



# **Banner 6**

# **Navigation Training**



## **What is Banner?**

BANNER is an administrative software application developed specifically for higher education institutions by Systems and Computer Technology Corporation (SCT).

BANNER is a system, which in turn is made up of modules, each of which handles a major function. For example, the Finance system modules include General Ledger, Stores Inventory, Purchasing, Accounts Payable, Budgeting, Accounts Receivable, Fixed Assets, and Grants. The Human resource modules cover functions such as Payroll, Benefits, Applicant Tracking, Position Control, and COBRA. Modules for the Alumni system include Campaigns, and Gift and Pledge Processing. Some of the Student system includes, Admissions, Scheduling, Registration, and Academic History.

New Mexico Highlands University (NMHU) purchased and maintains five modules which are:

- FINANCE
- ALUMNI DEVELOPMENT
- STUDENT
- FINANCIAL AID
- HUMAN RESOURCES
- GENERAL

The systems are highly integrated because they all share a common database. This common database is shared by everyone who uses BANNER at NMHU, which makes it easy to maintain records. Because of the common database, multiple departments use the information entered into BANNER. Other departments share data, sometimes several years in the future. (See NMHU's Data Entry Standards) For example, a name change would be reflected in the Student, Financial Aid, Human Resource, and Alumni systems.

Though information on BANNER is shared, many users are allowed only to look up (query) specific information. When you perform a query, you retrieve information from the database and display that information on the screen. BANNER has a variety of tools that let you search for a record and automatically retrieve associated information.

Technically, data is not actually stored in BANNER. Data is stored in a powerful database called ORACLE. It would be difficult for a non-technical user to directly add or retrieve data from the actual database. The BANNER software acts as an interface to the ORACLE database, making the job of adding or retrieving data much easier. BANNER provides the features and processing

capabilities needed for student information (admissions, registration, etc.), alumni information (sponsor identification, campaign management, etc.), personnel information (employee benefits, salary/deduction history, etc.), financial aid information (needs analysis, packaging, etc.) and finance information (general ledger, accounts payable, accounts receivable, etc.).

BANNER also has sophisticated security measures to make sure that only authorized individuals have access to specific data.

## **New Mexico Highlands University**

### **NOTICE TO BANNER SYSTEM USERS**

#### **All Information in the New Mexico Highlands University BANNER Database System is Confidential**

#### **Banner Confidentiality Statement**

As a New Mexico Highlands University employee who will use the BANNER System, you will be able to access confidential information on employees, students, alumni, donors, and vendors. Much of the information in the BANNER System is protected from disclosure by law. This information is to be used solely in the performance of your job and not for any other reason.

You are not to disclose to anyone your password to the BANNER System. An employee who discloses his or her password, who uses the BANNER System for the purposes other than for the performance of his or her duties, or who provides information from the BANNER System to any individual or organization for reasons unrelated to the performance of his or her job will be subject to disciplinary action.

#### **System Security Rules**

1. Passwords are confidential. Employees are to use only the username issued to them. The use of another employee's username or allowing another individual to use their username is strictly prohibited.
2. PCs are to be logged off or locked at the end of each business day. It is recommended that during periods when the employee will be away from their PC for more than fifteen minutes.
3. Banner should always be logged out at the end of each business day. An "open" student, employee or vendor record should never be left unattended on a PC.
4. An employee must have a "legitimate education interest" in order to access a student record. The Family Education Rights and Privacy Act (FERPA) of 1974 set this standard.
5. Any employee who is not completely familiar with the FERPA, its purpose and the rules governing access to student records, please contact the Registrar so that you are provided with a written copy.
6. An employee who "signs in" for another person using their own username and password will be held accountable for any errors made by that other person.

## Logging In and Logging Out

### How to Log In



Your window desktop will contain the Banner2000 icon:

To open Banner, double left click on the Banner2000 icon to access the Login dialog box:


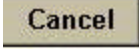
The image shows the "Banner2000 Logon (Build 14)" dialog box. It has a blue title bar. The main area is divided into sections. The top section displays "New Mexico" and "HIGHLANDS University" with a logo. To the right of this are input fields for "Username:", "Password:", and "Database:" (with a dropdown menu showing "PROD"). Below these are "Connect" and "Cancel" buttons. The bottom section is titled "Message of the day:" and contains a list of system update messages with timestamps and descriptions, such as "(29-Sep-2003 03:26PM) Financial Aid 5.9.4 has been applied." and "(05-Aug-2003 03:44PM) Human Resources 5.5 has been applied." There are scroll bars on the right side of the message list.

**Username:** Type in your Banner username. Tab to the Password field.

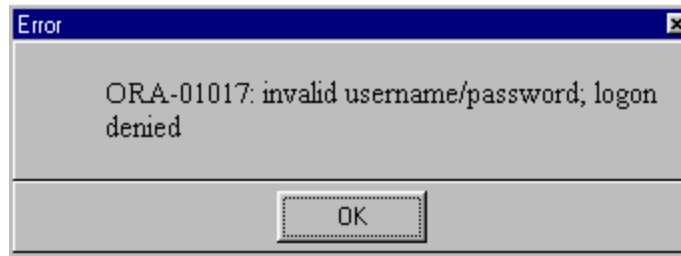
**Password:** Type in your Banner password. Tab to the Database field.

**Database:** Pick the database you wish to work in by either taking the default (PROD) or by selecting the arrow to the right and view what databases are available (PROD for production, PPRD for pre production or TRNG for training).

**Note:** Your Username is your network ID.

Click  to log in to the Banner system. Click  to abort the login process.

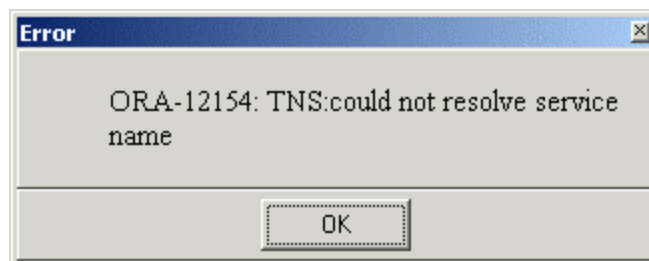
If you see the following dialog box, it can mean one of three things.



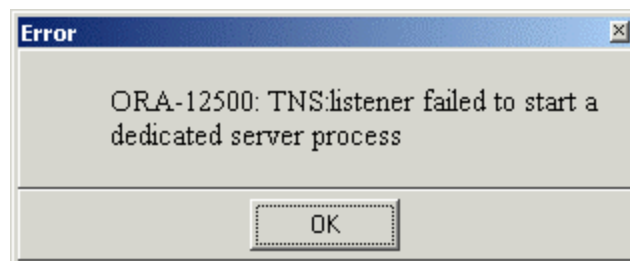
- You did not type in your username or password correctly.
- You are trying to connect to a database that you are not set up for.
- You do not have a banner account.

Training (TRNG) database is an area that user are first given access to. The data in training was generated by SCT/Banner and is used by Banner Trainers. To access training use the username of train01 and a password of train01, train01 has access to all forms so you can try them out. Pre-production (PPRD) is clone of production, this is where you should try out new things before doing them in production. You would use your normal username and password to access pre-production. Production (PROD) is the real database, only do real work here. You would access production with your normal username and password.

If you see the following dialog box, it means that you have put in a database name that does not exist.

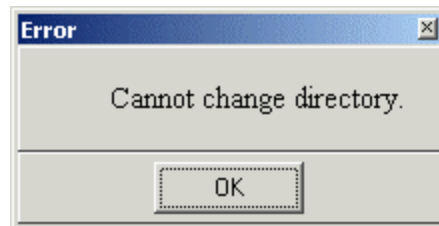


If you see the following dialog box, it means that you asked for a database that is not up. If you need it, please call CNSgroup and request that the database be brought up.




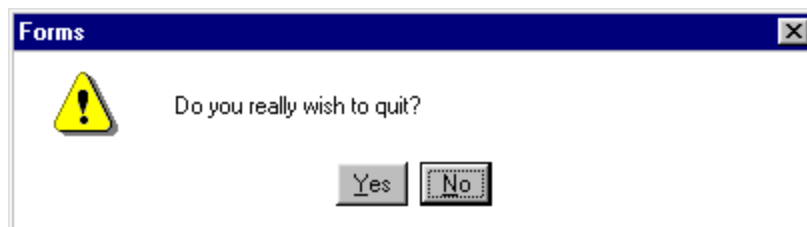


If you see the following dialog box, it means that you do not have banner mapped on your system. If you go to Windows Explore and pull down the Tools menu, select Map Network Drive. Be sure that the drive letter is **S:** is selected. Then put in the path of \\lvhucns\ban4. Then try logging into banner.



