A Guide to Using Banner



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Format Conventions

On-screen information appears in bold	E: Error!
Commands and options you select are <u>underlined</u>	Save
Subsequent directions are indicated by an angle bracket	>
Information you must type in is enclosed in square brackets	[Password]
Keys that you press are enclosed in angled brackets	<f2></f2>

Icons

The following icons are used to identify helpful information:



Timesaver Tip



Item of Interest



Warning Message



Reading

Learning the Basics

How to Log on to Banner 8 PROD

In the Address Block of Internet Explorer type:

- <u>http://www.ban**web**.mtu.edu/banner8</u>
- You then get the following log on screen

Logon >>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>	< ×
Username:	
Password:	
Database: proddb	
(Connect Cancel	

Type in the details as follows:

Username:	kegiddin	Tab
Password:	*****	Enter
Click on Co		

Do not use the Return/Enter key to move between the Username and Password fields. Use the Tab key or point and click.

Once you have completed these steps, the Banner Main Menu appears:

🛃 PROD Banner8	
File Edit Options Block Item Record Query Tools Help	
	x
🙀 General Menu 🛛 GUAGMNU 8.0 (PROD) - Thursday July 23, 2009 - Last login Wednesday July 22, 2009 09:06 AM	±∂×
Go To Welcome, Karen Giddings. Products:	Menu <u>Site Map</u> <u>Help Center</u>
My Banner	My Links
Banner	
Main Student [*STUDENT]	Change Banner Password
Advancement [*ALUMNI]	Check Banner Message
Financial [*FINANCE]	Personal Link 1
Human Resources [*HRS]	
Financial Aid [*RESOURCE]	Personal Link 2
General [*GENERAL]	Personal Link 3
Banner Security [*SECURITY]	Personal Link 4
	MTIL Documentation
	<u>mo boomontation</u>
	Discoverer
	My Institution
Banner Main	
Menu	
Banner Broadcast Messages	
	v
Enter the object name; Press LIST for listing.	ī
Record: 1/1 <0SC>	

There will be a second window that must remain open while your Banner session is open.



Exiting Banner



There are several ways to quit/close Banner as shown below. Choose one of these options from the Main Menu.



File>Exit SCT Banner (This will close all open canvases as well)

Click the Exit button on the horizontal toolbar.

Press these shortcut keys.

Click the close button on the title bar.

Type *Exit* in the **Go To** field.

Double-click the Banner control icon.

Click on File>Exit in the menu bar

Click on File>Exit in the menu bar

Using the Mouse and Keyboard

You can perform Banner functions with either a mouse or keyboard or by using a combination of both. For example you can save information by clicking a button on the toolbar, selecting an item from a pull-down menu or pressing equivalent key strokes.

Two symbols appear throughout the manuals to indicate the choice of mouse or keyboard instructions:

A	Mouse instructions
	Keyboard instructions

Mouse

You can use the mouse to navigate to an enterable field, record, block, or window that is currently displayed. You can also use the mouse to click iconic buttons.

Keyboard Equivalents

You can use keyboard equivalents for a function depending on your environment – some keystrokes vary from one environment to another. The Help Menu or the Show Keys button on the toolbar lists all keyboard equivalents for the current form, window and field.

To move between fields in a form use the <Tab> key (Next Field) or <Shift+Tab> (Previous Field). In some fields the cursor automatically moves to the next field as soon as you enter the required number of characters.



Keys COCOCOCOCOCOCOCO	******************	$\cdot \times$
Eunction	Kov	
Clear Field	Ctrl+U	
Count Query Hits	Shift+F2	8
Display Error	Shift+F1	2
Down	Ctrl+L	
Down	Down	
Enter Query	F7	
Execute Query	F8	
Exit	Ctrl+Q	
Function 2	Shift+Ctrl+F2	
	G	
	(<u> </u>	K)

The Main Menu



The main menu provides an overview of the menus, forms and other information available in Banner. You can use the main menu to navigate through Banner. The main menu has a familiar Windows-style hierarchical tree structure.

 The Product Links at the top of the screen allow you to navigate through the different Banner products.



The large pane of the main menu displays two menus:

- **My Banner.** This menu contains the menus, forms, jobs and QuickFlows most important in the workday of the individual user. This menu is tied to a user's Oracle user ID.
- **Products Menu.** This menu organizes menus, forms, jobs and QuickFlows.

Expanding and Collapsing Menus



The hierarchical tree structure can be expanded and collapsed:

- When a menu is expanded, the next level of menus is visible.
- When a menu is collapsed, the next level does not appear.

By expanding and collapsing menus, you can easily navigate through Banner. Double click on the file folder to expand the menu so you can see the objects it contains. Double click it again to collapse it.

My Links

You can now add Personal links to the Banner Main Menu. By default, the first 2 and last 2 have been set up for you. You can add links of your own if you would like, and you can change the last two links to something you use more often.

To add or change Personal Links:

- 1. Access the User Preferences form by going to the file menu and selecting Preferences.
- 2. Select the My Links Tab
- 3. Enter the "personal link" name for the link you want to change in the User Value field.
- 4. Enter the URL (actual web address) for the link you want to change in the next **User Value** field.
- 5. Click the **Save** icon or press the F10 key to save your changes.

