial Aid for example)

Step 1: Requesting a new or changing an existing production PROD account

The supervisor then requests a new production PROD Banner account or a change to an existing one by accessing the **Administrative Systems Suite Access Request** page on the USF IntraWeb:

<https://intraWeb.usfca.edu/its/dbaaccess/>

You will need to login with your USFconnect username and password to access the page.

The **Administrative Systems Suite Access Request Page** has the link for the form to the various systems as well as the mail-to links of the security officers for each system, as seen below: Click on the link for the **Banner Access Request Form**. The supervisor of the requestor needs to fill out the form to authorize the request.

The request form can be broken down into the following steps:

a) **User Information:** Fill in the employee information of the person needing access to Banner.

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Welcome to the USF Banner access request page.

Please take a moment and review the [Policy on Access to Banner Administrative Systems](#).

Please fill out the [Banner Access Request Form](#) to request the access. The access request should be submitted and approved by the supervisor of the user who needs the access. Please **make sure to provide correct and clear** information in the request form to avoid any delay in the access approval and processing. Depending on the modules specified, the request will be emailed to the appropriate functional security officer(s) for approval and processing.

If you have any questions regarding what information you need to fill out on the Banner access request form, please contact [Kathleen Kuo](#). If your question is related to specific function, please contact the functional Security Officer, listed below, for clarification. If you have any technical problems submitting the form, please email banrescc@usfca.edu. Thank you.

- Security Officers by Business Area:
 - Accounts Receivable: Connie Feltner, Teresa Zane
 - Advancement: Janice Lee
 - Finance: Ivy Efendioglu, Teresa Zane
 - Financial Aid: Regie DeGuzman
 - General: Kathleen Kuo, Steve Bair
 - Human Resources: Mike Holmes, Lori Bauwens
 - Student: Kevin Wilson, Edward Yoon

b) **Access/Change Request:** Here the supervisor selects the type of access in each of the services in Banner. Check on the box next to each choice to expand and fill out the form.

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USF Banner Access / Change Request Form

Please make sure to complete all **REQUIRED** fields shown in **RED**. The request submitter will received an email copy of the access request if the request is submitted successfully.

1 USER INFORMATION:
Please provide the information of the person who needs access. (* Required fields)

First Name:*

Last Name:*

8-digit USF ID#:*

USFconnect User ID:*

Department:*

Phone Number:*

Email:

Title:

Campus Location:

Off Campus:

Employee Type:

Full-Time Employee

Part-Time Employee

Student Employee

Temporary Employee

Special Affiliate

Other

2 ACCESS/CHANGE REQUEST:
Please select the type of access.

Self Service Banner (SSB):
Self Service Banner access defines what the user can see in USFconnect.

Internet Native Banner (INB):
All users are required to complete INB General Navigation Training through [Center for Instruction & Technology \(CIT\)](#). Upon submission of this access request form, users will be notified to complete and pass the quizzes as required by the Information Security Policy at USF. The INB access will only be granted upon completion of all the requirements.

Xtender:
The user must have INB access and have completed the INB and WebXtender General Navigation Training by [Center for Instruction & Technology \(CIT\)](#).

e) **Xtender**: Checking the box expands the choices for requesting Xtender access, including the choice to copy access from one user to another in the option **Copy access from username**. In the **Request Details** section check all modules that apply and enter the document type. If the access is being copied, just check the box for the module and do not enter the username in the module fields.

In the lower part of the Xtender section check the type of access needed and add any comments.

f) Finally, the supervisor essentially signs off on the request-remember that the request is tied to the person logging into the security intraweb site. Check the box to acknowledge supervisor status. Click **submit** to finish the request.

Xtender:
The user must have INB access and have completed the INB and WebXtender General Navigation Training by [Center for Instruction & Technology \(CIT\)](#).

Request Type

Assign access Copy access from username Remove access

Request Details

Module:
Please select the module and specify the type(s) of document needed (e.g. admission docs, grade rosters, invoices) or enter "same as [username]" if selecting **Copy access** above (e.g. same as lkuz2). Please **DO NOT** list the name of the person to be copied.

Student

Student Accounts

Financial Aid

Advancement

Finance

Access:
Please select the access to be provided.

View/Print Scan/Index Delete documents

Additional Comments:

3 Authorization

Supervisor's Name:

Submitted by: yoshioka

- I am authorized to request Banner Security Access for my division.
- I certify that this user needs the access specified in order to do his/her job.
- I understand that all users who have access to information under the stewardship of USF must comply with the USF Information Security Policy, FERPA, and all relevant state and federal regulations.
- I agree to notify the ITS Help Desk (itshelp@usfca.edu) if the information access requirements of this user changes.

