Faculty access and role: SFU Bloomberg terminals
* Fall 2020 edition
There Are Two Types of Logins

Bloomberg for Education Portal (BMC Web Portal)
• Access the BMC elearning course on the web
  • https://portal.bloombergforeducation.com/

Bloomberg Terminal
• Access market data and analytics
  • https://bba.bloomberg.net/
We Redeployed the Education Website to Give Access to the Terminal

Bloomberg for Education Portal (BMC Web Portal)
• Access the BMC elearning course on the web
  • https://portal.bloombergforeducation.com/

Use Portal to access Terminal

Bloomberg Terminal
• Access market data and analytics
  • https://bba.bloomberg.net/
Steps to Terminal Access: Use Web Portal

Part 1: Students
Students create web portal login

Part 2: Faculty
Faculty approves student access request

Part 3: Students
Students make a Terminal login

Do this all at https://portal.bloombergforeducation.com
Creating a Login: Part 1
Student Creates Bloomberg for Education Account

The student follows these steps:

• Step 1: Creates Learner account at portal.bloombergforeducation.com

• Step 2: Signs up with school email address and clicks Sign Up

• Step 3: Clicks on email verification link

Student FAQ

Q: Do I need to take the BMC to get Terminal access?
A: No.

Q: How soon will I be able to access the Terminal?
A: When your instructor enables you, you’ll be able to create your Terminal account.
Creating a Login: Part 2

Instructor Authorizes Student to Create Terminal Account

The instructor follows these steps:

• **Step 4:** Create Professor account at portal.bloombergforeducation.com and await personal verification

• **Step 5:** Log into Professor account
  • Click on Terminals tab
  • Find students to enable
  • Toggle the Enable switch
  • Select a Customer (if your shared Terminals are grouped in different places)

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**Faculty FAQ**

Q: How will I know students are waiting for access?
A: Faculty could add a mechanism (shared inbox, Google form) for this in their individual school’s code of conduct for lab use. As every school is different, there isn’t a single method that works for everyone.

Q: How do I enable faculty?
A: *Faculty can enable themselves* after creating a professor web portal account.

Q: Can I search for, filter, or sort students on the Terminals tab?
A: Yes

Q: How do I disable or remove students?
A: To prevent students from getting access, simply don’t enable them. To disable students who already have access, email your account manager.
Manage Terminal Access

This page aggregates all the students and faculty associated with your academic institution in the Bloomberg for Education Users table. Use this page to authorize students and faculty to create a shared Bloomberg Terminal login. Each user must be assigned to a unique Bloomberg Customer before they can create a Bloomberg Terminal login. Toggle the status of users below to assign them a unique customer number.

If a user’s status is enabled, the user will be able to create a Bloomberg Terminal login with their Bloomberg for Education account. If a user’s status is disabled, the user will not be able to create a Bloomberg Terminal login with their Bloomberg for Education account. If a user’s status has an icon, the user has already created a Bloomberg Terminal login with their Bloomberg for Education account. Use the Filters button to narrow your search for specific users.

Students must create an account on the portal with their school email address in order to be connected to your institution’s Terminals.
Creating a Login: Part 3

**Student Creates Bloomberg Terminal Login**

The student follows these steps:

- **Step 6:** Opens Terminal Access tab in portal.bloombergforeducation.com and inputs information
- **Step 7:** Access the Terminal with provided credentials
  - Go to bba.bloomberg.net
  - Enter Bloomberg Terminal username & password
  - Verify your identity with code sent to email/phone
  - Click the down arrow beside “Launch” button and select “Launch within the browser”

**Student FAQ**

Q: A paywall appeared when I logged into the BMC web portal. What do I do?
A: Ignore it and click on the Terminal Access tab.

Q: Will I be notified when the professor has enabled me for access?
A: Not by Bloomberg – your faculty contact will let you know.

Q: What do I do when I get Citrix warning messages?
A: You should not need to download Citrix to access the Terminal via a web browser; however, you can choose to install a Citrix client if desired: Instructions

Q: I tried to log in but saw a message saying the Terminal is not available. What do I do?
A: All Terminals are in use. Come back later and try again.