🕌 PROD Banner8: O	pen > GUAUPRF
Eile Edit Options	: Block Item Record Query Tools Help
(🖴 🖉 🗎 🛛 🍋	, 🖷 🗃 🗑 i 🎓 🛐 🛱 🖼 i 🕰 i 🖳 i 🖳 i 🖳 i 🎠 i 🌵 i 🗇 i 🎯 i 🍚 i 🗙
🧑 General User Pr	references Maintenance - GUAUPRF-8.0 (PROD) 2000000000000000000000000000000000000
Display Options	Directory Options My Links Menu Settings LDAP
Description:	Enter the URL for the "My Institution" link.
Default Value:	http://www.mtu.sdu/
User Value:	http://www.mtu.edu/
Description:	Enter the description for the "My Personal Link 1" link.
Default Value:	Your first personal link description
User Value:	Your first personal link description
Description:	Enter the URL or Banner object for the "My Personal Link 1" link.
Default Value:	Your first personal link URL
User Value:	Your first personal link URL
Description	Enter the decorption for the "My Bergonal Link 2" link
Default Values	Unit and address of the description
Derault Value.	Tour second personal mix description
user value.	
Description:	Enter the URL or Banner object for the "My Personal Link 2" link.
Default Value:	Your second personal link URL
User Value:	Your second personal link URL
L	
Enter user specific s	settings.
Record: 1/13	<08C>

Forms



A Banner form is an online document where you can enter and look up information in the database. A form organizes information – information is entered once and then used by other forms and reports or to produce queries.

Forms can include windows, window panes, dialog boxes and alert boxes.

Accessing a Form

There are a number of ways to access a Banner form.

Go	1. Type in the seven-character name of field.	the form in the Go To
OD	2. Press <enter>.</enter>	
<u>OK</u>		
Main menu	Select the form from the menu list in B	anner.
	File Edit Options Block Item Record Query Tools Help	
		〕[월⊉[∉[⊕[@[©[♀[X
	a General Menu GUAGMNU 8.0 (PROD) - Thursday July 23, 2009 - Last logi	n Wednesday July 22, 2009 09:06 AM
	Go To Welcome, Karen Giddings.	Products: 🗹 👖
	My Banner	
	Main Student [*STUDENT]	
	Course Catalog [*CATALOG]	
	Basic Course Information [SCACRSE]	
	Course Detail Information [SCADETL]	8
	Cotalog Prerequisite and Test Score Restrictions [SCAPRI	EQ]
	Catalog Schedule Restrictions [SCASRES]	
	Course Base Maintenance [SCABASE]	
	Course Labor Distribution [SCACLBD]	
	Course Syllabus [SCASYLB]	
	Course Search [SCASRCH]	
	Class Schedule [*SCHEDULE]	
	General Person [*PERSON]	
	Location Management and Housing Module [*LOCATION]	
OR		
File pull-down me	$n_{\rm H}$ Vou can re-access the last 10 forms that	were previously opened in
The pull-down me	the current session	Eile Edit Ontions Black Item Record O
	the current session.	Direct Access
		Object Search
	1. Click on the File pull-down menu.	QuickFlow
	2. Select the form.	Rollback
<u>OR</u>		Save
		Refres <u>h</u> Print
Keystrokes	1. You can press F5. Enter the Form	Exit
	name in the Go To field.	Exit QuickFlow
	2. Press <enter></enter>	Exit SCT Banner Return to Menu
		Preferences
OR		1. SPAIDEN General Person Identification
	1 Arrow up or down in the Co To field	d to access forms used
	1. Allow up of down in the Oo To her	a to access forms used
	auring this session.	
	2. Press <enter> when the form you w</enter>	ant appears in the Go To
	field	
<u>OR</u>		
	1. Click on the File pull-down menu	
	2. Click on Direct Access	
	3. Type the seven character name of the	ne form in the Go To field

Parts of a Form

The following figure shows the parts of a Banner form. Each part is described on the following pages.

Menu bar Horizontal Toolbar	불 PROD Banner8: Open > SPAIDEN File Edit Options Block Item Record Query Iools Help [문화 20] [관 4년 조 등 [금 20] [금 20] [금 1 요 문 [관 20] [4] [4			
Navigation Tabs ———	ID: Generate ID Current Identification Alternate Identification Address Telephone Biographical E-mail	Emergency Contact Additional Identification		Key block
Title bar ——	Person Last Name: First Name: Prefix: Suffix:	ID and Name Source Last Update User: Activity Date: Origin:		Other block
	Preferred First Name: Full Legal Name: Non-Person Name:	Original Creation User: Create Date:		
Auto hint	D number, LIST for person; COUNT HITS for non-person; DUP ITEM to generate ID; DUPLICATE RECORD for Alternat	te ID look-up.]	

Menu Bar

The Banner menu bar, located at the top of every form, contains pull-down menus. <u>Eile Edit Options Block Item Record Query Tools Window Help</u>



If a pull-down menu is dimmed, it cannot be accessed.

