A Guide to Using Banner

Contents

Format Conventions

On-screen information appears in bold	**E: Error!**
Commands and options you select are <u>underlined</u>	<u>Save</u>
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>

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

Type in the details as follows:

Username: *kegiddin*   Tab

Password: *********   Enter
↵

Click on Connect or press <Enter>

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:

Banner Main Menu

There will be a second window that must remain open while your Banner session is open.
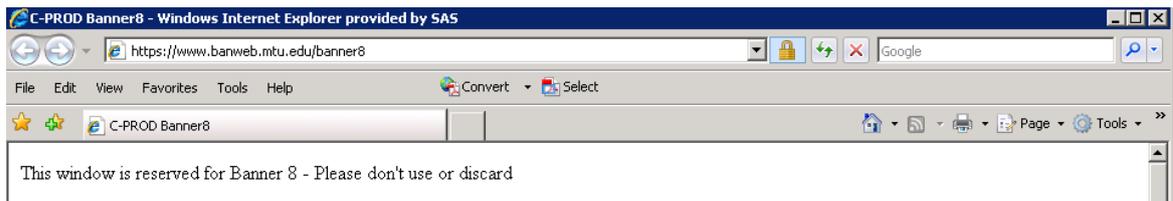
Exiting Banner
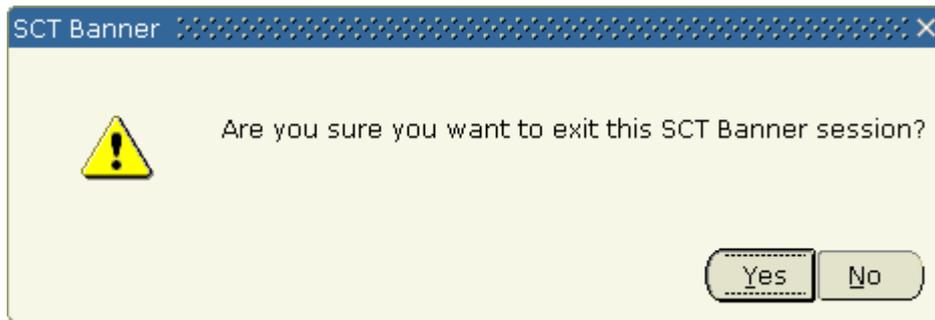
There are several ways to quit/close Banner as shown below. Choose one of these options from the Main Menu.

        Click the Exit button on the horizontal toolbar.

Ctrl+q   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.

File>Exit   Click on File>Exit in the menu bar

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

       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.

To display keyboard equivalents available in the current form, window and field:

Mouse

or
Help > Show Keys

Keyboard

CTRL+F1 function key

Function	Key
Clear Field	Ctrl+U
Count Query Hits	Shift+F2
Display Error	Shift+F1
Down	Ctrl+L
Down	Down
Enter Query	F7
Execute Query	F8
Exit	Ctrl+Q
Function 2	Shift+Ctrl+F2

Keys

OK

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.

collapsed menu

expanded menu

The currently selected menu is highlighted.

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.

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 the form in the Go To field.

Go To... [   ] [▼]

