

Online Services/Account Request Instructions

Request Accounts for Yourself:

Note: This option is not available for all MIDAS users. Some users will need their supervisor to request accounts for them.

1. Log into <https://midas.odu.edu>
2. Select 'Account Request' under 'My Account' on the menu.
3. Select 'Yourself.' Update your budget code, if necessary. Click 'Next.'
4. Select your job function and any additional accounts that are needed. Click 'Next.'
5. Provide justification as to why accounts are needed and click 'Next.'
6. Review services in Account Request Summary. Make changes, if needed. Click 'Finish.'
7. Your request will be processed and submitted.

Requesting Accounts for Someone Else:

1. Log into <https://midas.odu.edu>.
2. Select 'Account Request.'
3. Select 'Someone Else' and search for user with their University ID number. Update budget code, if necessary and click 'Next.'
4. Enter in contact information for user that will need accounts. Click 'Next.'
5. Select user job function and any additional accounts that are needed.
6. Enter justification for why user needs accounts.
7. Review Account Request Summary and make any necessary changes. Click 'Finish.'
8. The Account Request will be processed and submitted.

Request the following services and accounts at midas.odu.edu:

- Electronic Services (Email and LAN/Active Directory)
- Banner Finance
- BDMS
- Database Accounts
- Web Time Entry
- Web Page Administration

Banner Accesses – complete list of all accesses available on Banner may be found on banner.odu.edu in the “Access Types” box:

Finance: <https://www.odu.edu/facultystaff/university-business/banner/finance>

Access Types

The different levels of Banner access are listed below. Please click on the appropriate link below to obtain more information regarding the access level you need.

- [Finance Banner Access](#)
- [Financial Aid Banner Access](#)
- [Student Banner Access](#)

Most frequently required Finance Accesses include:

- **BAN_FIN EVERYONE** – allows users to review most inquiry forms, including those associated with budget monitoring, chart code validation, and disbursement transaction research. **Be sure to list all budget codes you will need access to!**
- **BAN_CPS_RECEIVING** – allows users to create receiving reports for delivered goods, this access is given to general University personnel responsible for eReceiving tasks. **Don't forget to use Internet Explorer when eReceiving!**
- **BDM FINANCE** – be sure to request access to Banner Document Management (BDM) in order to view scanned vendor invoices and journal entries! You must also request “**B-F-DOCS Viewers**” when requesting BDM Finance access. After your request has been approved, you must also request the “Web Extender Plugin” be installed on your work station by your TSP. You may then view all hard-copy invoices/journal entries for your budgets. <https://odu.edu/content/dam/odu/offices/finance-office/docs/viewing-invoice-images.pdf>

Need Student Form Accesses?: <https://www.odu.edu/facultystaff/university-business/banner/student>

HOW TO VIEW IMAGES IN BANNER

Which forms allow you to view invoices AND Journal Entries directly once BDM is installed?

NOTE: Simply click the "Retrieve" button when highlighting/researching a Banner Invoice Number/Banner Journal Entry Number on these forms.

Retrieve Button in Banner:



1. FGIDOCR – *Cursor should be in the Document Number Field to view the image.*
2. FGIENCD – *Cursor should be on the invoice data field line to view the image*
3. FAIINVE – *Cursor may be anywhere on this form to view the image*
4. FAIVNDH/FTIIDEN – *Cursor must be on the vendor invoice number, Banner invoice number, or invoice amount fields to view the image*
5. FOIDoch – *Cursor should be on check or invoice number field to view the image – **DO NOT HIT GO!***
6. FAICHKH – *Cursor should be on the check number field to view the image. **AFTER clicking GO**, cursor may also be on the Banner or Vendor invoice number lines to view the image.*
7. FGIBDST/FGITRND – **these forms will not allow you to pull up an invoice/journal entry directly, but will show you the Banner Document Number so you may access the invoice/journal entry details on any of the above-mentioned forms!**

HOW TO EXPORT BANNER DATA INTO EXCEL: <https://odu.edu/content/dam/odu/offices/finance-office/docs/downloading-budget-info-from-banner-to-excel.pdf>

1. Users must first setup their user preferences in Banner to save temporary files in a SECURE location (*suggested: H:/backup*). Steps 1-4 on the handout referenced above walk users through how to do this, including screenshots.
2. Users may then select "Export" from the Tolls Drop-Down in ANY Banner Finance Form in order to export the details into Excel. Users may then decide to "Open" or "Save As" the data/document. Steps 5-6 in the handout referenced above explain these steps in detail.
 - a. Please note – the data exported from Banner will not be formatted as well, so users will need to setup some additional formatting after exporting the data.



RECONCILIATION TOOLS:

1. **Banner ePrint:** <https://www.odu.edu/facultystaff/university-business/information-management/data-control/eprint>
 - a. Contact the **Office of Finance Data Control Department** with questions at: 683.3257 or bannerhotline@odu.edu
 - b. Payroll Reports are available monthly, but must be requested via the *ePrint Payroll Report Request Form*: <https://www.odu.edu/content/dam/odu/offices/finance-office/data/payroll-eprint-request.pdf>
2. **Insight:** <https://www.odu.edu/facultystaff/university-business/banner/insight>
 - a. Contact **Tiffany Hampton** in the **University Budget Office** with questions at: 683.3127 opr tchampto@odu.edu
3. **Procurement Services Tools and Software Portals:** *Procurement Services offers a number of training opportunities and may be contact anytime with questions at 683.3105*
 - a. **Contracts List:** <https://www.odu.edu/facultystaff/university-business/purchasing/contracts>
 - i. Don't forget to check other **State Contracts** and **VASCUPP Contracts** ODU has available! *Details for each may be found on the Contract Link above.*
 - b. **eVA:** <https://www.odu.edu/facultystaff/university-business/purchasing/eva>
 - c. **PCard Details/BoA Login:** <https://www.odu.edu/facultystaff/university-business/purchasing/purchasing-card>

Tips & Tricks:

- Users should use **Google Chrome** when using Banner XE! Users may select "Print" from the Tools drop down in any Banner Finance Screen to print a screen image.
 - If you would like to see more columns when printing, we recommend you use SnipIt or SnagIt to collect screenshots and print these instead. You may also export all Finance Forms into Excel and print from there. For step-by-step instructions on how to do this, please review the Banner Finance Training Handout here: <https://odu.edu/content/dam/odu/offices/finance-office/docs/downloading-budget-info-from-banner-to-excel.pdf>
- Banner Finance Trainings are offered monthly, and review the **BAN_FIN_EVERYONE** forms in detail. Click here to view the current Banner Finance Training Schedule: <https://www.odu.edu/facultystaff/training-development/banner-training/courses-schedules>