To access an option on the menu bar:

Mouse 🕀

- 1. Click on the desired pull-down menu name.
- 2. Click the desired menu item.

Keyboard 🗺

- 1. Press the <Alt> key. The cursor moves to the menu bar.
- 2. Use the right and left arrow keys to highlight the desired name. Press <Enter>.

File Menu

Direct Access				
Object Search				
QuickFlow				
Select				
<u>R</u> ollback				
Save				
Refres <u>h</u>				
Print				
Exit				
Exiț QuickFlow				
Exit SCT <u>B</u> anner				
Return to <u>M</u> enu				
Preferences				
1. EGAJVCD Journ	al Voud	her Ei	ntry	
2. EGIJVCD List of	Suspe	nded .	lournal	Vouchers
3. <u>S</u> PAIDEN Gener	ral Pers	son Ide	ntificati	on
4. SOAIDEN Perso	n Sear	ch		

Direct Access (Go)– Used to access a form by its seven-character name.

Object Search – Used to search for a menu, form, job or QuickFlow with part of the name, description or type.

QuickFlow – Used to access a QuickFlow (see page X).

Select – Selects a field and enters the value into a form.

Rollback – Clears all information (except key information) and returns you to the first field in the key block. On query forms Rollback returns you to the first 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 – Exits from the form or window. In the main menu it exits from Banner. In queries it cancels the query.

Exit QuickFlow – Exits from a QuickFlow.

Exit SCT Banner – Exits Banner

Return to Menu - Returns you to the main menu

Preferences - Used to customize Banner.

List of recently accessed forms – Lets you quickly re-access the last 10 forms in the session.

Edit Menu

Cuț	<i>Cut</i> – Cuts selected text and places it on the clipboard.
⊆ору	Copy – Copies selected text to the clipboard.
Paste	
⊑dit	<i>Paste</i> – Pastes text from the clipboard to the spot where the cursor is located.

Edit – Used to enter or update text (particularly useful in long data fields).

Options Menu

 Course Co-Requisites

 Course Equivalents

 Course Fee Codes

 Course Degree Attributes

 Course Transfer Institutions

 Course Supplemental Data

 Course Description

 Course Text

Block Menu

Next	
Previous	
<u>C</u> lear	

Previous – Moves the cursor to the previous block. If the previous block is in another window, that window is opened.

Next – Moves the cursor to the next block. If the next area is in another window, that window is opened.

Clear – Clears all information from the current block (information is not removed from any records or tables).

Item Menu

	Previous – Moves the cursor to the previous field in the current block.
Previous	
Next	<i>Next</i> – Moves the cursor to the next enterable field in the current block.
<u>C</u> lear	Clear Clears all information from the current field (information is not
Duplicate	removed from any records or tables).

Duplicate – Duplicates the contents of a field and then copies it into a new record.

Record Menu

Previous
Next
Scroll <u>U</u> p
Scroll Down
<u>C</u> lear
Remove
Insert
Duplicate
Lock

Previous – Moves the cursor to the first enterable field in the previous record.

Next – Moves the cursor to the first enterable field in the next record of the current block. If the cursor is in the last record, a new record is created.

Scroll Up – Scrolls up a list of records.

Scroll Down – Scrolls down a list of records.

Clear – Clears all information from the current record (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.

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 Banner user can update it (depends on user's rights).

Query Menu

Enter
Execute
Last Criteria
<u>C</u> ancel
Count <u>H</u> its
Eetch Next Set

Help Menu

<u>O</u> nline Help
Dynamic Help <u>Q</u> uery
Dynamic Help ⊑dit
Help (Item Properties)
Show Keys
List
Display Error
Disalar ID Income
Display ID Imade
Display iD image Calendar
Display iD image Calendar Calculator
Display (D Image Calendar Calculator Extract Data with Key
Calendar Calendar Calculator Extract Data with Key Extract Data No Key
Display (D Image Calendar Qalculator Extract Data with Key Extract Data No Key Technical Support

About SCT Banner

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.

Online Help - Takes you to the SCT Banner Help Center

Dynamic Help Query – Displays a form in query mode which describes a field, block or form.

Dynamic Help Edit – Used to enter your own help notes for a field, block or form.

Help (Item Properties) – Displays the properties window for the current field.

Show Keys – Displays the Keys list which lists the functions and their keyboard equivalents in the current form, window and field.

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

Display Error – Displays the error code if an error occurs.

Display Image - If an image is available, displays the image associated with the ID.

Calendar – Displays the calendar.

Calculator – Displays the calculator.

Extract Data with key - Export data to excel with the header block information

Extract Data with no key – Export data to excel without the header block information

About SCT Banner – Displays the form which identifies the current form, release number, date and time.

Toolbars

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

• The horizontal toolbar shown below appears directly under the menu bar.

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

The following iconic buttons are available on the horizontal toolbar:



Title Bar

🖗 General Person Id

The title bar shows the following information:

ATREN 8.0 (PROD)

- Descriptive form name
- Seven-character form name
- Release number
- Database name

descriptive form name	seven-character form name

release number _____

database name



Navigation Tabs

The navigation tabs are a way to navigate through forms. It is located near the top of the form.



