



PRAIRIE VIEW A&M UNIVERSITY

Banner Basic Navigation Training

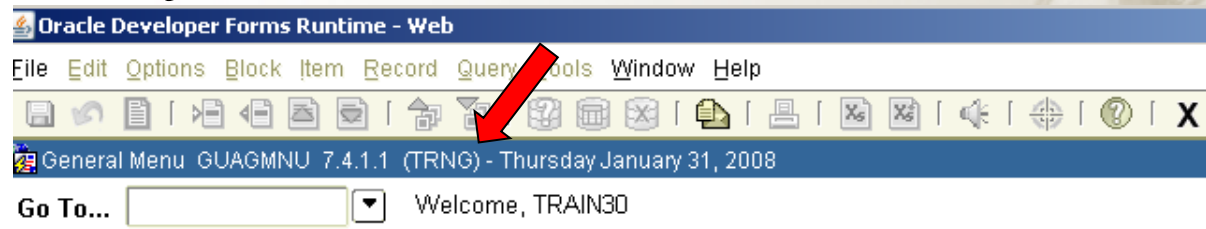


Topics

- Navigation
- Forms
- Data Entry Standards
- Help
- Searching in Banner

Banner Instances

- Test (TEST) – Testing of Patches and processes
- Pre-Production (PPRD) – Back up of Prod Daily
- Production (PROD) – LIVE data
- How do you know the current instance?



Getting to PVAMU Banner Instances

- Go to the PVAMU Homepage

- A horizontal navigation menu with a yellow background. It contains five items: 'FUTURE STUDENTS', 'CURRENT STUDENTS', 'ALUMNI', 'ATHLETIC', and 'FACULTY & STAFF'. A red arrow points from the 'ALUMNI' item to the 'ATHLETIC' item.

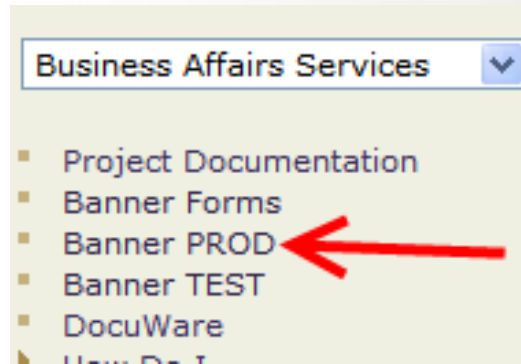
- Banner

Faculty Resources

- [Office of Academic Affairs](#)
- [Faculty Senate](#)
- [Faculty Resource Index](#)
- [Banner](#)
- [PantherTracks for Faculty](#)

Getting to PVAMU Banner Instances

- Banner PROD – Main working site



- Banner TEST

[Internet Native Banner \(INB\)](#)

[Training Database \[TRNG\]](#)

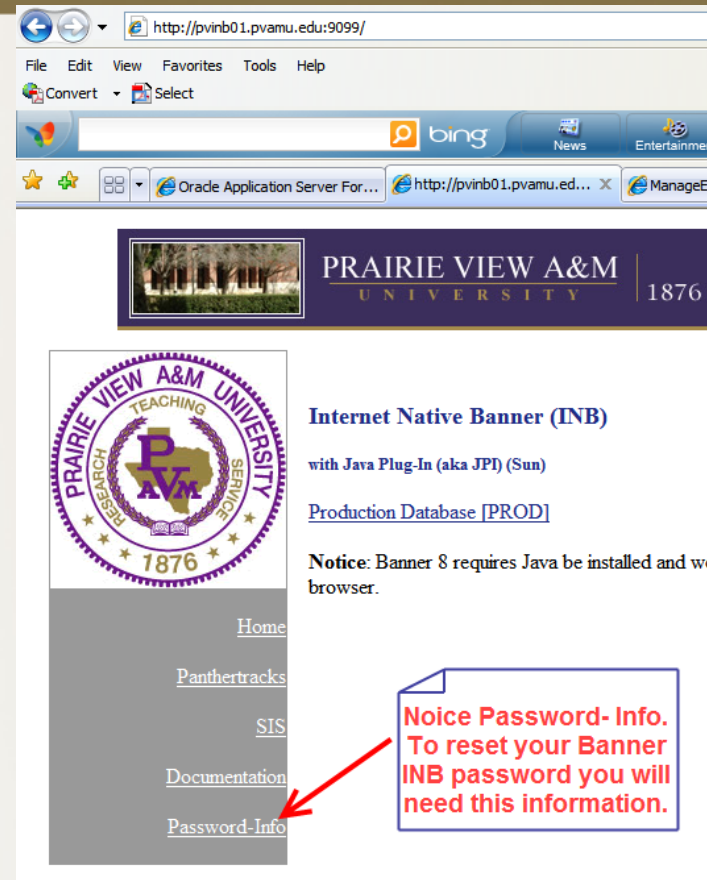
[Test Database \[TEST\]](#)