2. Press <Enter>.

OR

Main menu
Select the form from the menu list in Banner.
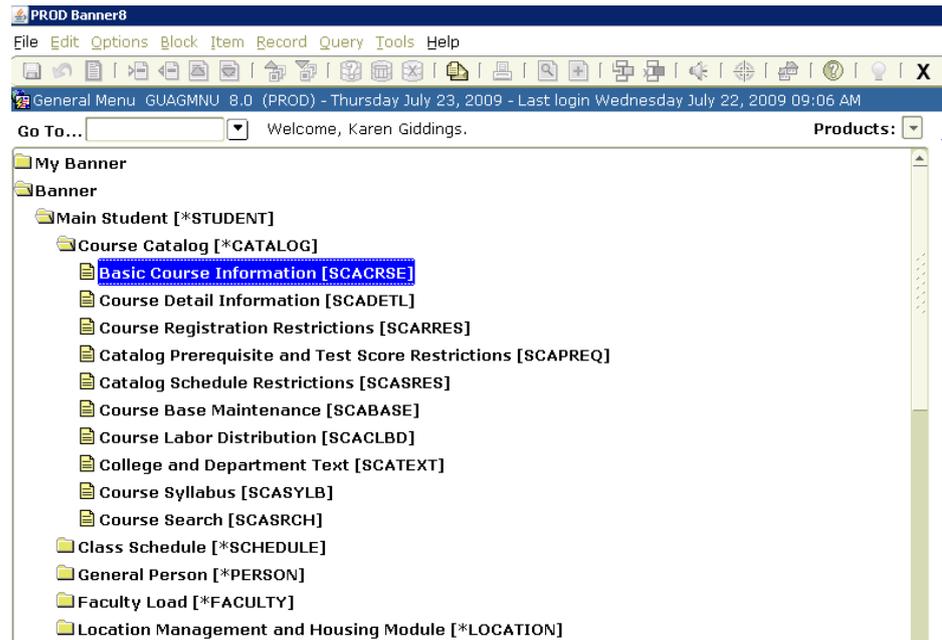
OR

File pull-down menu
You can re-access the last 10 forms that were previously opened in the current session.

1. Click on the File pull-down menu.
2. Select the form.

OR

Keystrokes
1. You can press F5. Enter the Form name in the Go To field.
2. Press <Enter>

OR

1. Arrow up or down in the Go To field to access forms used during this session.
2. Press <enter> when the form you want appears in the Go To field

OR

1. Click on the File pull-down menu
2. Click on Direct Access
3. Type the seven character name of the 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.
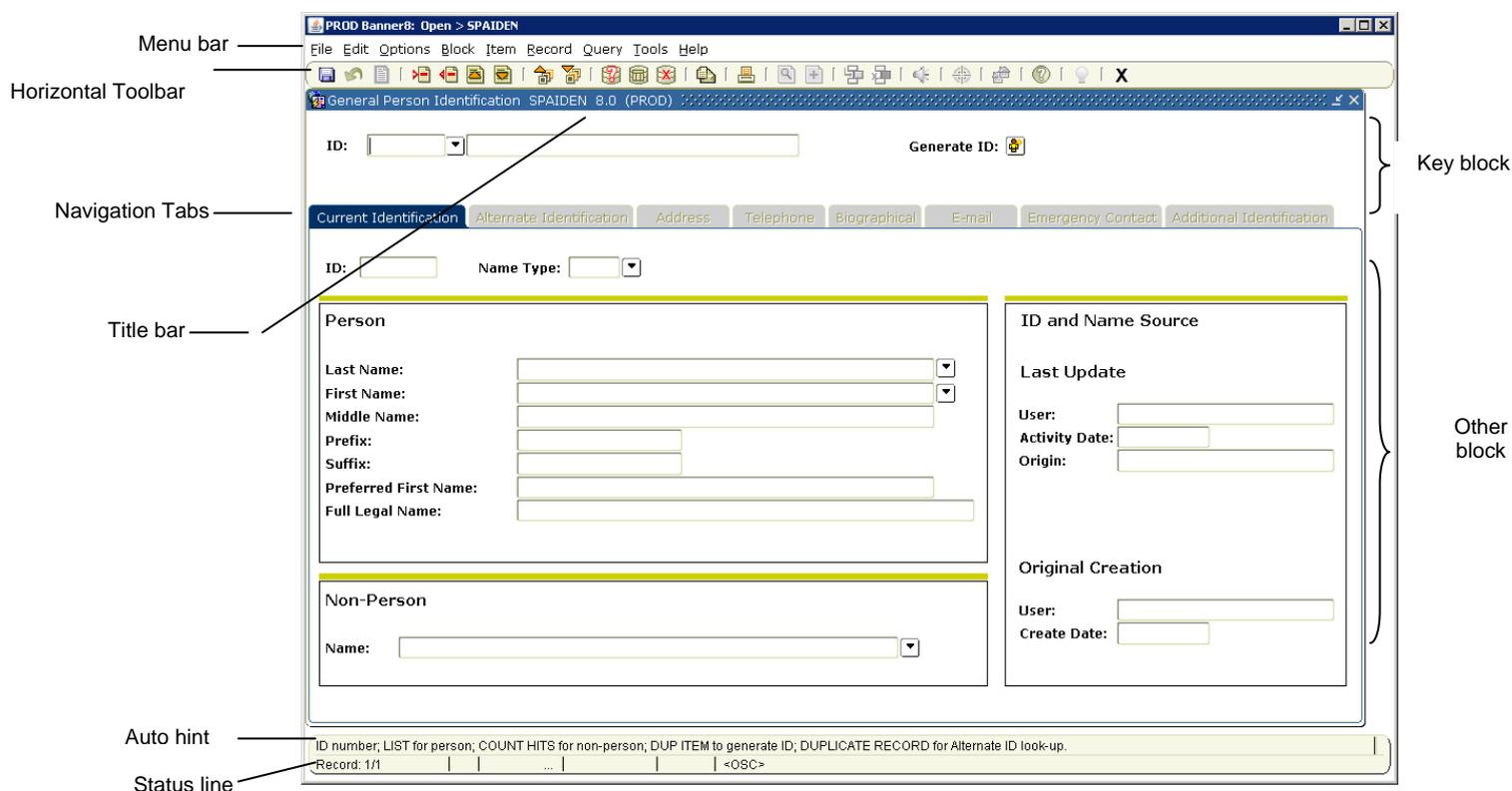
Menu Bar