## How to Log Out (Exit)

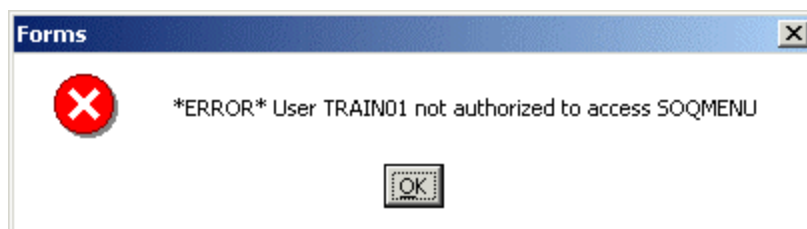
Click on the Exit icon on the Tool Bar  to exit a Banner form or Menu. Once you are on the Main Menu, click on the icon again to close Banner. You will see the following dialog box; click Yes to close Banner or No to continue working in Banner.



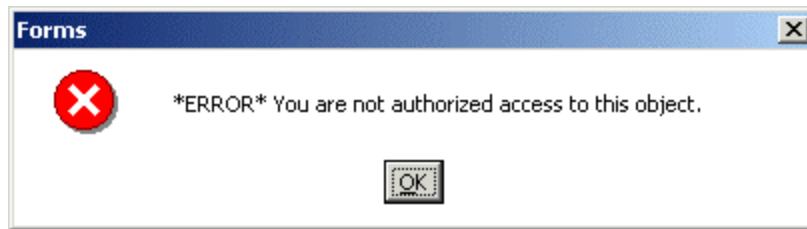
## Information You Can Access

When you request your Banner username, you will be given access to certain forms based on your job function. Not only can Banner security specify what forms you can use, but also how you can use them. Every user will be given either *Update* or *Query* privileges. This means that you will be given authorization to add, delete, or change the information displayed on the form (update) or just the ability to view (query).

If you accidentally try to view a form that you have not been given privilege to use, you will see one of the following messages:



or



Click OK to accept the message on the alert box. You can either click on a different form or re-type another form name.

The Banner access process begins with a Banner Team Leader or your supervisor. Check with that individual for more information.

Team Leader for the Modules is as follows:

- |                      |                |
|----------------------|----------------|
| • FINANCE            | Grace Montoya  |
| • ALUMNI DEVELOPMENT | Darlene Chavez |
| • STUDENT            | John Coca      |
| • FINANCIAL AID      | Eileen Sedillo |
| • HUMAN RESOURCES    | Donna Castro   |

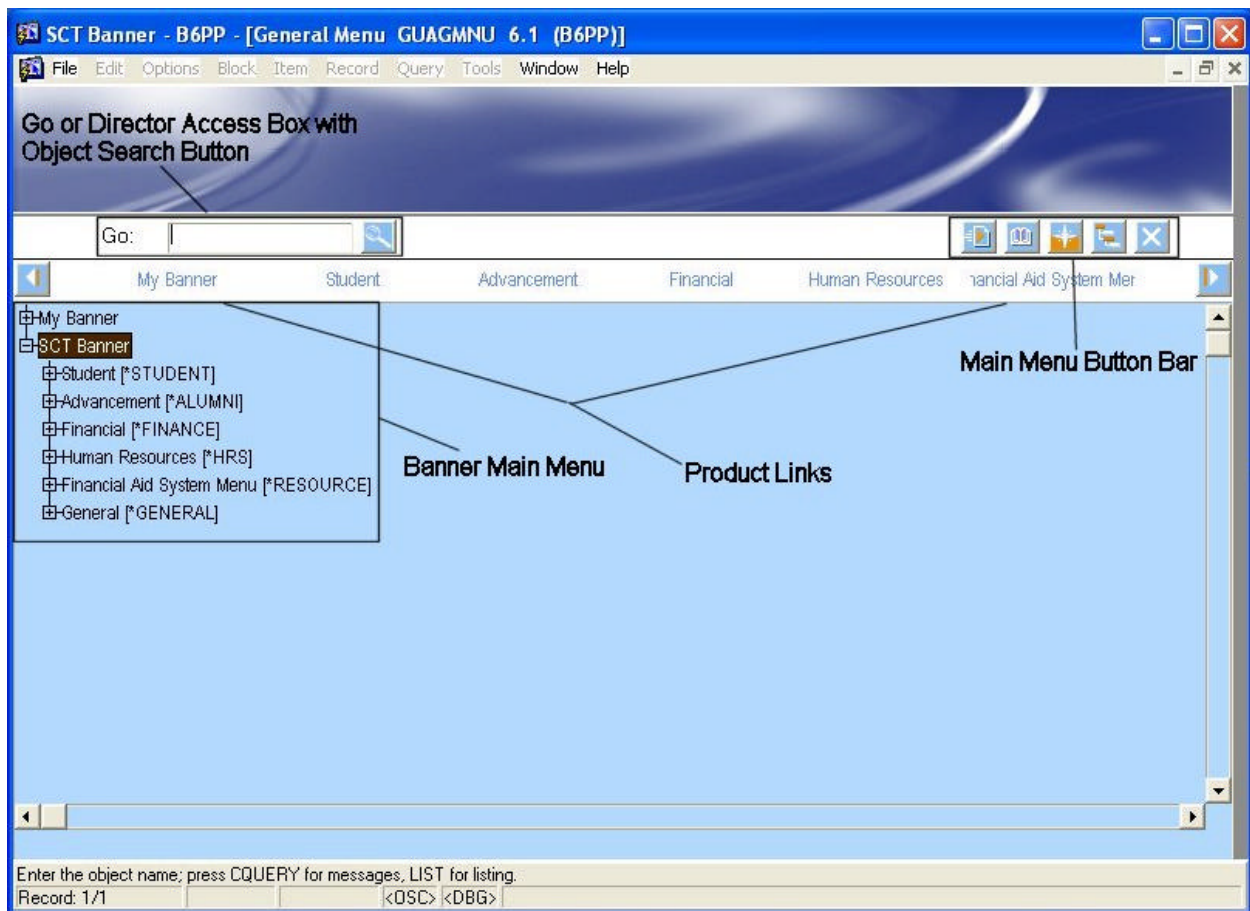
The entire Banner system, from menus to the forms, incorporates a familiar style common in many of today's popular software packages.

## Main Menu

The main menu allows you to select from a list of menus, forms, jobs, and QuickFlows in Banner.

- A main menu that can be resized, customized, and resorted.
- Direct Access.
- The ability to choose whether form names, release numbers, and database instances are displayed on form title bars.
- Menu Navigation Pull-Down List.
- Folder icons on menus.
- Iconic buttons.
- Description and Name can be sorted.
- Left and Right Pane

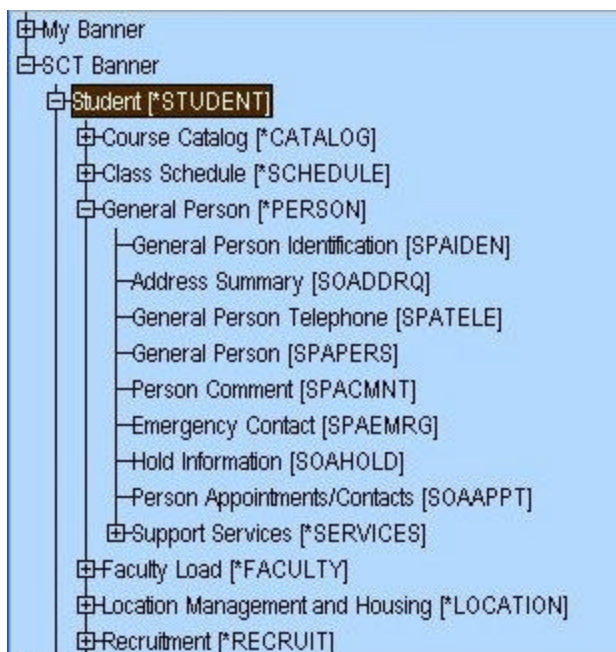
When you log into Banner, the Main Menu above appears:



The main menu provides access to the submenus, forms, jobs and QuickFlows in Banner. The main menu is made up for four parts, the Banner Main Menu, Product links, Go or Direct Access and the Main Menu Button Bar.

The main menu has a familiar Windows-style tree structure:

- The main menu displays the Banner products (menus, forms, jobs, and QuickFlows) in a hierarchical tree structure.
- The Product Links at the top of the screen allows you to navigate through the different Banner Products. This is handy if you have the main menu expanded and need to get to something that is hidden.
- Go or Direct Access allows you to access a menu, form, job, or QuickFlow by its name. The Object Search button allows you to search for a form, job, or QuickFlow by only part of its' name.
- The main menu button bar gives you a quick way to access basic menu functions, such as, Site map, return to main menu, and exit.




