



Office of the Bursar Banner Overview

Security

The Bursar Office assigns individuals both the authority and the responsibility of, within Banner, the ability to look at information to perform their position duties. Sharing of password information is not permitted.

Confidentiality

The records contained within Banner are confidential and will be kept confidential in accordance with the Family Educational Rights and Privacy Act (FERPA). In addition, certain information releases allowable by FERPA can be restricted on an individual basis by student preference. When trying to access records for a student who has information release restrictions, a screen will appear showing the types of information that the student does not wish to be released. Do not release this information to anyone.

Banner Conversion Notes:

CWIDS to ID:

- The 8-Digit CWID in PLUS legacy system converted to 9-digit "ID" in Banner.
- The ID is the same 8 numbers as in PLUS, with "A" at the beginning of the string.

Semester/Term Codes:

- The 3-digit Term/Semester code in PLUS legacy are converted to a 6-digit code in Banner:

Semester/Term	PLUS Legacy Code	Banner Code
Fall 2016	166	201660
Spring 2017	172	201720
Summer 2017	174	201740


Software Used to Access Banner:

- Banner doesn't require special software, other than a web browser and Java.
- Banner login is through an OPSU portal that will eventually have multiple features, enabling staff and students to accomplish a variety of tasks from one Aggie Access login.
- Your USERID will be your Aggie Access name (short name)
- Your Password will be your Aggie Access password.

Java is the middleware used to work in Banner. Once you login, you'll see the Java icon in your taskbar.



If you close the browser (or change the URL at the top of the page you used to access the portal, your Java application will immediately quit, thus logging you out of the system.

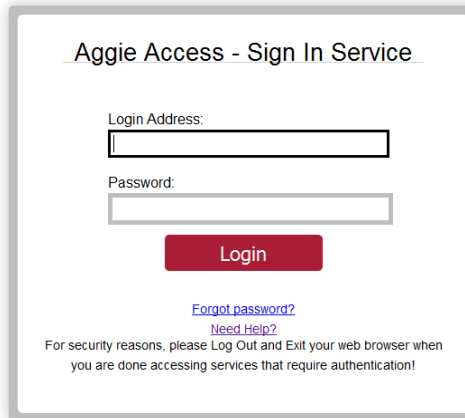
 You may want to consider using a different web browser ONLY for Banner access, to avoid unintended session ends. For example:

- If you use Internet Explorer as your regular browser, consider using Firefox as your Banner browser.
- If you use Firefox as your regular browser, consider using Internet Explorer as your Banner browser.
- If you use Chrome as your regular browser, consider using either Internet Explorer or Firefox as your Banner browser.

Once you decide on a browser to use specifically for Banner, you can set the homepage of that browser to <https://my.opsu.edu> so your browser automatically opens to the Banner login when you open the browser.

