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.

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.
c) Self Service Banner (SSB): If the user needs access to the Self Service Banner tabs in USFconnect, select all options that apply. Note that access permissions can be copied from another user by entering that person’s USFconnect username in the Copy access from username field and in all fields that require a code or username.

![SSB Image]

d) Internet Native Banner (INB): Here the supervisor enters the scheduled or completed date of the user’s Banner General Navigation training. Next is the request type; as in the request for SSB you can copy access from another user by entering that person’s USFconnect username in the Copy access from username field and in all fields that require a code form name or username. Remove access is usually seen in specific situations, such as an employee leaving the department or university. Check the choices for the systems that the user needs to access and fill in the following fields for access.

Query Access and Update Access are entered with the form names or with the username of the form access being copied. Here the supervisor can list the forms that are needed. If the supervisor does not know what forms to request, a description of the work in Banner that the employee will be doing can be entered. The checkbox for SSN is checked if the job role requires access to view and edit Social Security number information.

![INB Image]
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.
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.

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

3. 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:
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For questions regarding form function:
Contact the security officer for the particular system.