I agree with the statements listed above and I acknowledge that I am the person in the Supervisor's Name field and that my username and IP address will be recorded for this request.

2010 University of San Francisco 2130 Fulton Street, San Francisco, CA 94117-1080 (415) 422-5555

Step 2: General Navigation Training

Each user must sign up and attend Banner General navigation training. **If the request is to make a change to an existing Banner account, the supervisor just needs to go through Step 1 to request that change.** This training is designed to provide skills and orientation to access and navigate the Banner interface. The skills and concepts learned are those common throughout all of the INB systems. Users may sign up for training at the CIT training site:

<http://myusf.usfca.edu/its/cit/training>

Here the user can check the calendar to see when sessions are offered:

After finding the session date, users will click on **Register for a Class** to sign up for the desired session.

The screenshot shows the 'Training Calendar' for September 2015. The calendar grid lists various training sessions with their dates and times. A red box highlights the 'REGISTER FOR A CLASS' button at the top right of the calendar area. The sessions listed include:

- 10:00 Canvas Essentials - CIT Training (Wed 2, Fri 4, Sat 5, Sun 12)
- 10:00 Ektron Advanced - CIT Training (Fri 4)
- 10:00 Canvas Course Org & Layout - CIT Training (Sat 5)
- 10:00 Word 2013 Mail Merge for PC - CIT Training (Wed 2)
- 10:00 Google Sites - CIT Training (Thu 3)
- 10:30 Google Forms - CIT Training (Fri 4)
- 10:00 Word 2011 Mail Merge for Mac - CIT Training (Thu 3)
- 1:00 Canvas Open Lab - CIT Training (Thu 3)
- 11:00 Canvas Gridbook & Quizzes - CIT Training (Sun 13)
- 10:00 Banner General Navigation - CIT Training (Tue 15, Wed 16)
- 1:00 Canvas Essentials - CIT Training (Thu 17)
- 10:30 InDesign Basics - CIT Training (Fri 18)
- 10:00 USF blogs - CIT Training (Fri 18)
- 11:00 Canvas Essentials - CIT Training (Sun 20)
- 10:00 Canvas Open Lab - CIT Training (Tue 22)
- 2:00 Ektron Basics - CIT Training (Sun 20)
- 3:00 iModules - CIT Training (Sun 20)
- 10:30 Photoshop Intro - CIT Training (Sun 26)

On the registration page:

<http://myusf.usfca.edu/its/cit/training-registration-form>

Users fill out their contact information, and then click on the **section title** to expand the section for **Office and Productivity**. Check the box for **Banner General Navigation** with the date for the session you would like to attend. After completing the signup form, click the **Submit** button at the bottom of the page. Sessions attendees will receive a notification a couple of days before the training as reminders of the time and the place of the training.

The screenshot shows the 'CIT Training Registration Form'. The form includes fields for Name, Email, Extension, Department, and Role. Below the form, there are several expandable sections: CANVAS LMS, TEACHING AND LEARNING, DESIGN AND MEDIA, and OFFICE AND PRODUCTIVITY. The OFFICE AND PRODUCTIVITY section is highlighted with a red box. The form also includes a 'FEEDBACK' button and a note about selecting classes to view.

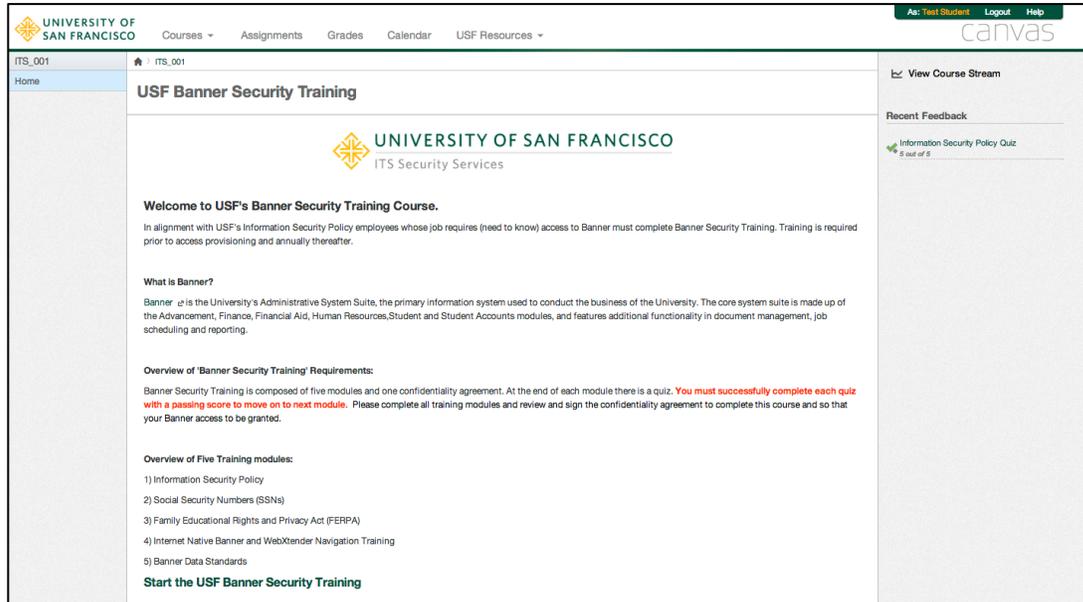
Click on any topic header below to view classes being offered. Please select a class(es) by clicking in the check-box to the left of the class title. If you are interested in any topic that is not being offered, please use the online video tutorials on lynda.com or email ct@usfca.edu to request for a one-on-one training.