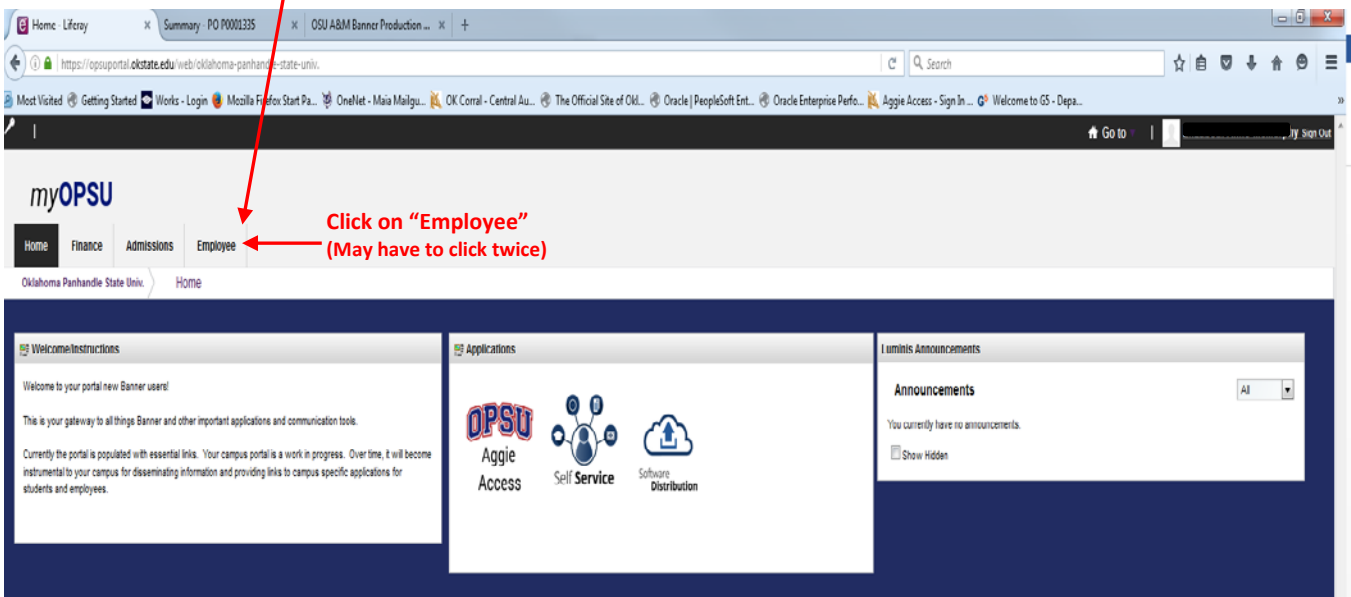
Logging Into the Banner System (INB):

- Open the internet browser you have chosen to use for Banner
 - Be sure you have the “popup blocker” option turned OFF
 - Click on the address bar
 - Type the following into address bar: <https://my.opsu.edu>
-
- Use your regular O-Key login address and password to login to the OSU Portal.



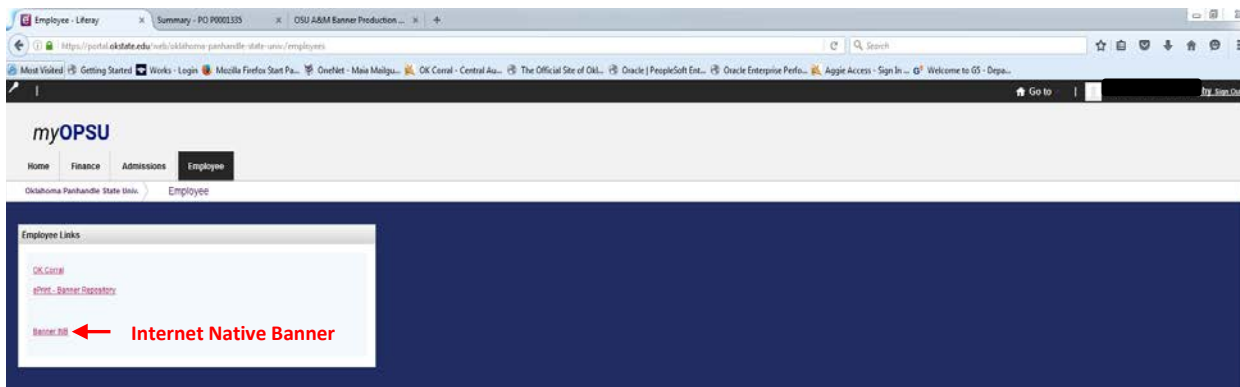
The screenshot shows a login page titled "Aggie Access - Sign In Service". It features two input fields: "Login Address:" and "Password:". Below the fields is a red "Login" button. There are two links: "Forgot password?" and "Need Help?". At the bottom, a security notice reads: "For security reasons, please Log Out and Exit your web browser when you are done accessing services that require authentication!"

- Once you are logged into the portal (*myOPSU*), you'll see:
 - Menu bar
 - Welcome/Instructions section
 - Luminis Announcements (Luminis is the name of the portal software)
- Click on the “Employee” link (you may have to do this twice) to get to the employee section of the portal If you already have Finance Access, you can click under INB under Applications.