Other Navigational Tools

Current Identification Alternate Identificat

You can easily move through the different pages by right clicking on the canvas. This is also useful to get commonly used functions like Rollback, Save, Exit, and Print. This is also an easy way to add a form to your Personal Menu

Auto Hint

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

R	ollback
Sa	ave
E	×it
Ē	rint
8	dd to Personal Menu
⊆	urrent Identification
۵	ternate Identification
A	ddress
Ţε	elephone
₿i	ographical
Ē∙	-mail
Ē	mergency Contact
A	ppointments and Contacts [SOAAPPT]
S١	ystem Data Summary [GUASYST]
Ċ	ommon Matching [GOAMTCH]

< × <

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

	Current identification number; overtype to change; DUP REC for Source Info.	——— Auto hint
Status line ——	Record: 1/1	

Status Line



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 window the total appears as a question mark, e.g. 3/? until you scroll to the last record in the block.
- **List of Values** Indicates the field has a List of Values.
- **Enter Query** Indicates the form is in query mode.

Key Block

The first block on most forms contains key information. All information on the form refers to the key block. Key block information is typically the ID Number, term, course, etc. The key block stays on the form as subsequent blocks appear.

When the cursor is in the key block you can enter information in the fields in the key block area. When you leave the key block the fields are disabled (dimmed).

Other Blocks

Other blocks contain additional details for the key information. Each block contains related information.

Types of Forms



Application forms

Application forms are used to enter, update and query information in Banner. This is the most common type of form.

실 PROD Banner8: Open > SGASTDN	
Eile Edit Options Block Item Record Query Tools Help	
🔲 🖉 I 🔔 I 🖉 😭 😭 😭 😭 🔜 🕒 I 📇 I 😒	🖻 与 掃 ᡧ ⊕ ❷ ❷ X
general Student SGASTDN 8.1.1 (PROD) 000000000000000000000000000000000000	
ID: Student S	Summary 💌 Term: 💌 🛛 View Current/Active Curricula
Learner Curricula Activities Veteran Comm	nents Academic and Graduation Status, Dual Degree Miscellaneous
General Learner	
New Term:	From Term: To Term:
Student Status:	Additional Information
Residence:	Site:
Fee Assessment Rate:	Session:
Class:	Block:
Full or Part Time: OFull Time OPart Time None	Citizenship:
Curricula Summary Student Type: PriorityTerm Program Catalog Level	Rate: Campus College Degree
End: Outcome Key: Admission Type:	Admission: Matriculation:
Field of Study Summary Priority Term Type Field of Study	Department Attached to Major 🗐
	Ê la la companya di serie di s
 dentification_number_proce_LIST_for_nomedID_coarch_form: DUDU_CATE_ITEM_for_alte	amata ID laak un: HELP for cummany
Record: 1/1	emate to took-up, HELF for summary.

The General Student Form is an example for an application form.

Query Forms

Query forms are used to look up existing information, often returning information to the calling form. You must access a query form from another form. You CANNOT access it directly from the main menu. The Registration Section Query Form is an example.

Appendix PROD Banner8: Open > SFAREGQ		
Eile Edit Options Block Item Recor	rd Query <u>T</u> ools <u>H</u> elp	
🔲 🖉 🗎 i 🖊 🖬 🖨 i 🎓 i	🖥 🚱 📾 💁 📇 💽 📧 🖆 🖆 🌵 🌵 🌚 🕤 X	
🙀 Registration Query SFAREGQ 8.0 ((PROD)	eeeeeee ≚×Ì
Term: 🔽	Registration From Date: 📰 Registration To Date: 📰	
Term CRN Subject Part of Term: Grading Mode: Credit Hours:	Registration Begin Course Status CEU Cross List Mon Tue Wed Thu Fri Sat Sun Time Campus: Start Date: Instructional Method: Instructor: Primary Room: Instructor: Primary	End Time
Part of Term: Grading Mode: Credit Hours:	Campus: Start Date: Instructional Method: Building: End Date: Primary	
Part of Term: Grading Mode: Credit Hours:	Campus: Start Date: Instructional Method: Building: End Date: Primary	· · ·
Co-op Education:	Total Credit Hours: Total CEU Hours:	
Term Code; press LIST for valid codes. Record: 1/1	List of Valu «OSC»	

Inquiry Forms

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 Go To or with Object Search.

