



## 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

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## Software Used to Access Banner:

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



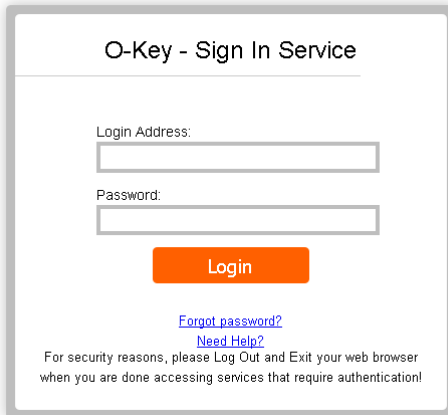
You may want to consider using a different web browser ONLY for Banner access, to avoid unintended session ends. For example:

- 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.okstate.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.okstate.edu>
- 
- Use your regular O-Key login address and password to login to the OSU Portal.



O-Key - Sign In Service

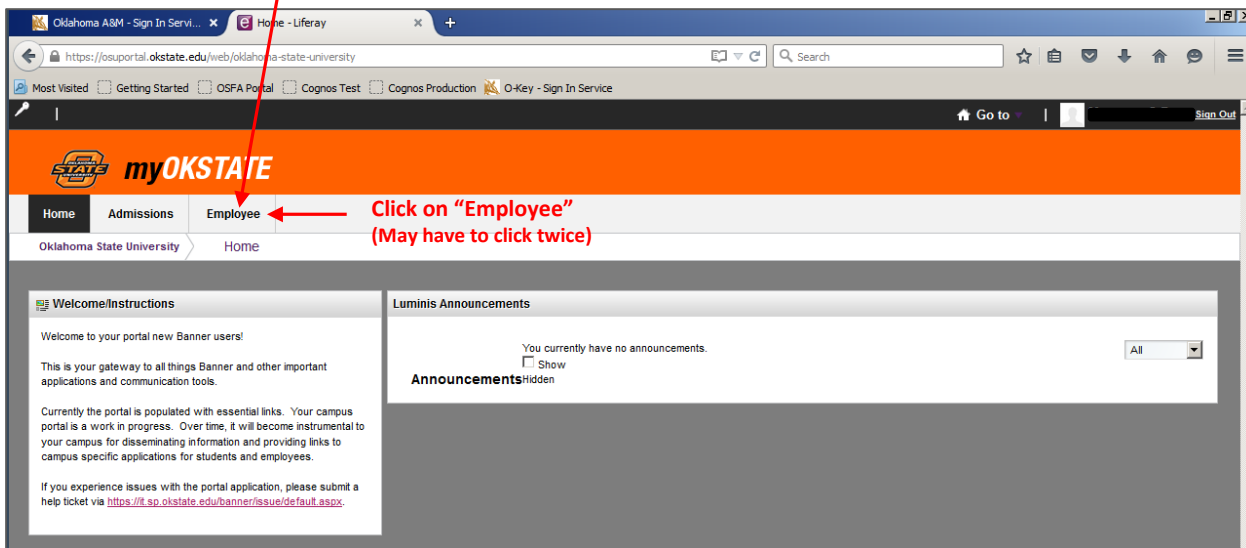
Login Address:

Password:

[Forgot password?](#)  
[Need Help?](#)

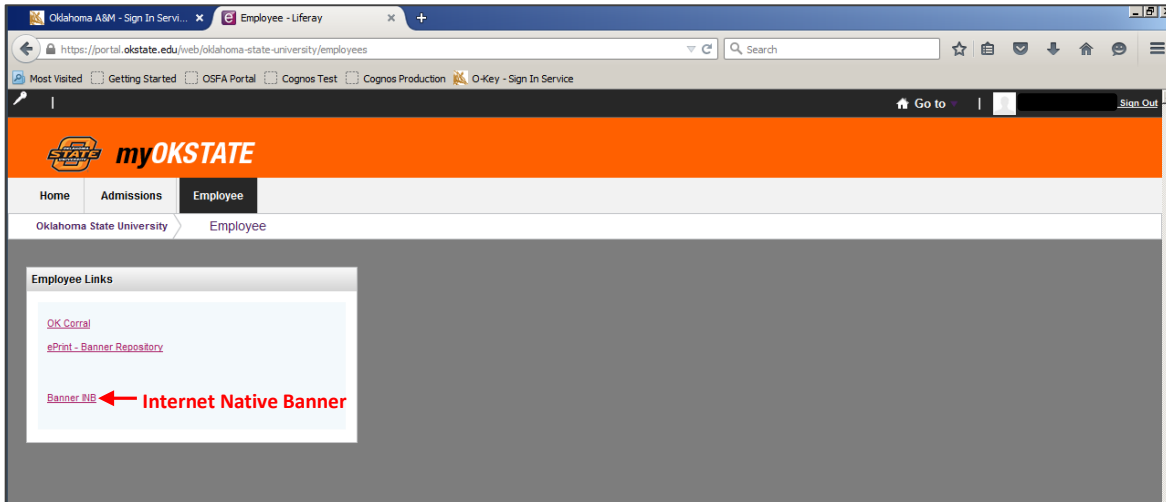
For security reasons, please Log Out and Exit your web browser when you are done accessing services that require authentication!