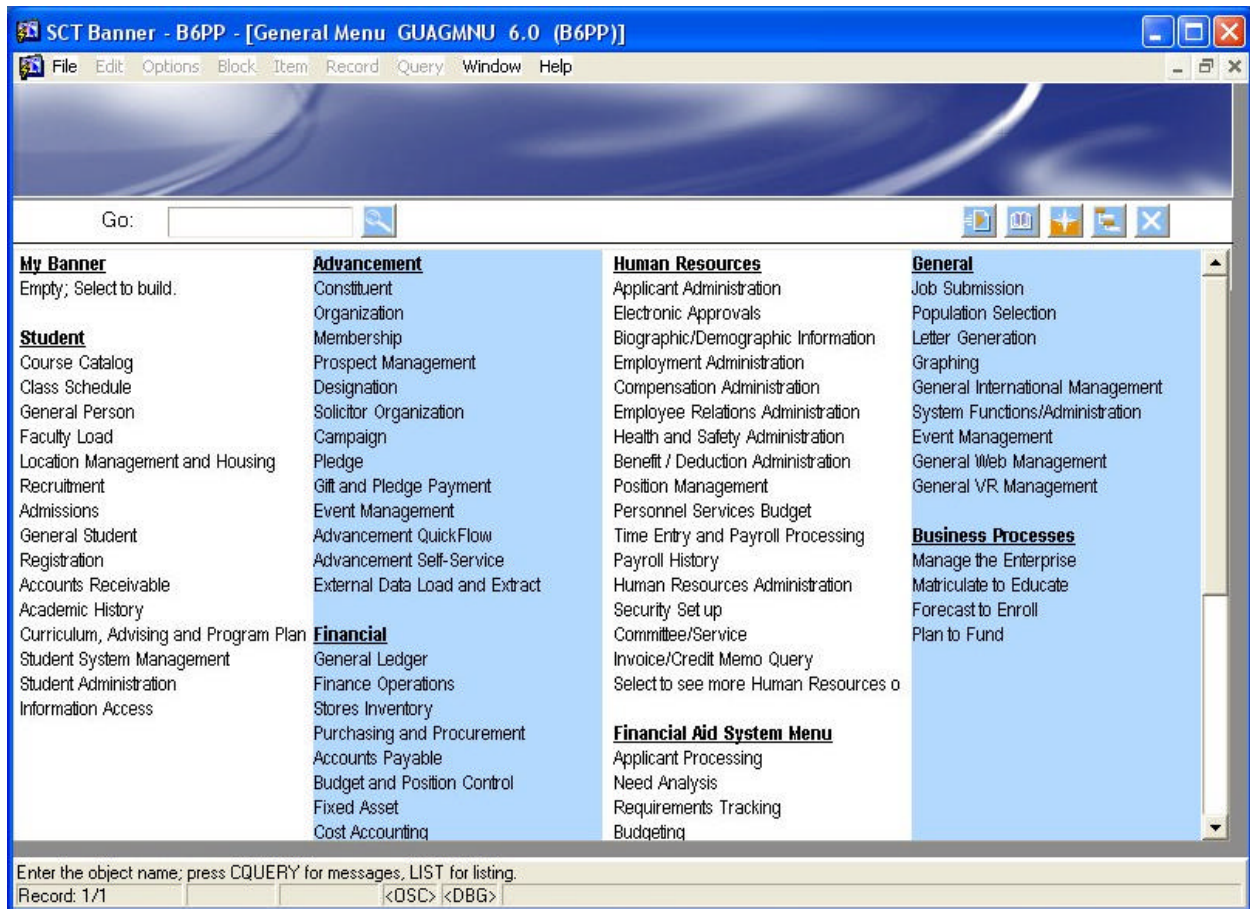
### Plus Signs and Minus Signs:

Click on these signs to expand and collapse menus within the Banner main menu tree structure:

- **Plus Sign (+):** Shows that the menu is collapsed
- **Minus Sign (-):** Shows that the menu is expanded

### Site Map

Selecting the Site Map icon  accesses the Site map. It lists the top-level menu, plus one level below for all of Banner.



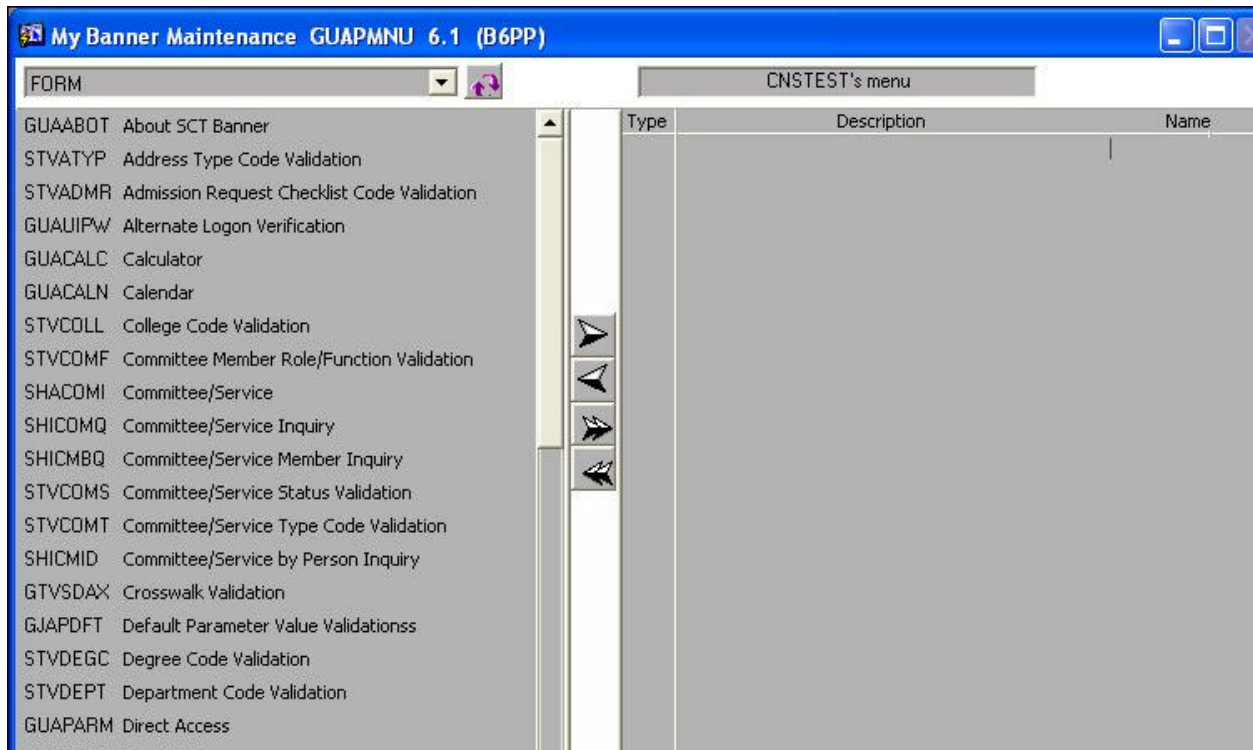
If you select a menu for the site map, the Main menu appears, displaying the menu you selected with one level expanded.

To return to the Main menu without selecting a menu from the site map, select the Menu icon

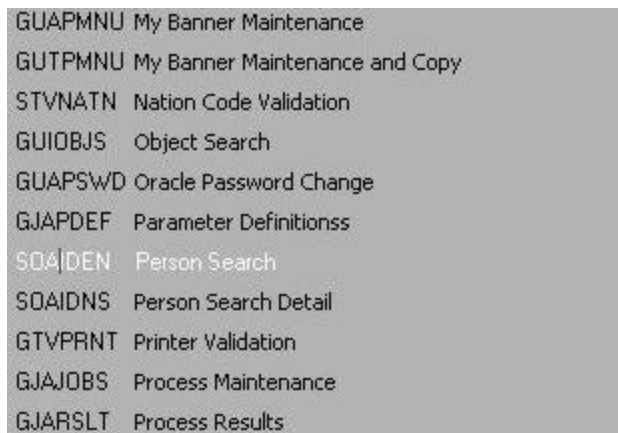




## Customizing Menus

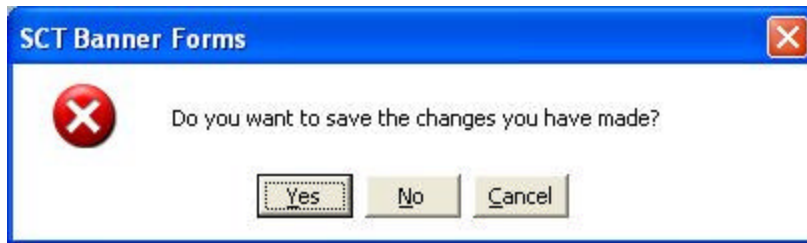
If you have forms, that you use over and over again, you can create a customized menu in the My Banner section of the Main menu. To do this you will need to go to GUAPMNU (should be the only item in the My Banner menu if you don't have one defined yet or type the from name in the Go, Direct Access Box).



One you have GUAPMNU open, you can select a form from the left side by highlighting it.



You then press the right arrow button  to move it to the right panel (under your username's menu). Once you have selected all forms you want for your menu, select the save button  or press F10 to save your menu. If for some reason, you forget to save your changes, you will be prompted to do so, before it will return to the Main menu, it this point you can choice to save the changes, not save the changes, or cancel out of the exit and return to customizing your menu.



You must log off and log back on to Banner to see the changes.