The screenshot shows the myOPSU portal interface. The top navigation bar includes "Home", "Finance", "Admissions", and "Employee". A red arrow points to the "Employee" link with the text "Click on 'Employee' (May have to click twice)". Below the navigation bar, there are three main sections: "Welcome/Instructions", "Applications", and "Luminis Announcements". The "Applications" section contains icons for "Aggie Access", "Self Service", and "Software Distribution". The "Luminis Announcements" section shows "You currently have no announcements." and a "Show Hidden" link.

- The “Employee Links” section includes a link to Internet Native Banner (Banner INB)
- Click on the Banner INB link



- If you have Java installed on your computer and enabled in the browser you are using, you may see the spinning Java icon while you are being logged into Banner.

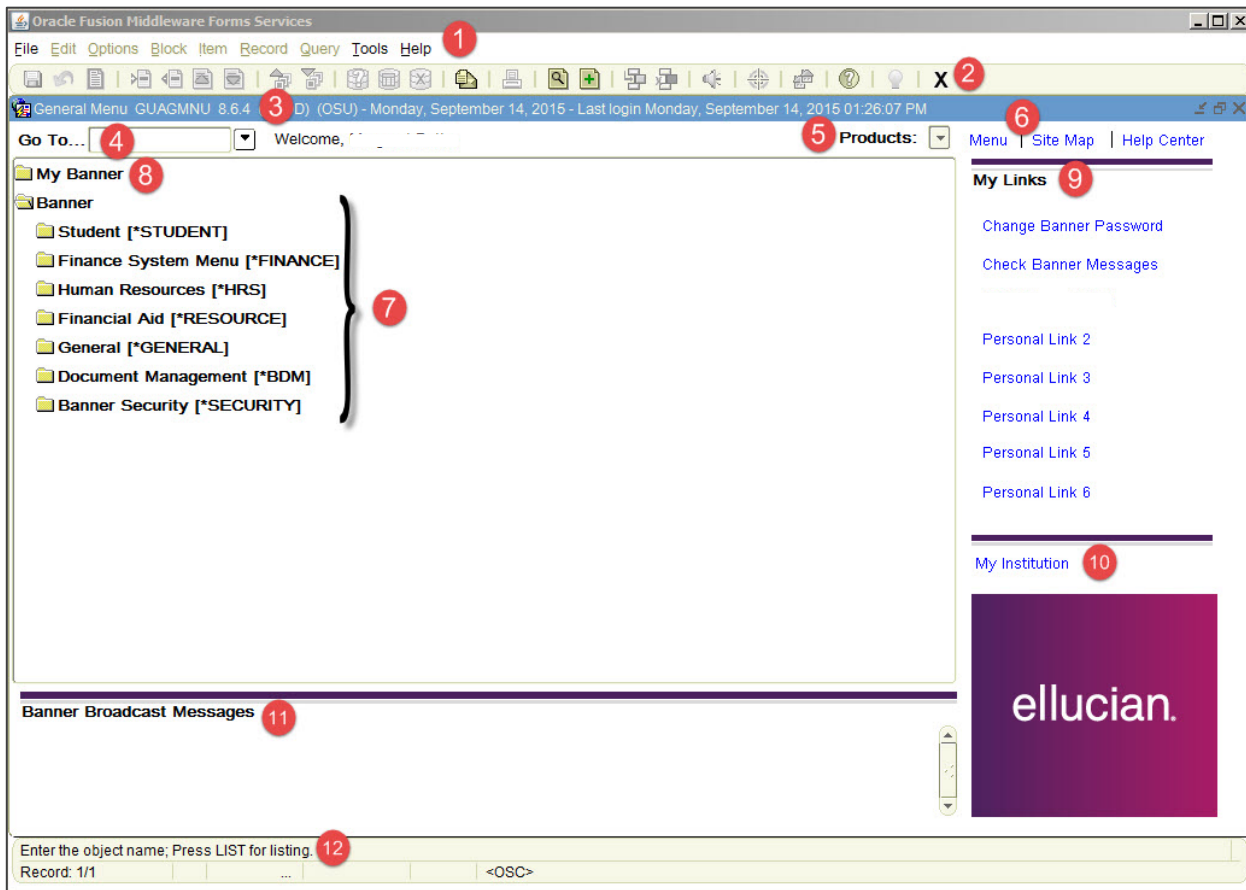


- If you don't have Java installed and enabled, you will see messages telling you that you need to install/update/enable Java. Follow those instructions and, if needed, start the login process over again.
- Once you are logged into Internet Native Banner (INB):
 - You will see a new window, with the Banner Main Menu
 - You will also see the Java icon in your taskbar