- CANVAS LMS
- TEACHING AND LEARNING
- DESIGN AND MEDIA
- OFFICE AND PRODUCTIVITY

Below the sections, there are several class titles with checkboxes:

- AUDACITY RECORD AND EDIT AUDIO (MAC & PC) - BY APPOINTMENT
- BANNER GENERAL NAV. 8/7, 10:00-11:30 AM
- BANNER GENERAL NAV. 9/6, 10:00-11:30 AM
- DRAGON NATURALLY SPEAKING PC - BY APPOINTMENT

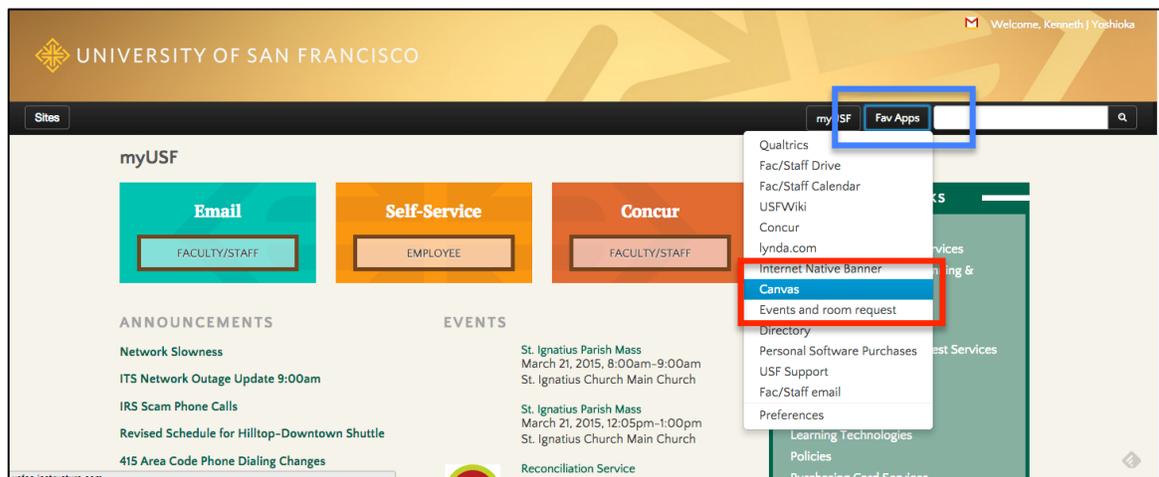
Step 3: USF Banner Security Training course: The submitted request is sent to the security officers for the requested system and the needed forms and permissions are determined and assigned. Before the account access is granted, each employee requesting access must go through the USF Banner Security Training course on Canvas. **Remember that your supervisor needs to request your Banner account in Step 2 before the USF Banner Security course can be made available to you. Once the supervisor has submitted the request, you will receive the email invitation to enter the course.**