## Forms

- Menu bar
- Tool bar (Vertical and Horizontal)
- Title bar
- A navigation frame that lists all available options for navigating from the current block.
- Iconics buttons
- Blocks of information
- The ability to open more than one form at the same time.
- Auto Hint
- Status Line

The screenshot displays the SCT Banner - B6PP application window. The title bar reads "SCT Banner - B6PP". The menu bar includes "File", "Edit", "Options", "Block", "Item", "Record", "Query", "Window", and "Help". The tool bar contains various icons for file operations and data management. The navigation frame on the left lists several options: "Options", "Bio/Demo Information", "Current Name/ID", "Appointments and Contacts", "System Data Summary", and "Other Block". The main form area is titled "General Person Identification SPAIDEN 6.0 (B6PP)". It contains several input fields and buttons. A "Key Block" annotation points to the "Generate ID" button. An "Icon Buttons" annotation points to a group of buttons including "Generate ID", "Current Identification", "Person Name Information", and "Non-Person Name Information". A "Field with Validation Table" annotation points to a text input field. The form also includes fields for "ID:", "Name Type:", "Last Name:", "First Name:", "Middle Name:", "Prefix:", "Suffix:", "Pref. First Name:", and "Name:". The status bar at the bottom displays the text: "ID number; LIST for person; COUNT HITS for non-person; DUP ITEM to generate ID; DUPLICATE RECORD for Alternate ID look-up. Record: 1/1 <OSC> <DBG>".

## What can you do with a Form

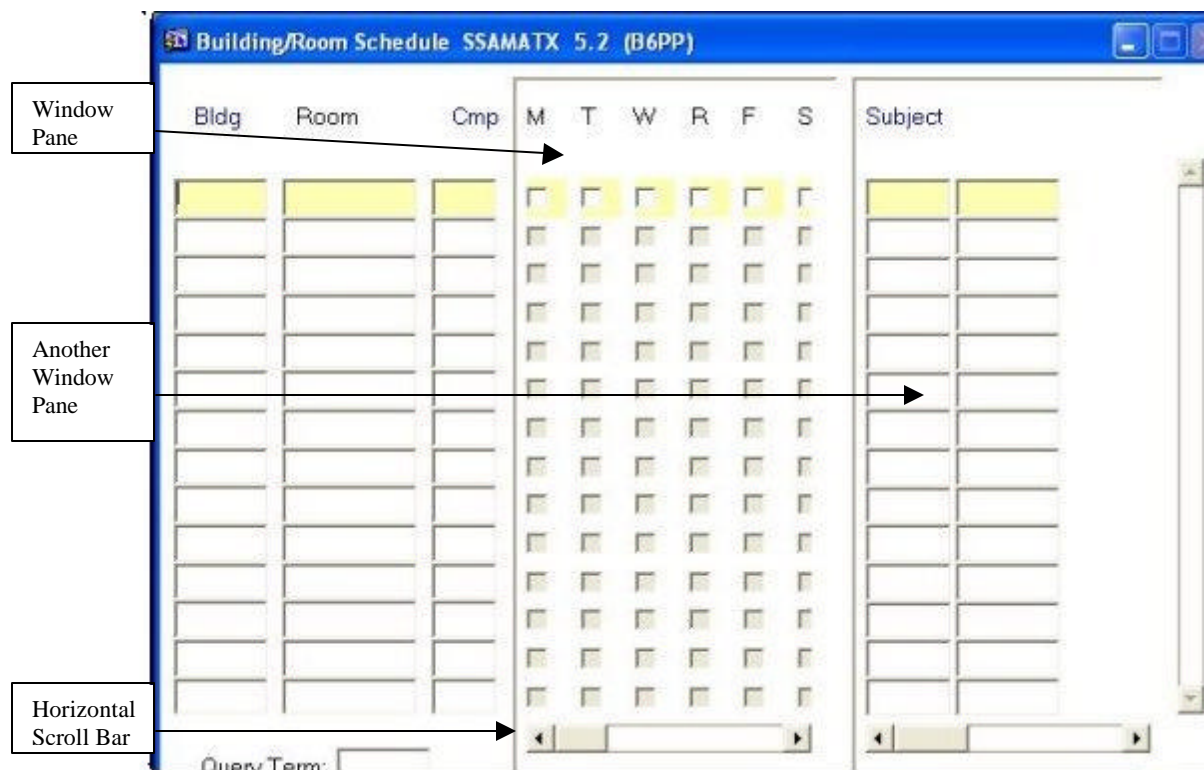
A form is where you enter and/or look up information in Banner. A form has one or more windows.

### What is a window?

A window is a framed, rectangular area within a form. A Banner form can have one or more windows. This first window in a form is called the main window. Any other windows in the form are called additional windows.

### Window Pane

A window pane is an area that has more fields than can appear in the window at one time. A solid line usually borders the pane.



A horizontal scroll bar always appears under a window pane.

### Types of Forms

**Main menu** Use this form to navigate through Banner2000. It provides an overview of the menus, forms, jobs and QuickFlows in the system.

**Application forms** Use these forms to enter, update, and query information. This is the most common type of form.

**Validation forms** Use these forms to define the values unique to New Mexico Highlands University that can be entered in specific fields on application forms. These values are used throughout Banner2000. When you look up a code or select the List function, these values appear in the List of Values window.

**Rule forms** Use these forms to define the calculations and parameters that impact processing on other forms, reports, and jobs.

**Control forms** Use these forms to define the processing rules for application and validation forms at the system level.

**Query forms** Use these forms to look up existing information, often returning information to the calling form. You must access these forms from another form. You cannot access them directly from the main menu, with Direct Access, or with Object Search.

**Inquiry forms** Use these forms to look up existing information, often returning information to the calling form. You can access these forms from the main menu or from another form, with Direct Access or with object search.

**Wizard forms** Used to give step-by-step instruction for completing an application.

## Examples of Forms

### Application Form

Application forms are used to enter, update, and query information. Each application form has a specific purpose, much like paper forms that are used within an office. An example of an Application form is SPAIDEN:

The screenshot displays the 'General Person Identification SPAIDEN 6.0 (B6PP)' application window. It features a blue title bar and standard window controls. The main interface includes a 'Generate ID' button with a magnifying glass icon, followed by an 'ID:' label and a text input field with a search icon. Below this is a section titled 'Current Identification' containing an 'ID:' label, a 'Name Type:' label, and a dropdown menu. The 'Person Name Information' section contains several input fields: 'Last Name:', 'First Name:', 'Middle Name:', 'Prefix:', 'Suffix:', and 'Pref. First Name:'. The 'Non-Person Name Information' section contains a 'Name:' label and a text input field. All input fields have search icons.

## Inquiry Form

Inquiry forms are used to look up existing information, often returning information to the calling form. You can access an inquiry form from the main menu, from another form, with Direct Access, or with Object Search.

**Function Attendance Inquiry GEIATTD 5.4 (B6PP)**

Event:

Function:   Fee Status:

System:  RSVP:  Menu:

☐ Has Guest ☐ Invitee ☐ Attended

☐ Has No Guest ☐ Guest ☐ Did Not Attend

☒ No Guest Criteria ☒ Both ☒ No Attendance Criteria

Count

ID	Name	Function	RSVP	Fee Stat	Tkts	Gst	I/G	Att

The Function Attendance Inquiry Form (GEIATTD) is an example of an inquiry form.

## Query Form

Query Forms are used to look up existing information often returning information to a calling form. You must access a query form from another form. You cannot access it directly from the main menu, Direct Access or with Object Search. An example of a Query form is SOQHOLD (Holds Query-Only Form). This form is called by SHADEGR. On this form, you can enter as much information regarding the person as possible. Hint: The more you are able to enter about a person, the more precise the search will be.

The screenshot shows a software window titled "Holds Query-Only SOQHOLD 5.4 (B6PP)". Inside the window, there is a form with the following fields and layout:

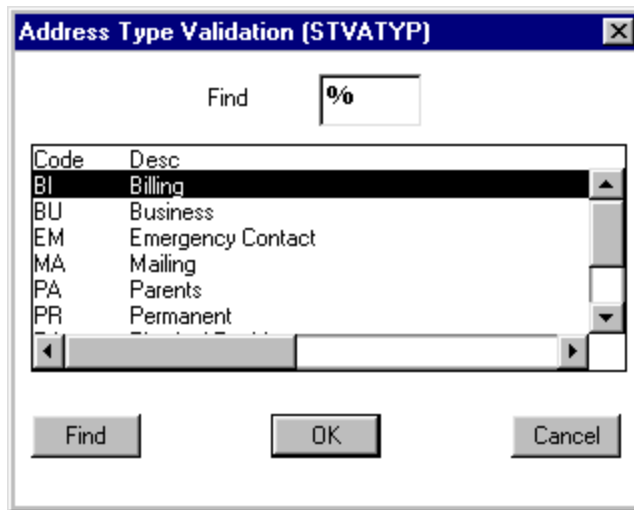
- At the top, a label "ID:" followed by a single-line text input field.
- Below this, a section header "Holds" is centered.
- The form contains three identical, vertically stacked groups of input fields. Each group includes:
  - A "Hold Type:" label with a small square checkbox to its right, followed by a wide text input field.
  - A "Reason:" label followed by a wide text input field.
  - A "From:" label followed by a text input field, and a "To:" label followed by a text input field.
  - An "Origin:" label followed by a text input field.
  - A "Rel:" label with a small square checkbox to its right, followed by a text input field.
  - An "Amount:" label followed by a text input field.