The Banner menu bar, located at the top of every form, contains pull-down menus.

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
Rollback
Save
Refresh
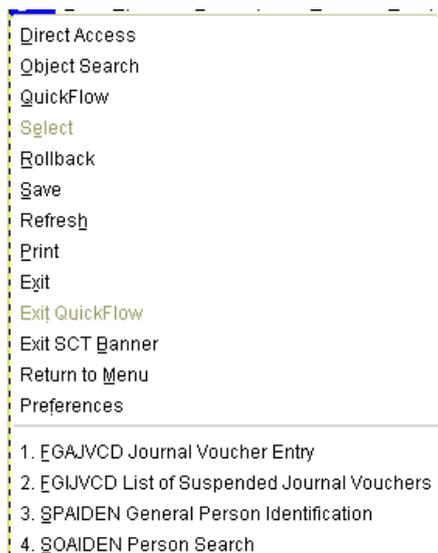Print
Exit
Exit QuickFlow
Exit SCT Banner
Return to Menu
Preferences

1. FGAJVCD Journal Voucher Entry
2. FGIJVCD List of Suspended Journal Vouchers
3. SPAIDEN General Person Identification
4. SOAIDEN Person Search

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.
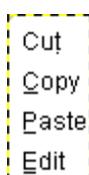
Exit QuickFlow – Exits from a QuickFlow.

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

Cut
Copy
Paste
Edit

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 – 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

Items under the Options Menu will take you to blocks within a form or outside the form to a related form. This menu changes with each form.
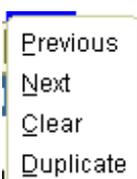
Block Menu
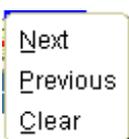
Previous – Moves the cursor to the previous block. If the previous block is in another window, that window is opened.

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.

Next – Moves the cursor to the next enterable field in the current block.

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

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

Record Menu

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
Cancel
Count Hits
Fetch Next Set
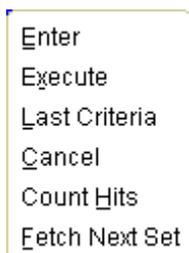
Enter – Puts the form into query mode so you can enter search criteria to see what information is already in the database.