[Pre Prod Database \[PPRD\]](#)

[STAGE Database \[STAGE\]](#)

Saving to Favorites/Shortcuts

- When saving Banner INB to your favorites/shortcut this is the page you will want to use.




http://pvinb01.pvamu.edu:9099/


File Edit View Favorites Tools Help

Convert Select

bing News Entertainment

Oracle Application Server For... http://pvinb01.pvamu.edu... ManageE

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Internet Native Banner (INB)
with Java Plug-In (aka JPI) (Sun)

[Production Database \[PROD\]](#)

Notice: Banner 8 requires Java be installed and w...
browser.

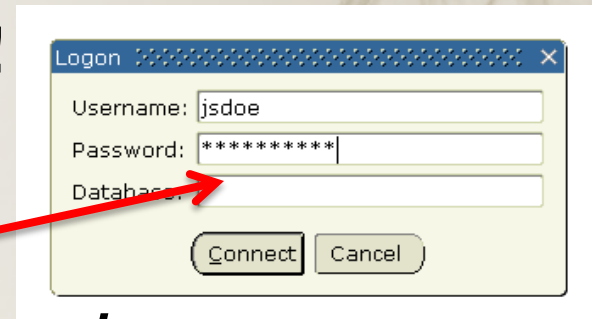
Home
[Panthertracks](#)
[SIS](#)
[Documentation](#)
[Password-Info](#)

Notice Password-Info.
To reset your Banner
INB password you will
need this information.

Logging into Banner

- At the log-in screen type your username
- Your password
- Example: Username: jsdoe

Password: H@rd2cr@K!

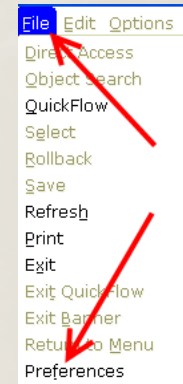


A screenshot of a 'Logon' dialog box. The dialog has a title bar with 'Logon' and a close button. It contains three input fields: 'Username:' with the text 'jsdoe', 'Password:' with a masked password '*****', and 'Database:' which is empty. Below the fields are two buttons: 'Connect' and 'Cancel'. A red arrow points from the 'Database' field to the text 'Leave the Database field blank' in the list below.