The input fields are currently empty. The form has a light beige background and a blue title bar.

The Holds Query-Only Form (SOQHOLD) is an example of a query form.

## Validation Form

Validation forms are used to define values that can be entered in specific fields on application forms. These values make up a List Of Values (LOV). STVATYP shows the valid address types used at New Mexico Highlands University throughout the Banner system.



The image shows a Windows-style dialog box titled "Address Type Validation (STVATYP)". It features a "Find" label and a text input field containing "%". Below this is a list box with two columns: "Code" and "Desc". The list contains five entries: "BI Billing", "BU Business", "EM Emergency Contact", "MA Mailing", and "PA Parents". The "BI Billing" entry is selected. Below the list box is a horizontal scrollbar. At the bottom of the dialog are three buttons: "Find", "OK", and "Cancel".

Code	Desc
BI	Billing
BU	Business
EM	Emergency Contact
MA	Mailing
PA	Parents

## Wizards Form

Wizards are used to give step-by-step instructions for completing an application.

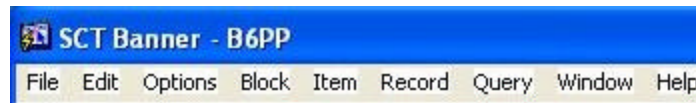
The screenshot shows a Windows-style application window titled "Wizard Step Setup Application GOADSTE 5.0 (B6PP)". The form contains several input fields and a table. At the top, there are two rows of labels and text boxes: "Add-In Code:" followed by a text box, and "Wizard Name:" followed by a text box. Below these, there are four more input fields: "Step Name:", "Step Type Code:", "Activity Date:", and "User ID:". The bottom section of the form is a table with five columns: "Property Code", "Required Ind", "Value", "Activity Date", and "User ID". The table has 10 empty rows for data entry. The "Value" column header has a small icon next to it. The table is enclosed in a scrollable frame.

Property Code	Required Ind	Value	Activity Date	User ID

The Wizard Step Setup Application Form (GOADSTE) is an example of a wizard form.

## Menu Bar

The Banner2000 menu bar, located at the top of every form, contains pull-down menus to allow you to navigate through the system.



**Note:** If a pull-down menu name is dimmed, the menu is disabled and cannot be accessed. You can access an option in a pull-down menu at any time, except when you are in a dialog box, alert box, or List of Values (LOV). (You must respond to these windows before you can access a pull-down menu.)

For example, click on Block:



This pull-down menu contains the functions used to navigate among the Blocks of information on a form.

## File Menu

This pull-down menu contains standard Banner2000 and Oracle functions. The bottom of the menu lists the last forms (up to ten) you accessed in this session. You can select any form in this list to re-access it.

Some of the menu items let you call another form, job, or QuickFlow. When you exit the called object, you return to the object you were previously using.

*Direct Access* Displays the Direct Access Form (GUAPARM), which is used to access a form by its seven-character name.

*Object Search* Displays the Object Search Form (GUIOBJJS), which is used to search for a menu, form, job, or QuickFlow with part of the name, description, or type.

*QuickFlow* Displays the QuickFlow Form (GUAQFLW), which is used to access a QuickFlow.

*Select* Returns you to the calling form and enters the selected value into the field that called the form.

*Rollback*      *Application and inquiry forms*  
Clears all information (except key information) and returns you to the first enterable field in the key block.  
*Validation forms*  
Returns you to the first enterable field on the form.  
*Query forms*  
Returns you to the first enterable field on the calling form

*Save* Saves all changes entered since the last time you saved.

*Refresh* Clears the message line.

*Print* Prints the current window with the date and time in the title bar.

*Exit*            *Forms and windows*  
Exits you from the form or window.  
*Main menu*  
Exits you from Banner2000.  
*Query mode*  
Cancels the query and takes the form out of query mode.

*Exit QuickFlow* Exits you from a QuickFlow.

*Preferences* Displays the Personal Preferences Maintenance Form (GUAUPRF), which is used to customize Banner2000 for individuals.

*List of recently accessed forms*  
Lets you quickly re-access forms that were previously accessed in this session (up to ten).

## **Edit Menu**

This pull-down menu contains the functions used to edit text items.

*Cut* Cuts selected text and places it on the clipboard.

*Copy* Copies selected text to the clipboard.

*Paste* Pastes text from the clipboard to the spot where the cursor is located.

*Edit* Displays the Editor window, which is used to enter or update text. You can display this window from most fields. It is particularly useful in long data fields.

## **Block Menu**

This pull-down menu contains the functions used to navigate among the blocks of information on a form.

*Previous* Moves the cursor to the previous block that has at least one enterable field. If the previous block is in another window, that window is opened.

*Next* Moves the cursor to the next block that has at least one enterable field. If the next area is in another window, that window is opened.

*Clear* Clears all information from the current block on your display. (Information is not removed from any records or tables.)

## **Field Menu**

This pull-down menu contains the functions used to navigate among the fields or items on a form.

*Previous* Moves the cursor to the previous enterable field in the current block.

*Next* Moves the cursor to the next enterable field in the current block. Occasionally, Next Field moves the cursor to the first enterable field in the next block.

*Clear* Clears all information from the current field on your display. (Information is not removed from any records or tables.)

*Duplicate* In a blank row of a repeating record, duplicates the contents of the same field in the previous record and copies it into the new record.

## **Record Menu**

This pull-down menu contains the functions used to work with records on a form.

*Previous* Moves the cursor to the first enterable field in the previous record and triggers previous record logic coded into the form.

*Next* Moves the cursor to the first enterable field in the next record of the current block and triggers next record logic coded into the form. If the cursor is in the last record, a new record is created.

*Scroll Up* Scrolls up the list of repeating records, putting the first displayed record near the bottom of the list.

*Scroll Down* Scrolls down the list of repeating records, putting the last displayed record near the top of the list.

*Clear* Clears all information from the current record on your display. (Information is not removed from any records or tables.)

*Remove* Removes all information for the current record. When you Save, the removed information is deleted.

*Insert* Inserts a new blank record into the list of existing records.

*Duplicate* Duplicates the contents of all fields in the record and copies them into a new record.

*Lock* Temporarily locks the contents of the record so no other Banner2000 user can update it. Save, Rollback, and Exit release the lock.

## **Query Menu**

This pull-down menu contains the functions used to query information in the database based on specified criteria.

*Enter* Puts the form into query mode so you can enter search criteria to see what information is already in the database.

*Execute* Searches the database and displays the first set of records that match your search criteria.

*Last Criteria* Enters the criteria from your last search (enabled only when you are in query mode).

*Cancel* Cancels the query and takes the form out of query mode.

*Count Hits* Counts the number of records that match the search criteria and displays that number in the auto hint.

*Fetch Next Set* If more records meet the search criteria than fit in the window, replaces the current set of displayed records with the next set.

## **Help Menu**

This pull-down menu contains various help tools, the image displayer, a calculator, and a calendar.

*Online Help* Displays new online information for the current field. **Note:** This option is disabled if online help is not available for the form.

*Dynamic Help Query* Displays the Dynamic Help Form (GUAHELP) in query mode, which is used to display traditional help for a field, block, or form.

*Dynamic Help Edit* Displays the Dynamic Help Form (GUAHELP) in edit mode, which is used to edit traditional help for a field, block, or form.

*Banner2000 Bookshelf* Provides electronic access to hardcopy documents in the Banner2000 Bookshelf.

*Help (Item Properties)* Displays the Oracle item properties window for the current field.

*Show Keys* Displays the Keys list, which lists the functions and their equivalent keystrokes available in your environment for the current form, window, and field.

*List* Displays the List of Values (LOV) for the current field if **List of Values** appears in the status line.

*Display Error* If an Oracle error occurs, displays the code that is in error.

*Display Image* If the cursor is in an **ID** field, displays the image associated with the ID, if available. *Calendar* Displays the calendar. *Calculator* Displays the calculator.

*About Banner2000* Displays the About Banner2000 Form (GUAABOT), which identifies the current form, release number, date, and time.

## Windows Menu

This pull-down menu, available only in Microsoft Windows environments, lets you arrange the open windows of a form.

*Cascade* Arranges each open window in a cascade.

*Tile* Arranges each open window in a tiled format.

*Arrange Icons* If an open window is collapsed into an icon, lets you move the icon.

*Open windows* Lists each currently open window in the active form. A checkmark identifies the active window. You can make another window active by clicking the window name or entering the window number.

## Using the Toolbars
















Toolbars are sets of iconic buttons that perform common functions. Banner2000 has two toolbars:

- The horizontal toolbar appears directly under the menu bar. This toolbar is delivered with standard buttons.
- The vertical toolbar appears on the left side of the screen.