Execute – Searches the database and displays the first set of records that match your search criteria.
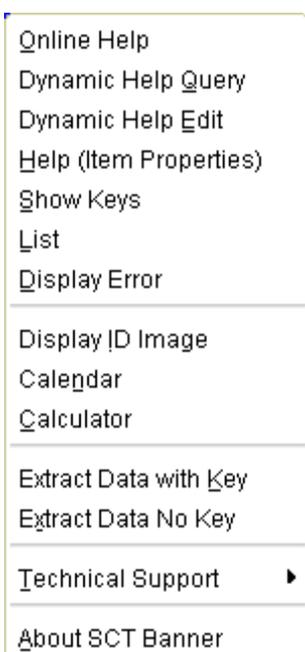
Last Criteria – Enters the criteria from your last search (enabled only when you are in query mode).

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

Online Help
Dynamic Help Query
Dynamic Help Edit
Help (Item Properties)
Show Keys
List
Display Error

Display ID Image
Calendar
Calculator

Extract Data with Key
Extract Data No Key

Technical Support ▶

About SCT Banner

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:
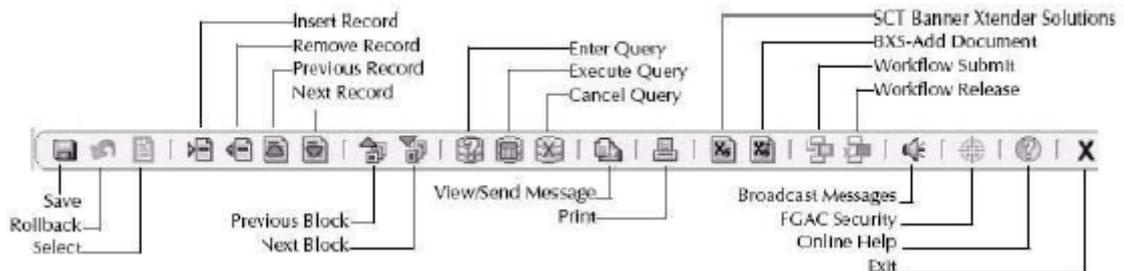
Title Bar

The title bar shows the following information:
- Descriptive form name
- Seven-character form name
- Release number
- Database name

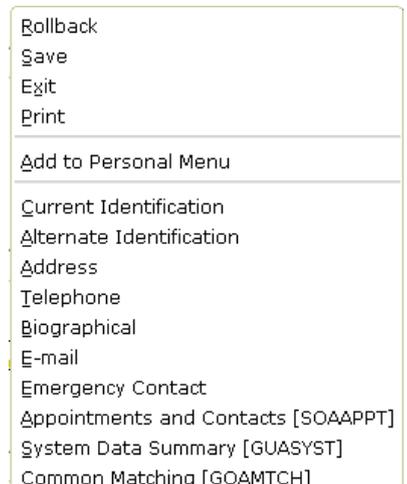descriptive form name   seven-character form name

General Person Identification SPAIDEN 8.0 (PROD)

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.

| Current Identification | Alternate Identification | Address | Telephone | Biographical | E-mail | Emergency Contact |

Other Navigational Tools

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

Rollback
Save
Exit
Print

Add to Personal Menu

Current Identification
Alternate Identification
Address
Telephone
Biographical
E-mail
Emergency Contact
Appointments and Contacts [SOAAPPT]
System Data Summary [GUASYST]
Common Matching [GOAMTCH]

Auto Hint

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.

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.