- Once you are logged into the portal (*myOKSTATE*), 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 a web browser window displaying the myOKSTATE portal. The browser's address bar shows the URL <https://osportal.okstate.edu/web/oklahoma-state-university>. The page features a navigation menu with the following items: Home, Admissions, and Employee. A red arrow points to the 'Employee' link, with a red text annotation that reads: "Click on 'Employee' (May have to click twice)". Below the menu, the page content is divided into two main sections: "Welcome/Instructions" and "Luminis Announcements". The "Welcome/Instructions" section contains text about the portal's purpose and provides a link for reporting issues. The "Luminis Announcements" section shows a message: "You currently have no announcements." with a "Show" checkbox and a dropdown menu set to "All".

- 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.

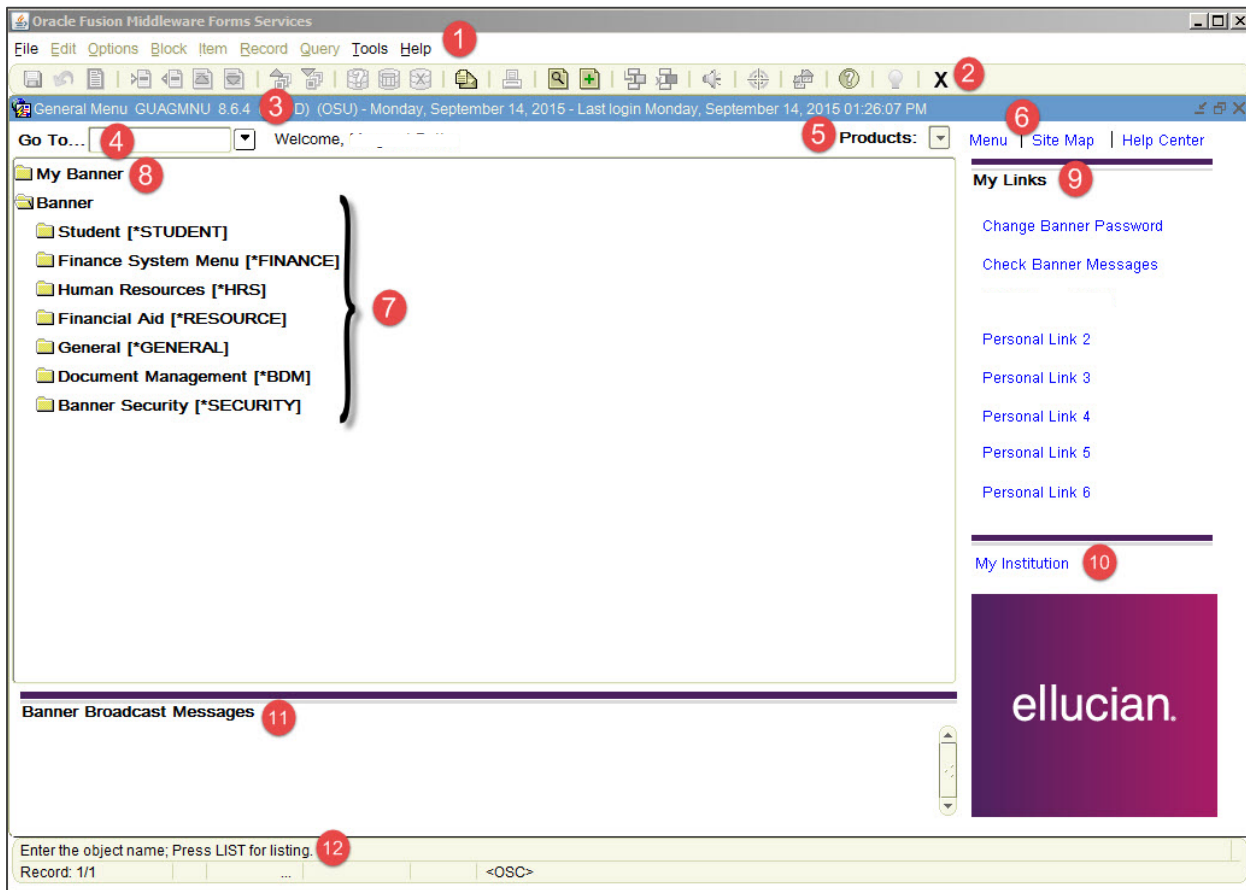


- If you don't have Java installed and enabled, you will see messages telling you that you need to install/update/enable Java. Follow those instructions and, if needed, start the login process over again.
- Once you are logged into Internet Native Banner (INB):
  - You will see a new window, with the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