Use the Horizontal Toolbar to navigate through the Banner system and perform most common functions.

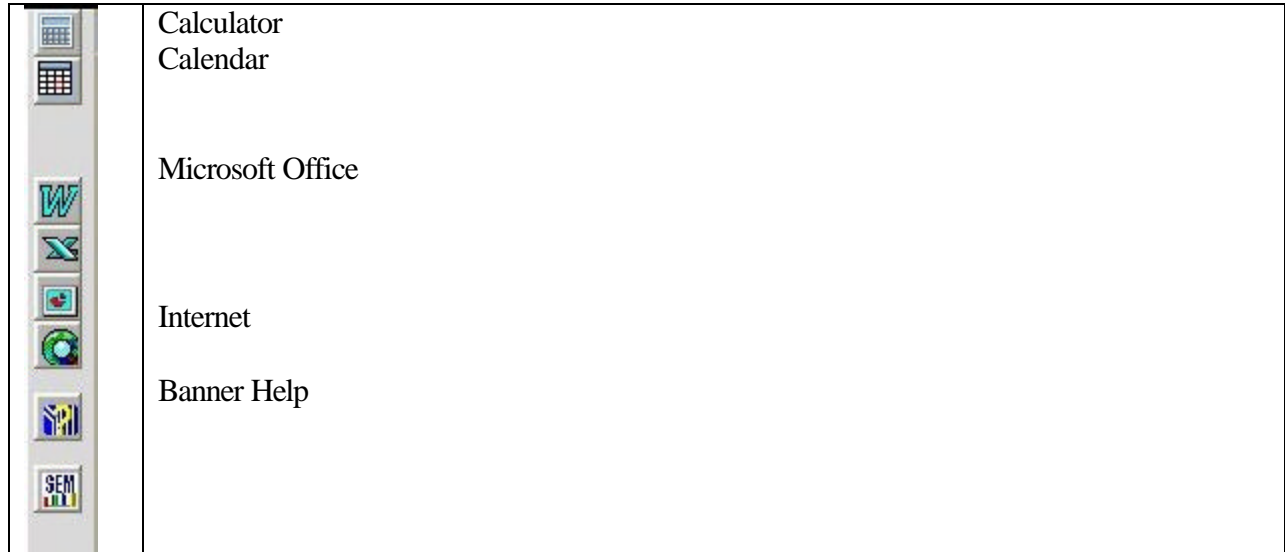


When you move your cursor to an iconic button and pause, a yellow bubble appears with text that describes the function of the button.

Icon	Action	Keystroke	Menu Bar	Description
	Save/Commit	F10	File > Save	Commits or Saves Data
	Rollback or Clear Form	Shift+F7	File > Rollback	Return cursor to Key Block or top of the form
	Select	Shift+F3	File > Select	Selects value into the field
	Insert Record	F6	Record > Insert	Inserts a new record
	Delete Record	Shift+F6	Record > Delete	Deletes record
	Enter Query	F7	Query > Enter	Begins query or search
	Execute Query	F8	Query > Execute	Executes a query or search
	Cancel Query	Ctrl+q	Query > Cancel	Cancels a query or search
	Previous Record	Shift+Up Arrow	Record > Previous	Shows previous record
	Next Record	Shift+Down Arrow	Record > Next	Shows next record
	Previous Block	Ctrl+PageUp	Block > Previous	Moves cursor to previous block
	Next Block	Ctrl+Page Down	Block > Next	Moves cursor to next window or block
	Print	Shift+F8	File > Print	Prints a screen shot
	Show Keys	Ctrl+F1	Help > Show Keys	Shows Function Keys
	Exit	Ctrl+q	File > Exit	Closes or Exits from a form

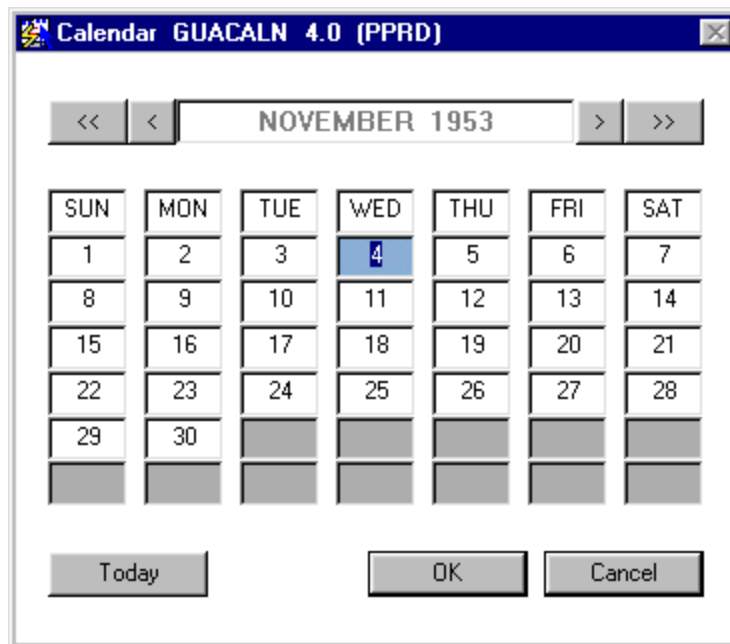
## The Vertical Toolbar

The vertical toolbar appears on the left side of the screen. The vertical toolbar contains the custom iconic buttons. You can customize this part of the tool bar to meet your specific needs. For example a calculator, calendar and web browser can be included.

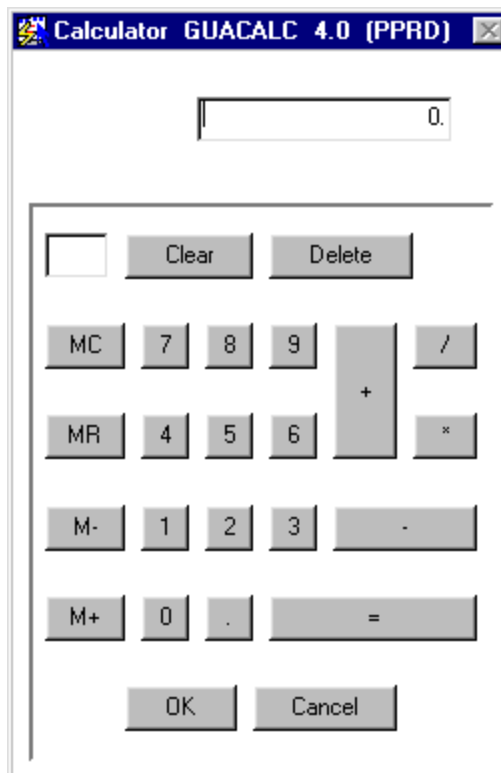


## Calendar and Calculator

You can double-click any date field to display the calendar. If the date field has a value, the calendar highlights that date. If the date field is empty, the calendar highlights the current date. You can double-click a date on the calendar to return it to the calling form.



You can double-click any numeric field to display the calculator. If the numeric field has a value, the calculator shows that value. You can use the mouse, number keys on the keyboard, or the numeric keypad (if the NumLock is enabled) to make calculations. When you're done, click the OK button to return the calculated value to the calling form.



## Form Buttons

Buttons are visual images used to perform an action or respond to the system.













Banner2000 forms use iconic buttons and response buttons.

### Iconic Buttons

These buttons are small squares that contain an icon (picture). They represent one or more actions that can be performed for the associated field or record. For example, you can use iconic buttons to display a validation form for the field, copy a record, and display a window for entering freeform text.

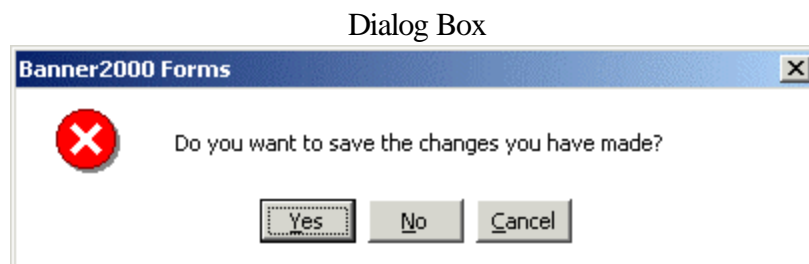
Banner2000 forms use the following iconic buttons. (Some products do not use all buttons.)

#### Icons Buttons

	SEARCH – Indicates a full – screen List of Values (LOV)– searchable field.		MAINTENANCE – indicates a maintenance function (such as Generate) is available.
	DATA – data is available for this field.		COPY – copies the current record or copies a document.
	NO DATA – no data is available for this field.		COMMENTS - displays a window where you can enter freeform text for the associated record.
	SUMMARY – displays summary information for this record.		CALCULATE – performs a calculation on data in the field.
	DETAIL – displays detail for this record.		APPROVE – approves the document.
	COMPLETE – the process is complete.		DISAPPROVE – disapproves the document.

## Response Buttons

These buttons are shaded rectangles that appear in alert boxes and dialog boxes. An alert box has one response button. A dialog box has two or more response buttons. You must use the buttons to respond to the system before you can continue.