🚣 PROD	Banner8: ()pen > 501	SBGI				
Eile Ed	it <u>O</u> ption:	s <u>B</u> lock	Item <u>R</u> ec	ord Query <u>T</u> o	ols Help		
🔒 🅜) 🖹 (🖌	- 🖻	5 🕞 🔁	ı 🥻 i 😵 📾	🛞 [💁 [📇 [🔍 🕒]	`₽₽₽ 4 0 2 X	
🖗 Sour	ce/Backgro	ound Inst	itution Qu	ery-Only SOIS	BGI 8.0 (PROD) SSSSSS		× ≥ 200000000000000000000000000000000000
Sou	ce or B	ackarou	ind The	titution			
oou	CC OF D	ackgrot	110 1113	atadon			State or Admission
HS	College	Source	None	Code	Name	City	Province Request Code
ŏ	ě	ŏ	ě				
ő	ő	ő	õ				
0	õ	0	0				
0	0	0	0				
0	0	0	•				
0	0	0	0				
0	0	0	0				
0	•	0	•				
0	0	0	0				
0	•	0	•				
0	0	0	•				
0	•	0	0				
0	•	0	•				
0	0	0	0				
0	•	0	0				
0	0	0	0				
0	2						
0	0	0	0				
0	0	0	•				
Enter a	query; pres	s F8 to exe	cute, Ctrl+	Q to cancel.			
Record:	1/1		Enter-Qu		<08C>		

Elements on a form

The following figure shows various elements that appear on forms in Banner.

Iconic	General Message	B GUAMESG 8	.0 (PROD) 200			000000000000	000000000	 	2 <u>2</u>
buttons	Recipient: Message: Reference ID:				Sender:		Date: Source: Item:	Time:	4
Radio	System:	Complete	• Pending	Hold	Confidential				
builons	Recipient: Message: Reference ID: System:				Sender:		Date: [Source: [Item: [Time:	
elds	Recipient: Message: Reference ID	Complete	○ Pending	○ Hold	Confidential		Date: [Source: [Item: [Time:	
Check box	System:	Complete	O Pending	© Hold	Confidential				
Record —	Recipient: Message: Reference ID: System:	Complete	♥ Pending	○ Hold	Sender:		Date: [Source: [Item: [Time:	•
	FRM-40350: Query ca	aused no record:	s to be retrieved.		<08C>				1

Buttons

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

Iconic Buttons

These buttons are small squares that contain an icon (picture). They represent one or more actions that can be performed for an associated field or record. Michigan Tech uses the following iconic buttons.

-	Search	Displays another form or window where you can search for information.
Ø	Data	Indicates that data is available for the associated field.
	Calendar	Displays a calendar for choosing a date.

Response Buttons

These buttons are shaded rectangles that appear in alert boxes and dialogue boxes.



Checkboxes



Checkboxes are small boxes used to enable or disable features or options. When an option is enabled a check mark appears in the checkbox. When the option is disabled the checkbox is empty.

Radio Buttons



Radio buttons are small circles used to select one of several options in a group. You can pick only one radio button in a group.

Records, Rows, and Columns

Records are sets of related fields, e.g. an address record.



If a block has multiple fields the records often appear in rows and columns. A horizontal scroll bar appears under the columns if all columns don't fit into the window at once. A vertical scroll bar appears on the right side of the rows if all rows don't fit into the window at once.

An example of a form showing records, rows and columns is shown below:

<u>@ PROD Banner8: Open > SOAIDEN</u> □ □ × Eile Edit Options Block Item Record Query Tools Help <u>□</u> □ × □ □ × <u>□</u> □ × □ □ × <u>□</u> □ ×				
ID	ALDEN B.U (PROD) Information	First Name	Middle Name	Change Birth Date Indicator Type
M00232778 Image: Case Insensition	Husky	Blizzard Image: Strate Strat	T Image: Constraint of the sector of the	
Identification Number; Record: 1/1	press COUNT QUERY HITS to access addition	nal information. <0SC>		

Fields



A field in Banner is sometimes called an item, e.g. Next Item, Previous Item and Duplicate Item.

Fields are areas on a form where you can enter, query, change and display information.

Enabled	You can put the cursor in the field. Information in the field appears in	
	black text.	
Example:		
ID:	000000000 Blizzard T Husky	
Disabled	You cannot put the cursor in the field. Information (if it exists) appears	
	in grey text.	
Example:		
ID: 00000000 (Blizzard T Husky)		
Enterable	You can enter information in the field.	
Example:		
ID:		
Display only	You cannot enter information in the field.	
Example: ID:	00000000 Blizzard T Husky	

Validated Fields

Many fields only accept codes from a defined List of Values (LOV) and you can tell that a field has predefined values if the field name appears in blue. The code/description lookup feature helps you enter information into validated fields. This feature will enable you to

- Enter a complete code or description
- Look up a code/description based on a partial entry
- Display the entire LOV and select a code.



Navigating through Banner

Main menu	You can select from a list of the menus, forms and QuickFlows in Banner.
Go To	You can access a menu, form or QuickFlow by its seven-character name, you can use the code/description lookup feature, or arrow up or down to access forms used in this session.
Object Search *further details below	You can access a form or QuickFlow if you know part of its name, description or type.
Right Click on Canvas	You can access other blocks of information or commonly used functions
Iconic buttons	You can access another form or window related to the current record or field.
Mouse	You can click an iconic button, field, record, block or window that is currently displayed.
Keyboard equivalents	You can use the keyboard to access a form, window, block or field.
QuickFlow	You can automatically access forms that are linked in a chain.
Last 10 forms in the File pull- down menu	You can quickly re-access a form that was previously opened in the current session.

Banner provides several ways to navigate through the system:

Object Search

You can use Object Search to access a form, job or QuickFlow if you know part of its name, description, or type.