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.
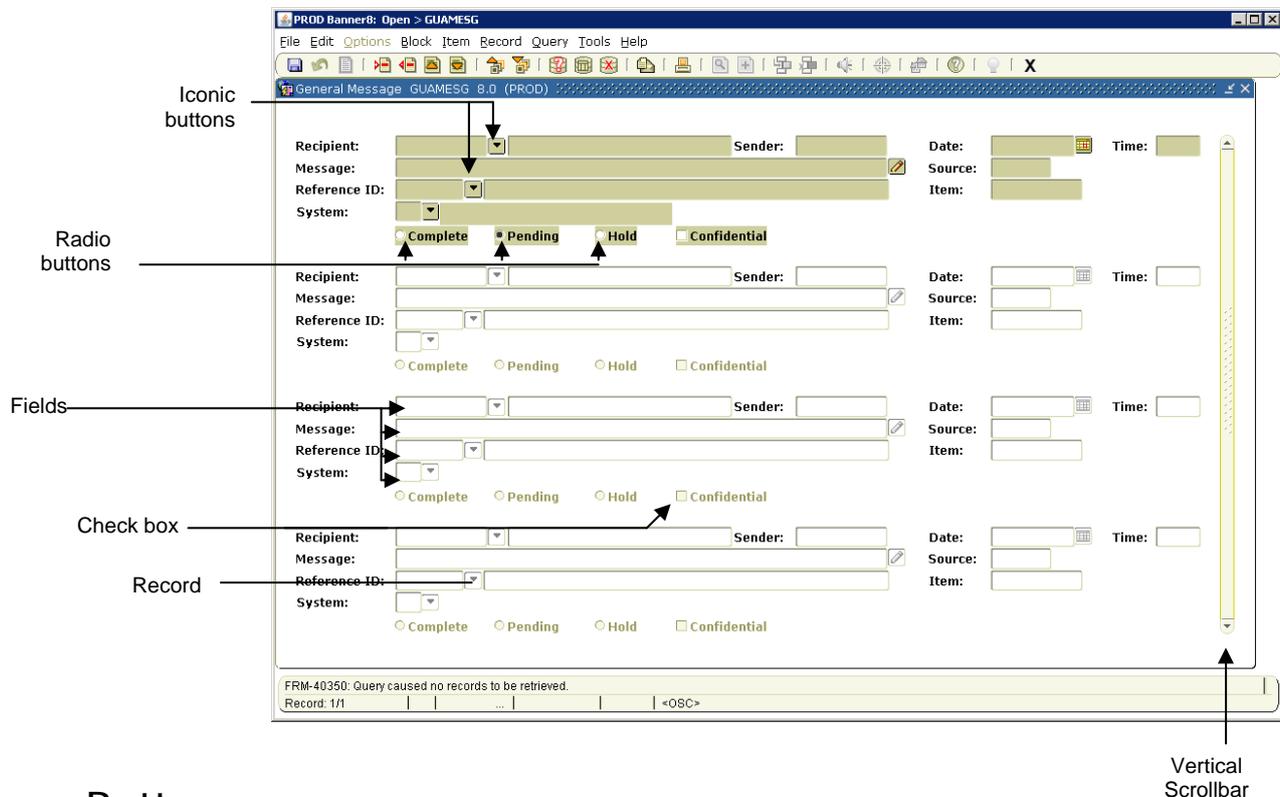

Inquiry Forms

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.

Elements on a form

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

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.
	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:

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: 000000000 Blizzard T Husky
Enterable	You can enter information in the field.
Example:	ID:
Display only	You cannot enter information in the field.
Example:	ID: 000000000 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.

Click on the arrow icon or press function key F9 to display the entire LOV for a field
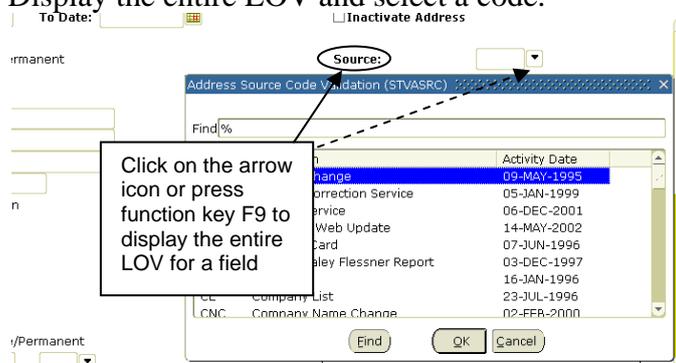
Navigating through Banner

Banner provides several ways to navigate through the system:

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.