## Radio Buttons

Radio buttons is a response button which are small circles used to select one of several options in a group. Each button represents a choice for a group. You may only choose one Radio Button in a group.



## Check Boxes



Check Boxes, such as the Dual Degree indicator are selected or deselected. There are also Check Boxes that indicate action has been taken or requirements have met specific rules set up in Banner. These boxes, such as in the Outstanding Requirement field, are indicators only and cannot be edited.



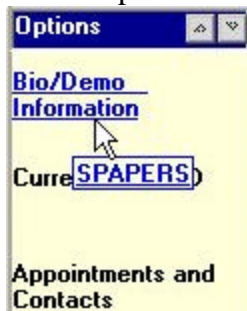
## Navigation Frame (Options)

The navigation frame on the left side of a form shows the navigational options. The options depend on the current location of the cursor. Some options take you to other blocks and windows within the current form. Other options take you outside the current form to other related forms.



The Options menu shown is from form FPIPURR. Click on the Options to move through the Information Blocks on FPIPURR or to navigate to other related forms. When the Scroll Buttons are black, there are more options than can be viewed on one page:  Click on the Down Scroll Button on the right side to view additional options. When the Scroll Buttons are gray, the only Options available are those you see on one page: 

A Help bubble appears when you move the cursor over an option that takes you outside the form.



## Fields

**Note:** A field is sometimes called an item. This is the case in the names of the functions *Next Item*, *Previous Item*, and *Duplicate Item*.

Fields are areas on a form where you can enter, query, change, and display specific information. The following terms describe a field:

- *Enabled.* You can put the cursor in the field. Information in the field appears in black text.
- *Disabled.* You cannot put the cursor in the field. Information (if it exists) appears in gray text.

- *Enterable*. You can enter information in the field. The field is usually enabled. In certain situations, however, it may be disabled.
- *Display only*. You cannot enter information in the field.

The color of some field names is **BLUE**. This means that there is a Validation Table that can be accessed from that field for a valid list of entries.


The screenshot shows a Banner 4 form with the following fields and values:

- Gender:** Radio buttons for Male (selected), Female, and Not Available.
- Date of Birth:** Text box containing "12JUN-1944".
- Age:** Text box containing "55".
- SSN/SIN/TFN:** Text box containing "000000002".
- Confidentiality:** Check box (unchecked).
- Last Web Access:** Text box (empty).
- Citizen:** Text box containing "Y". To the right, the word "Citizen" is displayed.
- Ethnic:** Text box containing "1". To the right, the word "White" is displayed.
- Marital:** Text box containing "M". To the right, the word "Married" is displayed.
- Religion:** Text box containing "N". To the right, the word "Presbyterian" is displayed.
- Legacy:** Text box (empty).
- Vet File No:** Text box (empty).
- Vietnam Era:** Text box containing "None".
- Deceased:** Check box (unchecked).
- Deceased Date:** Text box (empty).

There is a Validation form for the Citizen, Ethnic, Marital, Religion, and Legacy fields on the above form.

## Searching the Database

Banner search forms allow you to search by name, by id, or if you are unsure of the spelling, or if you only know part of the name.

If you want to search for a person, click on the Search icon  after the ID field:

The screenshot shows a Banner search form with the following fields:

- ID:** Text box (empty).
- Search icon:** A blue magnifying glass icon located to the right of the ID field.

This will take you to a search form. All search forms, whether you are searching for a person or id, perform the same way. When you enter the form, it will be in query mode. This means that it's ready for you to enter any information that will assist Banner to locate the record. For example, to find the record of John T. Roth, the best search would include Roth in the *Last Name* field and John in *First Name*. That would return all the **John Roths** that exist within the database. If more than one exists, then you could view the records and select the appropriate one. This is a very precise search. You have

specified a *First* and *Last* name. Very few records should be returned from your search. Many times, unless it's a very common name, this type of search will bring back only the record you desire.

If you do not enter such a precise search and only enter Roth in *Last Name* and no information in *First Name* or *Middle*, the system would return all Roth records that exist within the database. The rule of thumb is: **the more information you provide for the search, the fewer the records you must view to find the one you desire.**

If you do not want to do a Case Sensitive search, change the default "Yes" by clicking the "No" Radio Button at the bottom of the form:

Case Sensitive Query?  
☐ No    ☒ Yes

Although at NMHU we use mixed case to enter names (i.e., Roth instead of ROTH or roth), it would be wise to click "No" to search for names like McDonald.

### Wildcards %

Sometimes, you don't know much information about a person, i.e. spelling, complete name, etc. In that instance, you can use a special symbol known as a wildcard, along with as much information as you know to perform the search. Banner uses the wildcard symbol, %, to stand for one or more characters. Banner uses the wildcard symbol, \_, to stand for one character only.

Example: Suppose you would like to find the record for a person whose last name is Kelley and first name is Sally. However, you are unsure if the last name is spelled Kelly or Kelley, you can enter Kell% in the *Last Name* field and Sally in the *First Name* field. Banner will return records whose Last Name begins with Kell AND whose first name is Sally. Therefore, you would see records for Sally Kelly; Sally Kelley; Sally Kellogg; etc., because the records matched the criteria.

### More Examples of Wildcards

<i>To get these results</i>	<i>Enter this criteria</i>
All entries that contain <i>ma</i>	%ma%
All entries that begin with <i>ma</i>	ma%
All entries that have <i>ma</i> as the final two characters	%ma
All entries that have <i>m</i> as the second character	_m%

### Executing Queries


Once you have entered the information and would like to search the database, you must execute the query. There are several ways to do this:

Click on the Execute Query button on the Toolbar 


Use the keyboard command for Execute Query (F8).


Click on the Query pull down menu, and then select Execute.


## Searching: The Basics

Enter a query form either by typing the inquiry form name at the menu prompt or by clicking on a Search Light .

Enter the information in the appropriate fields of the query form. Enter enough information to narrow down the list of records to a manageable size. You can use the wildcard if some information like spelling is unknown.

Execute the query .

If you do not get the desired results, click on the Rollback  button. The form will be cleared and reset in query mode for you to try again!

Click the Select button  to return the desired record back to the calling form.

## Multiple Records of Same Name

If your search for Judy Johnson returns multiple records, click "Search and Display More Detail".

Person Search Form SOAIDEN 4.3 (TRNG)		
ID	Last Name	First Name
610009607	Johnson	Judith
601000010	Johnson	Judy
610009607	Johnson	Judy

This will take you to a detailed search form, Execute a Query, and you will retrieve detail records of all of the Judy Johnson in the database.

**Person Search Detail Form SOAIDNS 4.0 (TRNG)**

ID Number	Last Name	First Name	Middle Name	Birthdate	Sex	Ch
610009607	Johnson	Judith	Janine	15-JAN-1977	F	
601000010	Johnson	Judy				
610009607	Johnson	Judy		15-JAN-1977	F	N

Terms Reg: 199610


Soundex Search: Sounds Like... Last: First:

General Student

Term	Status	Level	Type	Degree	College	Major	Adm	Res	Admit Term	Activity Date
199810	AS	UG	C	BA	AR	ANTH		R	199810	19-JUN-1997

Address Information

Type	Street	City	St/Prov	ZIP/PC	Phone No.
PR	1610 West Lane	Janesville	WI	53547	
RH	Lauren Residence Hall 101	Malvern	PA	19355	

Highlight the record you wish to retrieve, and click  or double click on record to return to the calling form (Note that the record we wanted was Judith, instead of Judy).

### Auto Hint and Status Bar

FRM-40200: Field is protected against update.  
Record: 1/?

The auto hint at the bottom of the form can contain the following information for the field where the cursor is located:

- Brief field description
- Error and processing messages
- Keyboard equivalents, if you can access other blocks, windows, or forms from the field

**Tip:** If you have typed something that is not allowed in the field, read the message on the Auto-Hint line. To clear the message, select the Help key once, this will re-display the original information about that field.

The status line directly under the auto hint can contain one or more of the following messages:

- **Record n/n:** Shows the number of the current record followed by the total number of records in the current block. If there are more records than fit in the windows, the total appears as a question mark (for example, 1/?) until you scroll to the last record in the block. Once the last record is displayed, the total appears as a number (for example, 1/15).
- **List of Values:** Indicates the field had a List of Values (LOV).
- **Enter Query:** Indicates the form is in query mode.

## How to Change Your Password in Banner

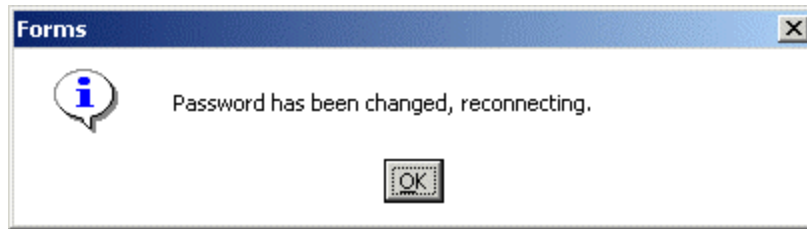
1. Double click the Banner icon on your desktop. When Banner's opening screen appears (below), type GUAPSWD in the Direct Access box on the Main Menu in Banner and press the ENTER key on your keyboard.