1. Double-click the **Go To** field on the Main Menu.

2.	Type in your search criteria on the Object Search Form. You can use the % wildcard in any field.	Object Search GUIOBJS 8.0 Name Stude Comparison	(PROD) >>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>
3.	Perform a Query function: A list of all matches appears.	🙀 Object Search GUIOBJ9 Name	8.0 (PROD) 000000000000000000000000000000000000
or	$\frac{1}{1000} Mouse ^{\text{T}}$	RPRVABN SYGOR0033U SYHOR0020	Students Reporting VA Benefits on FAFSA Students with Address Holds Students without Deans List Indicator
	Keyboard F8 key	TVRCRED TYSOR014	Students with Title IV Credit Report Students with UAS Balance
4.	Scroll to the desired name.		

5. Double-click the desired name or click the Start button.

Searching in Banner

Banner forms have ID fields for students (persons). You can always enter the complete ID in an ID field if you know the person's ID number as instructed below, or you can use the ID/name search feature on the current form.

Before following the procedures below access the Banner Form from which you want to look up information (e.g. SPAIDEN, TSAAREV)

Entering a complete ID:

- 1. Perform a Clear Record if any details are in the key block:

 Mouse <</td>
 ⊕

 Record > Clear
 Shift+F4
- 2. In the **ID** field type in the full ID, e.g. 234567891.
- 3. Press <Enter>. The ID and name will automatically appear in the key block.

Entering a complete name:

1. Perform a Clear Record if any details are in the key block: Mouse ↔ Keyboard

<u>Record</u> > <u>Clear</u>	Shift+F4

- 2. <Tab> to the **Name** field which is the unlabelled field next to the ID field.
- 3. Type in the name, separating the surname and first name/other names with a comma. *You can type in upper or lower case and you don't have to leave a space after the comma.*

Examples: Smith, Robert, James smith, robert, james

- 4. Press <Enter>.
 - ➢ If one name is found, the ID and name will automatically appear on the form.
 △ If more then one person with that name is found, the ID and Name Extended

See page 23 for details on the ID and Name Extended Search window

If more than one person with that name is found, the ID and Name Extended	
Search window will be displayed (shown below) with a list of persons with the	at
name.	
${igodia}$ ID and Name Extended Search (2000000000000000000000000000000000000	

Results:		Person/	Non-Person Count:	2
Person Search Detail:	 	Non-Person Sea	rch Detail:	
	Reduce Search I	3y		
O Person	○ Non-Person	(🖲 Both	
Enter search criteria the	n press Execute Query or so	elect button to red	uce search.	
City:		SSN/SIN/TIN:		
State or Province:		Birth Date:		
ZIP or Postal Code:		Gender:		
Name Type:				
Press Enter Query or sel	ect button to clear search.			

Using 'wildcards' in searches



Wildcards, or Oracle wildcards as they are referred to in Banner, are characters that will match any character or combination of characters. Wildcards are used in partial ID and name searches as shown below.

The wildcard characters used in Banner are:

% (percent key)	representing any number of unspecified characters.
_(underscore key)	representing one occurrence of an unspecified character. (SOAIDEN
	form only)

Examples

smith, s% sm%, s%	searches for all persons with the surname <i>Smith</i> whose first name starts with <i>S</i> . searches for all persons whose surname starts with <i>Sm</i> and whose first name starts with <i>S</i> .	
, Sara%	searches for all persons with the letters Sara in the first name.	
%,Sarah%	searches for all persons with the first name Sarah.	
%th	searches for all entries that have <i>th</i> as the last two characters.	
%mi%	searches for all entries that contain the letters <i>mi</i> .	
%	searches and displays every record on the current form in the ID and Name	
	Extended Search window (i.e. thousands of entries! - useful if you don't know	
	the ID/name but have other information such as a date of birth to narrow	
	search).	
21%	searches for all IDs that start with 21.	
_m%	searches for all entries that have <i>m</i> as the second character (Note! Search only	
	available in the Person Search Form – SOAIDEN – see page 7).	

Searching by partial ID:

- 1. Type in a partial **ID** in the ID field using a wildcard, e.g. 21%.
- 2. Press <Enter>.
 - > If one match is found, the ID and name will automatically appear on the form.
 - If more than one match is found, the ID and Name Extended Search window will be displayed with a list of matches to choose from. The field next to the Search Results field will show the number of matches.
 - If you are in SPAIDEN, this search will take you to the common matching entry form GOAMTCH

Searching by partial name:

- 1. Make sure the **ID** field is blank (if not, press the <Delete> key to remove ID).
- 2. <Tab> to the **Name** field which is the unlabelled field next to ID field.
- 3. Type in a partial name in the **Name** field using a wildcard(s) (see section above on 'Using Wildcards'.
- 4. Press <Enter>.
 - > If one match is found, the ID and name will automatically appear on the form.
 - If more than one match is found, the ID and Name Extended Search window will be displayed with a list of matches to choose from. The field next to the Search Results field will show the number of matches.