Object Search

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

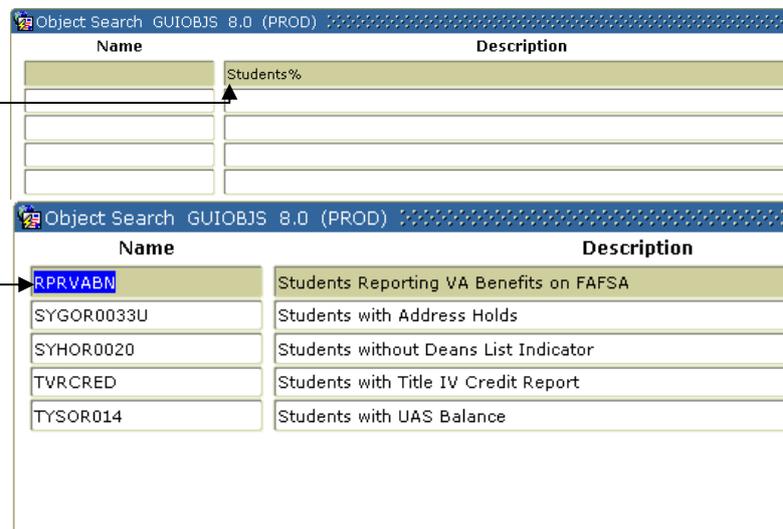1. Double-click the **Go To** field on the Main Menu.

2. Type in your search criteria on the Object Search Form.
   You can use the % wildcard in any field.

3. Perform a Query function: A list of all matches appears.

   Mouse 🖱
   or <u>Query</u> > <u>Execute</u>

   Keyboard ⌨
   F8 key

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 🖱   **Keyboard** ⌨
    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** ⌨
    Record > Clear   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 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 that name.

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)*

<u>Examples</u>

smith, s%	searches for all persons with the surname ***Smith*** whose first name starts with ***S***.
sm%, s%	searches for all persons whose surname starts with ***Sm*** and whose first name starts with ***S***.
, 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 ***th*** as the last two characters.
%mi%	searches for all entries that contain the letters ***mi***.
%	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 ***m*** 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

Button to go into the Person Search Form

Radio buttons to identify the kind of search

Search criteria – to narrow searches

Click the arrow to see the list of results

1

Previous names and IDs are indented under the current name and ID

Scroll to the desired name and ID and click – the name will be returned to the form

2

Tips

 ☒ To cancel the query, click on the cancel button.

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

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 this button

2. An Option List appears if there is more than one search option

4. Run (execute) a query (or press F8 key)

3. Type in the search criteria, using wildcards if necessary

5. The form shows all matching information. Scroll to desired ID and double-click to return the ID/name to the form

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

Go: [SOAIDNS]

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

   The fields in this form are case sensitive.

2. Perform a Query function. The form will show all matching information.
   Mouse 🖱   **Keyboard** ⌨
   🗑 *or* Query > Execute   F8 function key

2. Press F8 function key or 🗑 Execute Query button

1. Type in the search criteria

ID	Last Name	First Name	Middle Name	Birth Date	Sex	Change Indicator
	Husky					

3. Matching information will be displayed

Address information for the selected student (highlighted in blue in first block)

Use the scroll bars to move between records

Information in this block is coming from other modules in Banner

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 Person on Non-Person Search.