The Oracle Password Change Form (GUAPSWD) will appear on the screen. (Below)

The screenshot shows a window titled "Oracle Password Change Form GUAPSWD 4.1 (PPRD)". Inside the window, there are five text input fields arranged vertically. The first field is labeled "Oracle User ID:" and contains the text "TRAIN01". The second field is labeled "Oracle Password:" and is empty. The third field is labeled "Database:" and contains the text "PPRD". The fourth field is labeled "New Oracle Password:" and is empty. The fifth field is labeled "Verify Password:" and is empty. At the bottom right of the window, there are two buttons: "OK" and "Cancel".

2. In the Oracle User ID field enter your Username, if it is not already in the field.
3. In the Oracle Password field, enter your current Banner password.
4. In the Database field, enter the name of the database, if it is not already in the field.
5. In the New Oracle Password field, enter your new password.
6. In the Verify Password field, re-enter your new password and press the Save button.

When successful the following message will be displayed:



Click OK. You have successfully changed your password.

### **Password Security**

- Access is a privilege granted to you; please use it responsibly.
- Never share your password.
- Never allow anyone to logon to or use your username.
- Don't even share a password with your supervisor.
- Avoid writing your password down.

### **Banner Problem Reporting**

If you experience a problem with Banner2000, report the problem to the CNSgroup: 454-3496.

You should provide the Help Desk with the following information:

Your Banner Username

Description of the problem

Any form names (e.g. SPAIDEN) that are involved

Any error numbers (ORA-00942) if available

Go to the pull down menu Help, then do a Display Error

What were you attempting to do that triggered the error?

Is it an isolated incident?

Priority: Critical, Can Work Around, Low

## Form Naming Conventions

Banner2000 forms, reports, jobs and tables have seven-character names with the following structure:

<b>Position 1</b>  Identifies the primary system owning the form, report, job or table.	<b>A</b> Alumni/Development	<b>L</b> Occupational Tax/License	<b>U</b> Utilities
	<b>B</b> Property Tax	<b>N</b> Position Control	<b>V</b> Voice Response
	<b>C</b> Courts	<b>O</b> Customer Contact	<b>X</b> Records Indexing
	<b>D</b> Cash Drawer	<b>P</b> HR/Payroll/Personnel	<b>W, Y, Z</b> Reserved for client applications that co-exist with Banner 2000
	<b>F</b> Finance	<b>Q</b> Electronic Work Queue	
	<b>G</b> General	<b>R</b> Financial Aid	
	<b>I</b> Information Access	<b>S</b> Student	
	<b>K</b> Work Management	<b>T</b> Accounts Receivable	
<b>Position 2</b>  Identifies the module owning the form, report, job or table.	<b>General (G)</b>	<b>Student (S)</b>	<b>Finance (F)</b>
	<b>E</b> Event Management	A Admissions	A Accounts Payable
	<b>J</b> Job Submission	C Catalog	B Budget Development
	<b>L</b> Letter Generation	E Support Services	C Cost Accounting
	<b>O</b> Overall	F Registration/Fee Assessment	E Electronic Data Interchange
	<b>P</b> Purge	G General Student	F Fixed Assets
	<b>S</b> Security	H Grades/ Academic History	G General Ledger
	<b>T</b> Validation form/table	I Faculty Load	I Investment Management
	<b>U</b> Utility	K Reserved for SCT Intl. - UK	O Operations
	<b>X</b> Cross product	L Location Management	P Purchasing/Procurement
	<b>Accounts Receivable (T)</b>	M CAPP	R Research Accounting
	F Finance Accounts Receivable	O Overall	S Stores Inventory
	G General Accounts Receivable	P Person	T Validation form/table
	O Overall	R Recruiting	U Utility
	S Student Accounts Receivable	S Schedule	X Archive/Purge
	T Validation form/table	T Validation form/table	
	U Utility	U Utility	
	<b>Financial Aid (R)</b>	<b>HR/Payroll/Personnel (P)</b>	<b>Alumni / Development (A)</b>
		<b>Position Control (N)</b>	
	<b>B</b> Budgeting	<b>A</b> Application	<b>A</b> Membership
	<b>C</b> Record Creation	<b>B</b> Budget	<b>D</b> Designation
	<b>E</b> Electronic Data Exchange	<b>C</b> COBRA	<b>E</b> Event Management
	<b>F</b> Funds Management	<b>D</b> Benefits/Deductions	<b>F</b> Campaign
	<b>H</b> History and Transcripts	<b>E</b> Employee	<b>G</b> Pledge and Gift/Pledge Management
	<b>J</b> Student Employment	<b>H</b> Time Reporting/History	<b>M</b> Prospect Management

	<b>L</b> Logging	<b>O</b> Overall	<b>O</b> Organization
	<b>N</b> Need Analysis	<b>P</b> General Person	<b>P</b> Constituent/Person
	<b>O</b> Common Functions	<b>R</b> Electronic Approvals	<b>S</b> Solicitor Organization
	<b>P</b> Packaging & Disbursements	<b>S</b> Security	<b>T</b> Validation form/table
	<b>R</b> Requirements Tracking	<b>T</b> Validation/ rule table	<b>U</b> Utility
	<b>S</b> Student System Shared Data	<b>U</b> Utility	<b>X</b> Expected Matching Gift
	<b>T</b> Validation form/table	<b>X</b> Tax Administration	<b>Information Access (I)</b>
	<b>U</b> Utility		<b>S</b> Student
			<b>R</b> Financial Aid
	<b>All Products</b>		
	<b>W, Y, Z</b> Reserved for client forms or modules used within a Banner2000 application (character in position 1 does not equal W, Y, or Z)		

<b>Position 3</b>  Identifies the type of form, report, job, or table.	<b>General (G)</b>	<b>Student (S)</b>	<b>Finance (F)</b>
	<b>A</b> Application Form	<b>A</b> Application Form	<b>A</b> Application Form
	<b>B</b> Base table	<b>B</b> Base table	<b>B</b> Base table
	Batch COBOL process		
	<b>I</b> Inquiry form	<b>I</b> Inquiry form	<b>I</b> Inquiry form
	<b>O</b> Online COBOL process	<b>P</b> Process	<b>M</b> Maintenance form
	<b>Q</b> Query form	<b>Q</b> Query form	<b>Q</b> Query form
	<b>R</b> Rule table	<b>R</b> Rule table	<b>R</b> Rule table
	Repeating Table	Repeating Table	Repeating Table
	Report/process	Report/process	Report/process
	<b>T</b> General maintenance	<b>V</b> Validation form/table	<b>V</b> Validation form/table
	Temporary table	View	View
	<b>V</b> Validation form/table		
	View		
	<b>Accounts Receivable (T)</b>		
	<b>A</b> Application form	<b>P</b> Process	<b>R</b> Report
	<b>I</b> Inquiry	<b>Q</b> Query	<b>V</b> Validation form/table
	<b>Financial Aid (R)</b>	<b>HR/Payroll/Personnel (P)</b>	<b>Alumni/Development (A)</b>
		<b>Position Control (N)</b>	
	<b>A</b> Application form	<b>A</b> Application form	<b>A</b> Application form
	<b>B</b> Base table	<b>B</b> Base table	<b>B</b> Base table
		Batch COBOL process	
	<b>I</b> Inquiry form	<b>I</b> Inquiry form	<b>C</b> Called/list form
	<b>P</b> Process/report	<b>P</b> Process	<b>I</b> Inquiry form

	<b>R</b> Rule table	<b>R</b> Rule table	<b>P</b> Process/report
	Repeating Table	Repeating Table	
	Report/process	Report/process	
	<b>T</b> Temporary table	<b>V</b> Validation form/table	<b>R</b> Repeating rules table
	<b>V</b> Validation form/table	<b>Information Access</b>	<b>V</b> Validation form/table
	View	<b>R</b> Report	View
<b>Positions 4, 5, 6 and 7</b> uniquely identify the form, report, job, or table.			

For example,

F	O	A	I	D	E	N
<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>

Using the structure shown above, FOAIDEN is a Finance (position 1), Operations (position 2), Application (position 3) form that has an English-like name of IDEN which stands for Identification. Likewise, SPAIDEN is a Student (position 1) Person (position 2) Application (position 3) form that has an English-like name of IDEN which stands for Identification.

### More Examples:

SHRROLL	
S	Student
H	Grades/Academic History
R	Report
ROLL	Grade Roll

STVSTAT	
S	Student
T	Validation form/table
V	Validation form/table
STAT	State/Province Code



### Short Cut Keys

Key(s)	Function
F10	Save
Shift F7	Rollback
Shift F3	Select
F6	Insert Record
Shift F6	Delete Record
F7	Enter Query
F8	Execute Query
Ctrl Q	Cancel Query/Exit
Shift F8	Print
Ctrl PageUp	Previous Block
Ctrl Page Down	Next Block
Ctrl Q	Exit