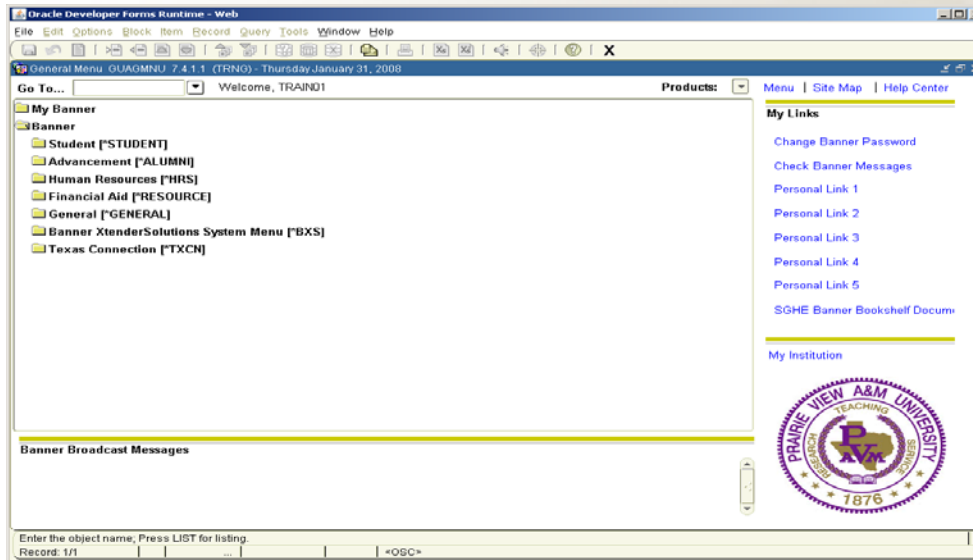
- *Leave the Database field blank*
- Click on Connect

Before We Get Started – Adding Form Names

- It is important to learn the form names and how to spell the form
- Click File then Preference
- Check all boxes in Display Options
- Log out and then back in again and you will now see the form names

A screenshot of a software application's settings window. The 'Display Options' tab is selected. The 'Display Options' section has four checked checkboxes: 'Display Form Name on Title Bar', 'Display Form Name on Menu', 'Display Release Number on Title Bar', and 'Display Database Instance on Title Bar'. The 'Alert Options' section has four checked checkboxes: 'Prompt Before Exiting Banner', 'Display Additional Confidentiality', 'Display Additional Deceased Vitals', and 'Display Duplicate SSN/SIN/TIN'. The 'Data Extract' section has one checked checkbox: 'Include Header Row in Data Export'.

Internet Native Banner (INB)



- Oracle Application Server and Forms must remain open for Banner to operate



Navigation - Methods

- **Main Menu** – Select from a list of menus, forms and jobs
- **Direct Access** – Access menu or job by its name
- **Object Search** – If you know part of the name of a form or job
- **Options Menu** – From within a form you can access other forms, windows and blocks related to the current form, window and block

Navigation - Methods continued...

- **Iconic buttons** – These are located on the horizontal toolbar
- **Keyboard equivalents** – use the keyboard to access a form, window, block, or field
- **Last 10 forms in the File pull-down menu** – you can quickly re-access a form that was previously opened in the current session

Navigation - Main Menu

Provides an overview of the menus, forms, and jobs; is used to navigate through Banner

The screenshot shows the Oracle Developer Forms Runtime - Web interface. The browser title bar reads "Oracle Developer Forms Runtime - Web". The menu bar includes "File", "Edit", "Options", "Block Item", "Record", "Query", "Tools", "Window", and "Help". The tool bar contains various navigation icons. The main content area is titled "General Menu GUAGMNU 7.4 (TRNG) - Tuesday May 01, 2007" and "Welcome, CONSULT01". The "Products" dropdown is set to "Menu", with links for "Menu", "Site Map", and "Help Center". The "Main Menu" is a tree view with folders: "My Banner", "Banner", "Student [*STUDENT]", "Advancement [*ALUMNI]", "Human Resources [*HRS]", "Financial Aid [*RESOURCE]", "General [*GENERAL]", and "Texas Connection [*TXCN]". The "My Links" section includes "Change Banner Password", "Check Banner Messages", "Personal Link 1-5", and "SGHE Banner Bookshelf Docum". The "User Manual" link is also present. The "Banner Broadcast Messages" section is at the bottom. The "SUNGARD" logo and "SCT • HIGHER EDUCATION" text are visible, along with a building image.

Menu Bar →

Tool Bar ←

Direct Access →

Main Menu

Change my Password

User Manual

Navigation - Main Menu Continued

Arranged in a hierarchy

Click on folder to expand menu and click the folder again to collapse.