THE ID AND NAME EXTENDED SEARCH WINDOW 🙀 ID and Name Extended Search 🔅 Click the arrow to **Results:** Person/Non-Person Count see the list of Button to go results into the Person Person Search Detail: 🗌 🚞 Non-Person Search Detail: Search Form **Reduce Search By** Radio buttons 🔿 Person ONON-Person 🖲 Both to identify the kind of search Enter search criteria then press Execute Query or select button to reduce search. Search criteria City: SSN/SIN/TIN: - to narrow State or Province: • Birth Date: searches ZIP or Postal Code: • Gender: Name Type: • 5 1 Press Enter Query or select button to clear search. 🙀 ID and Name Extended Search ▼ /Non-Person Count: **Results:** 2 Andrew Paul 234567891 Roberts, Paula Catherine 23456789 arch Detail: 🛛 😂 Person ich De Stephens, Paula Catherine 2345E phens, Alan John 2345 Stephens, Alan John, 234567 🖲 Both O Person tephens, Claire 23456 8499 Stephens, Charles Graham 238979827 Stephens, Charles 238979827 Enter search criteri educe search. Sarah Victoria 238472045 9876544 City: Previous names and ate or Province: • Birt IDs are indented Scroll to the or Postal Code: • Gen under the current desired name • me Type: and ID and name and ID

Tips

×

To cancel the query, click on the cancel button.

Press Enter Query or select button to clear search.

To clear the criteria from the **Reduce Search By** block, click on the rollback button.

click – the name will be

returned to

the form

6

2

Narrowing (reducing) searches:

- 1. Click on the Person, Non-Person, or Both radio button in the **Reduce Search By** block in the **ID and Name Extended Search** window (to identify the kind of ID you want to search).
- 2. Type in the search criteria in the fields in the **Reduce Search By** block, eg a date of birth (see section on data format for entering dates).

- 3. Click on the Reduce Search icon 🔍 and then the arrow icon 💌 in the search results field to see the matches.
- 4. If necessary, go back to step 2 to further reduce the search.

PERSON SEARCH FORM (SOAIDEN)

Search forms are also available in Banner to search for a person or non-person by name or ID. However, the recommended and preferred way of searching in Banner is on pages 22 and 23.



- 1. Click on the Person Search Detail button [▼] either in the ID and Name Extended Search window or in the key block of a form to display the Person Search form (e.g. SPAIDEN, TSAAREV)
- 2. If there is more than one search option, e.g. Person or Non-Person, an **Option List** will appear. Click on the option you want to search on.
- 3. <Tab> to Last Name field and type in the surname and/or use a wildcard, e.g. Ste%.
- 4. Perform a query function. The form will show all IDs with matching information. Mouse ⊕ Keyboard
 or Query > Execute Function key F8
- 5. <Double-click> the desired ID. The ID and name will return to the form.

PERSON SEARCH DETAIL FORM (SOAIDNS)

The Person Search Detail form is useful for searching and displaying address information, IDs, date of births and details on the student's program information. This form is display only.

Accessing the Form

[SOAIDNS]

1. Type in the information that you know in the appropriate field, e.g. Last Name



Go:

The fields in this form are case sensitive.

Perform a Query function. The form will show all matching information.
 Mouse [∧][⊕] Keyboard [∞]



Using 'Sounds Like' searches

A 'sounds like' search, or Oracle Soundex search as it is referred to in Banner, can be used if you do not know the ID number or name but think you know what it sounds like; or perhaps you think the name could be one of a few possibilities, e.g. White, Waite or Wyatt. A 'sounds like' search can be used to narrow the search results. You can enter as much or as little of the name as you know, using upper, lower or mixed case. As long as the first letter is correct the search will retrieve names with a similar pattern of characters.

- 1. Click on the Search button next to the **Name** field on the form.
- 2. From the **Option List** click on <u>Person</u> on <u>Non-Person Search</u>.
- 3. Click on the Exit button in Cancel Query function button is to activate the **Options menu**.
- 4. Click on <u>Search Using 'Sounds Like'</u> option. The **Soundex Search** window will appear.
- 5. Type in the name you think it sounds like or a string of characters for the name you want to find, e.g. White, Smth etc.
- 6. Perform a query function:

Mouse 🕀	Keyboard 🚈
or <u>Query</u> > <u>Execute</u>	Function key F8

The search form shows all IDs for names that could match with the sounds like name/characters.

7. <Double-click> the desired ID. The ID and name will be returned to the form.

First Name:

Sounds Like...Last Name: 📗

Using the Calendar

You can click the calendar icon in next to any date field to display the calendar. The calendar highlights the current date. You can double-click a date on the calendar to return it to the calling form. You can access the calendar by typing GUACALN in the Go To field or choosing it in the Help menu. When accessed this way the calendar works independently of any form or field. You cannot select a date and return it to a form.



Double-click any date on the calendar to return it to the **Date** field on the form.

Using the Calculator

You can double-click any updatable 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 to make calculations. When you are done click the OK button to return the calculated value to the calling form.

You can also access the calculator by typing GUACALC in the Go To field or choosing it in the Help menu. However, when accessed this way the calculator works independently of any form or field and you cannot return the calculation to a form.