Main Menu:

- The **Banner Main Menu** provides staff with an overview of the menus, forms, jobs, and QuickFlows available in Banner.



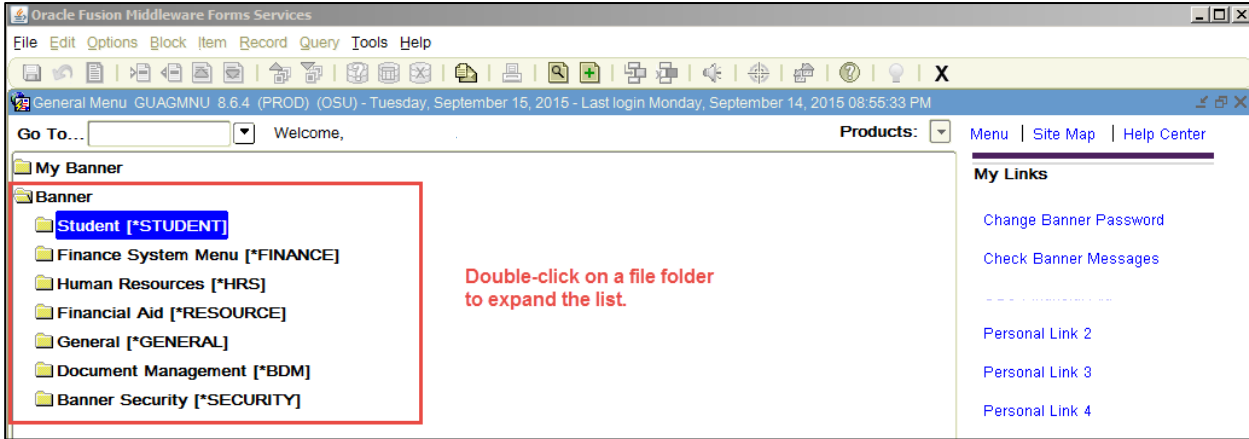
The Main Menu includes the following components that are used to navigate through Banner:

1. **Menu Bar:** Offers options for navigating within Banner through its drop-down menus.
2. **Tool Bar:** Provides a set of icons that represent shortcuts for performing common functions.
3. **Form Title Bar:** Displays the form name and its respective seven-character name.
4. **Direct Access (Go To):** Provides quick access to a form by its seven-character name.
5. **Products:** Provides access to the Banner modules through a simplified drop-down menu.
6. **Menu and Site Map:** Provides access to the Main Menu and module (overview) site map.
7. **Banner Menu/Folders:** Access to banner forms through a hierarchical tree structure.
8. **My Banner:** User customized/shortcuts to areas of the Banner hierarchical tree.
9. **My Links:** Displays pre-defined or user customized quick links.
10. **My Institution:** Will, at some point, display the link to OSU's website.
11. **Banner Broadcast Messages:** Displays notifications or messages to the user.
12. **Auto-Hint Status Line:** Describes the field where the cursor is located, and displays errors and processing messages.