3. Click on the Exit button **X** or Cancel Query function button 🔲 to activate the **Options menu**.

4. Click on Search Using 'Sounds Like' 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* Query > Execute   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.
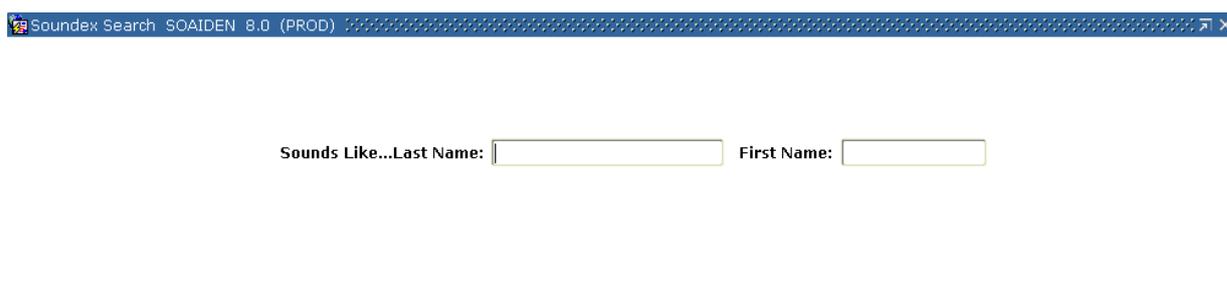
Using the Calendar

You can click the calendar icon 📅 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.
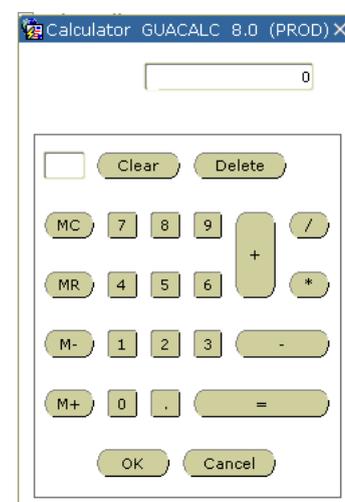
Using Help

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

```
┌─────────────────┐
│ Field description │
└─────────────────┘
```

```
Address type; LIST for codes; COUNT HITS for addresses.
Record: 1/1                              List of Values
```

The semicolons separate the hints. It can also display keyboard equivalents, LIST to display person IDs, COUNT QUERY HITS to display non person IDs, DUP ITEM to create new ID.

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.

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 double-clicking 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**
💾 *or* File > Save	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. Save the records:

Mouse	**Keyboard**
💾 *or* File > Save	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. Save the records:

Mouse	**Keyboard**
💾 *or* File > Save	F10 function key

Appendix 1: Quick Reference Chart

File	**Edit**	**Block**	**Field**	**Record**	**Query**	**Help**

File	Edit	Block	Field	Record	Query	Help
Direct Access	Cut *CTRL+X*	Previous *CTRL +PgUp*	Previous *SHIFT+TAB*	Previous *ARR*	Enter *F7*	Online Help
Object Search	Copy *CTRL+C*	Next *CTRL +PgDn*	Next *TAB*	Next *ARR*	Execute *F8*	Dynamic Help Query
QuickFlow	Paste *CTRL+V*	Clear *SHIFT+F5*	Clear *CTRL+u*	Scroll Up *PAGE Up*	Last Criteria	Dynamic Help Edit
Select	Edit *CTRL+e*		Duplicate *F3*	Scroll Down *PAGE Down*	Cancel	Help (Item Properties) *F1*
Rollback *Shift+F7*				Clear *SHIFT+F4*	Count Hits *SHIFT+F2*	Show Keys *Ctrl+F1*
Save *F10*				Remove *Shift+F6*	Fetch Next Set	List *F9*
Refresh				Insert *F6*		Display Error *SHIFT+F1*
Print				Duplicate *F4*		Calendar
Exit *Ctrl+q*				Lock		Calculator
Exit QuickFlow						Extract Data with Key
Exit SCT Banner						Extract Data no Key
Return to Menu						About SCT Banner
Preferences						

Key ⚷

Keyboard equivalents are shown in italics. <u>Some keystrokes vary from one environment to another in Banner.</u>

F2- Displays the Tab Menu
F3 – Used to duplicate a field/item also used to drill down to detail information
F5- Displays Go To field so you can access another form