Using Help

Banner has several kinds of help that can give you assistance.

In the Help menu:

Online Help	Available for each system.
Dynamic Help	This is used to show the database field for a field on the form and in some cases a field description.
Banner Bookshelf	This tool lets you access Banner documents provided by Sungard SCT directly from your computer. This is generic material and users should refer to their user manuals for documentation specific to Michigan Tech.

At the bottom of the form:

Auto Hint This hint at the bottom of the form briefly describes the field where the cursor is located. Error and processing messages also appear here



My Banner

My Banner includes the forms, jobs, menus and Quick Flows that are most important in your daily work. You can access My Banner from the Main Menu. It's tied to your Oracle user ID.

You can use these forms to create and copy personal menus:

• The My Banner Maintenance Form (GUAPMNU) lets you create and change you're My Banner. The user ID associated with the person logged on to the system is shown above the left panel.

🖀 PROD Banner8: Open > GUAPMNU						
Ele Edit Options Block Item Becord Query Tools Help						
(日の)] (2) (2) (2) (2) (2) (2) (2) (2) (2) (2)						
🙀 My Banner Maintenance - GUAPMNU - 8.0 (PROD) - 500000000000000000000000000000000000						
KEGIDDIN'S Personal Menu						
Type: Oracle Forms module	Object	Description				
	SGASTDN	General Student Form	A			
Object Description	SPAPERS	General Person Form				
ISA1098 1098-1 Tax Information	SFAREGS	Student Course Registration Form				
FTMITYP 1099 Income Type Code Maintenance	SFASRPO	Student Registration Permit-Override Form				
FAA1099 1099 Reporting	SPAIDEN	General Person Identification Form				
FOA1099 1099-MISC Magnetic Tape Transmitter D	SLAEVNT	Event Form				
PXA1099 1099-R	SZADEGQ	Degrees Awarded Query Form				
PTV1099 1099-R Distribution Code Validation	Incort	Course Summary Form				
AZA12QT 12 Qtr Rolling Average Form		Student Registration Group Form				
RNRGLBL 1999-2000 INAS Global Policy Options Ri	-	Ident Registration Permit-Override Form				
RNAOV05 2004-2005 Applicant Override	Remove	n Oracle Report	1			
RNRGL05 2004-2005 INAS Insert All	SZBEMTX	MTU Email Text Form (Prereqs and Others)	2			
	SZAEXCP	DARS Student Exceptions				
RNANA05 2004-2005 Ne Remove All	SGASADD	Additional Student Information	2			
RNAVR05 2004-2005 Need Analysis Document Veri						
RNAPROS 2004-2005 Need Analysis Processing						
READIOS 2004-2005 Pell Disbursement/Acknowled						
REAORDS 2004-2005 Pell Origination/Acknowledge						
RNASL05 2004-2005 Student Loan Data						
RNASU05 2004-2005 Supplemental Need Analysis						
RNAOV06 2005-2006 Applicant Override						
RNRGL06 2005-2006 INAS Global Policy Options R						
RNIMS06 2005-2006 Miscellaneous Results Inquiry			-			
Enter Object Name: Listin Search						
Record: 1/14 <08C>						

The Menu Maintenance form where you add/delete objects from My Banner.

Adding an object to My Banner

- 1. Access the My Banner Maintenance Form by typing *GUAPMNU* in the **Go To** field.
- 2. Use the pull-down list above the left pane to select the object type you want to display. The left pane lists the objects of the selected type that can be added to the menu.
- 3. In the left pane, select (highlight) each object you want to add to the menu by doubleclicking on the object's name.
- 4. Repeat steps 2 and 3 for each object type you want to add to the menu
- 5. Click in the right pane where you want to place the new menu items.
- 6. Click the Insert button in the middle of the form. The selected objects are added to the right pane below the place where you clicked.
- 7. Save the records:

Mouse 🗇	Keyboard 🚈
	F10 function key

You can customize the object description by overtyping the name as shown below:

Object	Description
SPAIDEN	You can customize the description
FURFEED	Finance Feed Sweep Process gathers transactions from GURFEED and inserts them i
FGRTRNI	Interface Process

Deleting an object from My Banner

- 1. Access the My Banner Maintenance Form by typing *GUAPMNU* in the **Go To** field.
- 2. In the right pane select the object(s) you want to delete by double-clicking on the name so it is highlighted.
- 3. Click the Remove button 🔄 in the middle of the form to delete the object. If you want to remove all of the objects click on the Delete All button 🝕.
- 4. <u>Save</u> the records:

Mouse 🗇	Keyboard 🚎
	F10 function key

Adding an object if you know the object's seven-character name

- 1. Access the My Banner Maintenance Form by typing *GUAPMNU* in the **Go To** field.
- 2. Place the cursor in a blank **Object** field in the right pane.
- 3. Type in the object's seven-character name, e.g. SPAIDEN.
- 4. Press <Enter>. The object's name and description appear in the right pane.
- 5. <u>Save</u> the records:

Keyboard َ

or <u>File</u> > <u>Save</u>

Mouse 1

F10 function key

Appendix 1: Quick Reference Chart