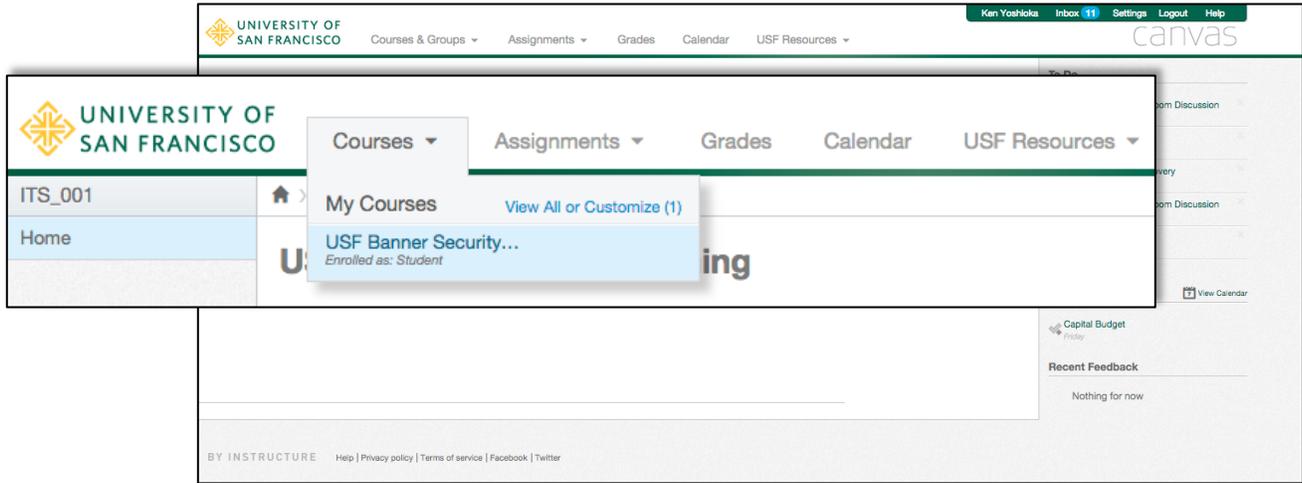
There are a series of tutorials and quizzes that need to be completed and passed before access is granted. Once the USF Banner Security course is completed and passed, then access is granted. The security officer for each system requested can then arrange for training in the particular function of the needed forms.

To access the Security Policy course:

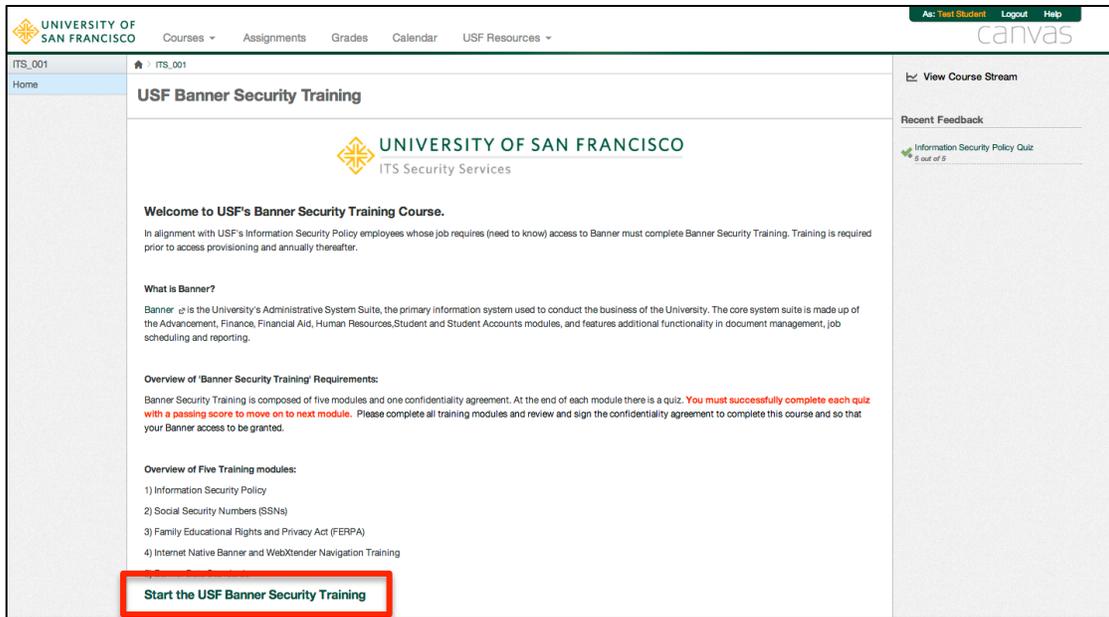
1. Once you have received the email invitation to the USF Banner Security course, login to USFconnect and click on the **Fav Apps** menu and then click on the link for **Canvas**.



- Once in Canvas, select the USF Banner Security course from the **Courses and Groups** menu.



- Once in the course, follow the prompts to move through the modules containing the tutorials and quizzes for the course. Once the course is completed, you will receive notification confirming your access to banner.



Questions?

For General Navigation issues or information on obtaining an account:

Ken Yoshioka

Center for Instruction and Technology

School of Education room 005

415-422-5670

yoshioka@usfca.edu

For questions regarding form function:

Contact the security officer for the particular system.