Double click, or press Enter, to bring up the form or job

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Tools Window Help

General Menu GUAGMNU 7.4 (TRNG) - Tuesday May 01, 2007

Go To... Welcome, CONSULT01 Products: Menu | Site Map | Help Center

- Banner
 - Student [*STUDENT]
 - Advancement [*ALUMNI]
 - Human Resources [*HRS]
 - Financial Aid [*RESOURCE]**
 - Applicant Processing [*RESAPPL]
 - Need Analysis [*RESNEED]
 - Requirements Tracking [*RESTRACK]
 - Budgeting [*RESBUDG]
 - Packaging and Disbursement [*RESPACK]
 - Funds Management [*RESFUND]
 - Electronic Data Exchange [*RESEDE]
 - History and Transcripts [*RESHIST]
 - Financial Aid Common Functions [*RESCOMM]
 - Student System Shared Data [*RESSHARE]
 - Short-Term Credit [*RESSHORT]
 - Student Employment [*RESEMPL]
 - Loan Processing [*RESLOAN]
 - Return of Title IV Funds [*RESTRFND]

My Links

- Change Banner Password
- Check Banner Messages
- Personal Link 1
- Personal Link 2
- Personal Link 3
- Personal Link 4
- Personal Link 5
- SGHE Banner Bookshelf Docum