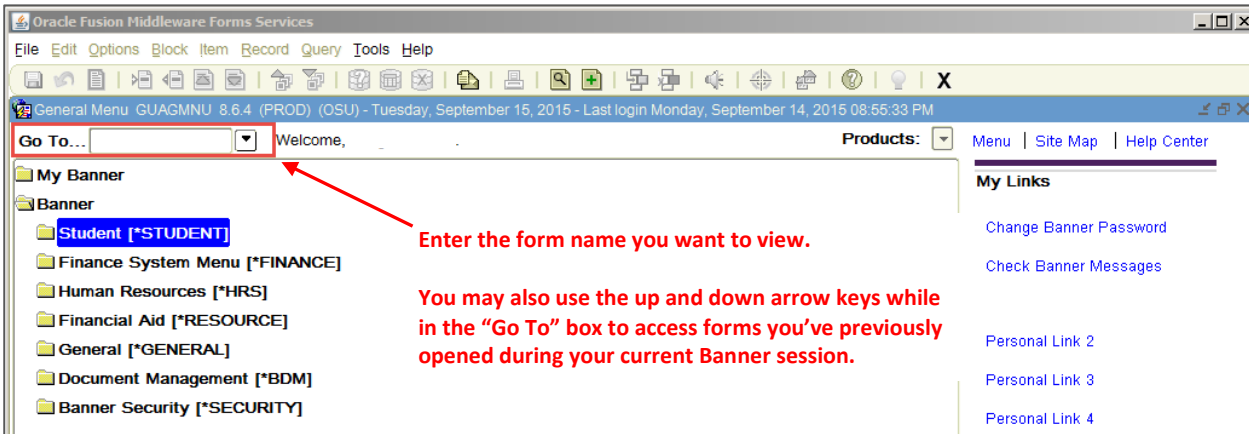
Banner Navigation:

- Banner allows a couple of different ways to find a form:

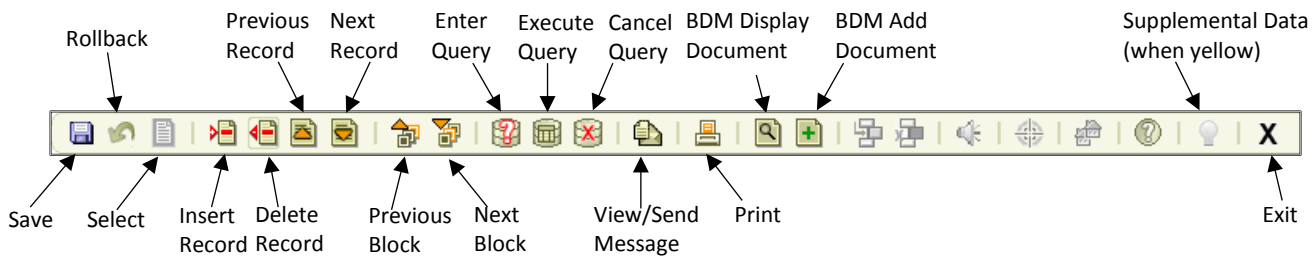
a. Main Menu: you can access the form by using the menu tree structure



b. Direct Access: you can access the form by typing the form name into the "Go To" box.



Toolbar Functions and Shortcuts:



Icon	Name	Purpose	Keyboard Shortcut
	Save/Commit	Save/Commit all changes	F10
	Rollback	Returns to previous form or to key block of current form	Shift + F7
	Select	Enters the selected values into the form	Shift + F3
	Insert Record	Inserts a new blank record	F6
	Remove (Delete) Record	Removes all information for the current record	Shift + F6
	Previous Record	Moves cursor to the previous record	Arrow Up or PgUp
	Next Record	Moves cursor to the next record	Arrow Down or PgDn
	Previous Block	Moves cursor to previous block	Ctrl + PgUp
	Next Block	Moves cursor to next block	Ctrl + PgDn
	Enter Query	Places the form into query mode	F7
	Execute Query	Searches the database	F8
	Cancel Query	Cancels the query	Ctrl + Q
	Print	Prints the current window	Shift + F8
	Supplemental Data	View supplemental data (SOASUPL/SPAIDEN)	
	Exit	From a Form: Exit form From Main Menu: Exit Banner In Query Mode: Exit query mode	Ctrl + Q

Function	Shortcut
Next Field	Tab
Previous Field	Shift + Tab
Clear Field	Ctrl + U
Duplicate Field	F3
Duplicate Record	F4
Clear Record	Shift + F4
Go To... Another Form	F5
Count Query Hits	Shift + F2
Show Keys	Ctrl + F1