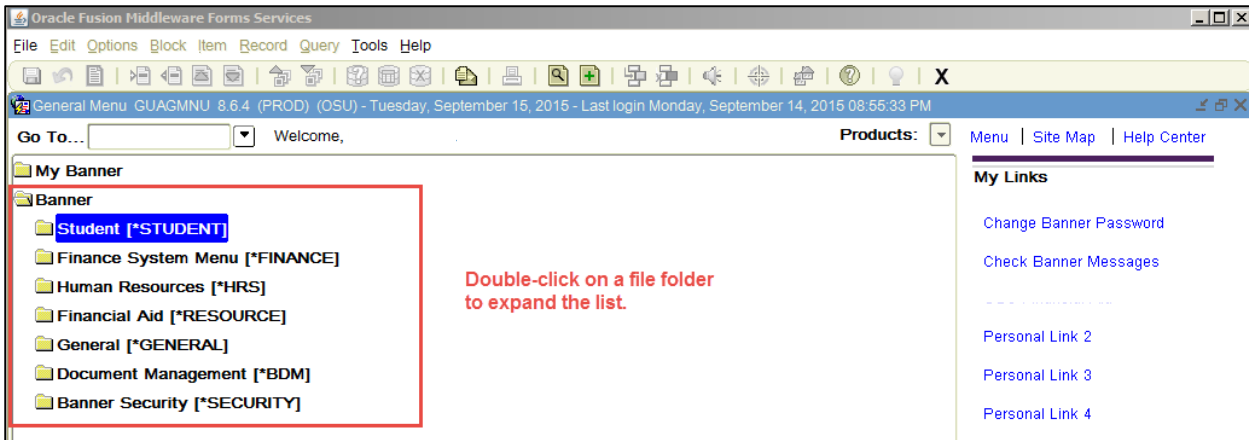
### The Main Menu includes the following components that are used to navigate through Banner:

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.

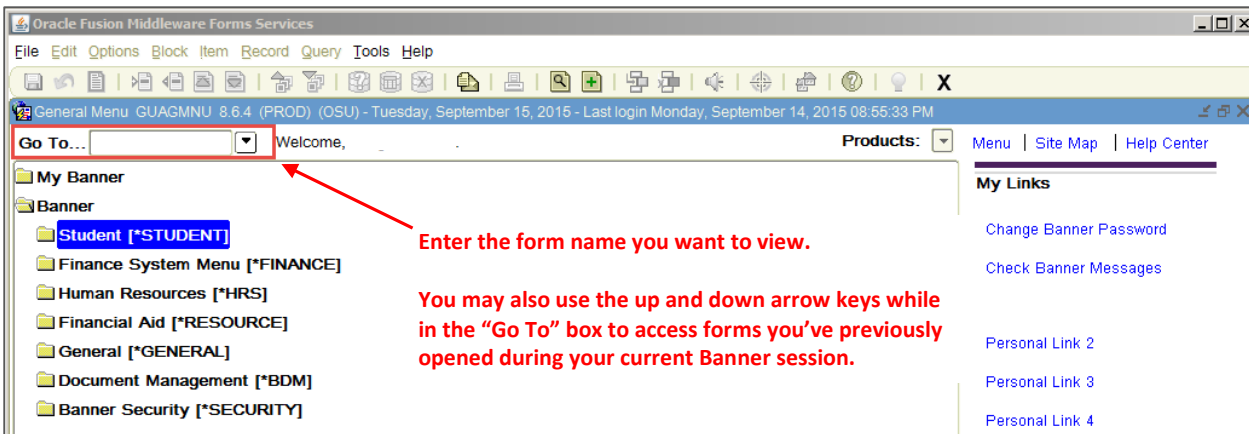
## Banner Navigation:

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

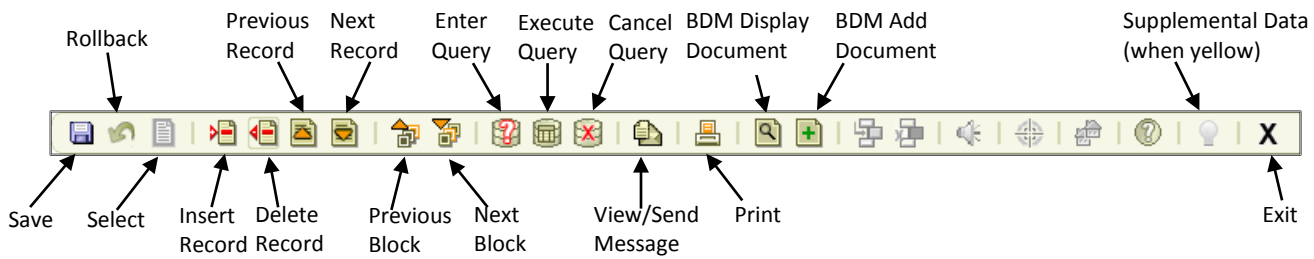
### a. Main Menu: you can access the form by using the menu tree structure



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