My Institution

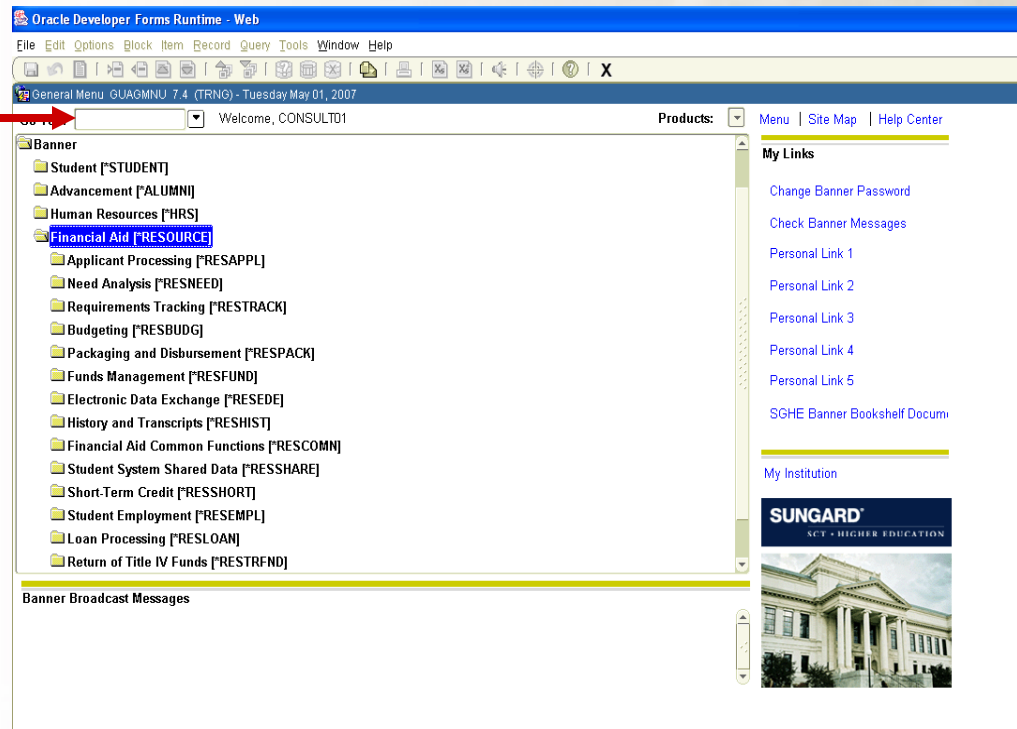
SUNGARD
ACT • HIGHER EDUCATION

Banner Broadcast Messages

Navigation - Direct Access

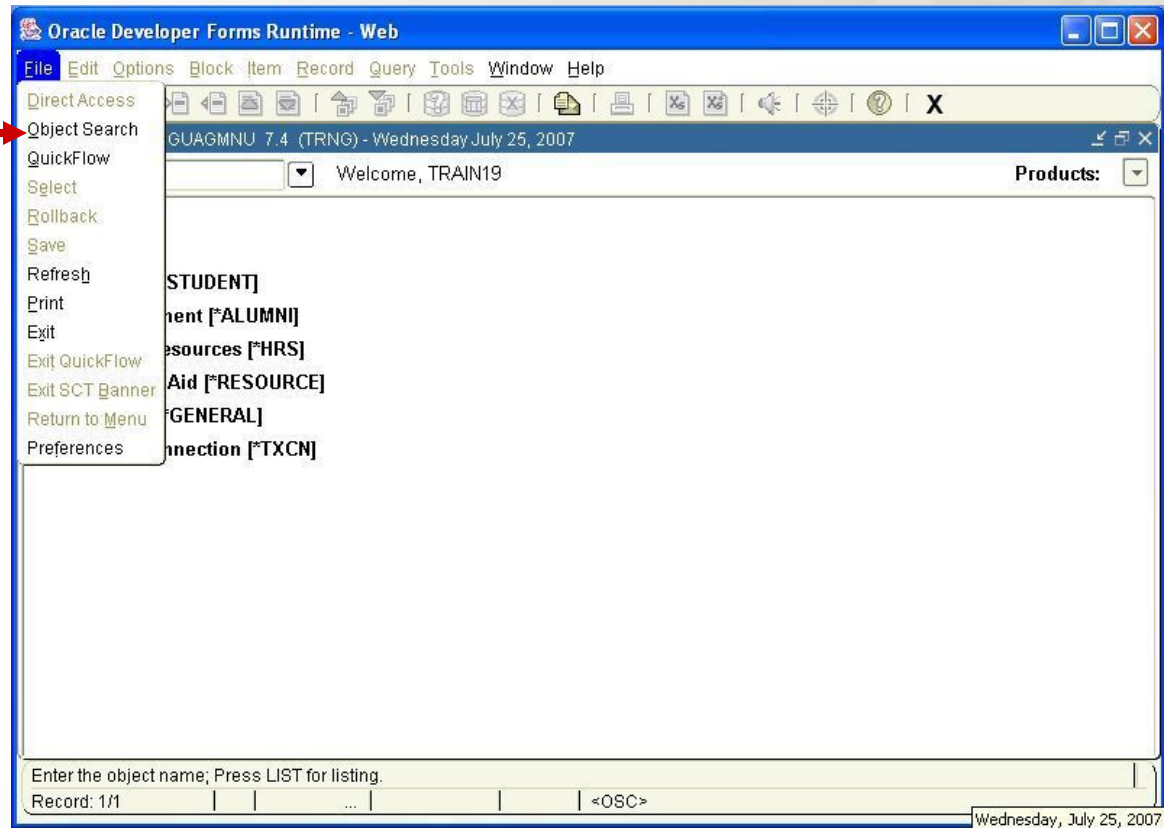
- Allows direct access to forms, jobs, and menus by name

Direct Access



Navigation - Object Search

Object Search



Navigation - Object Search Continued...

Object Search GUIOBJJS 7.0 (TRNG)

Name	Description	Type
%AWRD		

Start Clear Cancel

1. Enter part of name and wildcard (%)

Object Search GUIOBJJS 7.0 (TRNG)

Name	Description	Type
ADIAWRD	Designation Financial Aid Query	Form
RPAAWRD	Award Maintenance	Form
RPRAWRD	Applicant Award Report	Jobs

Start Clear Cancel

2. Press F8

3. Highlight Name

4. Press Start to go to form

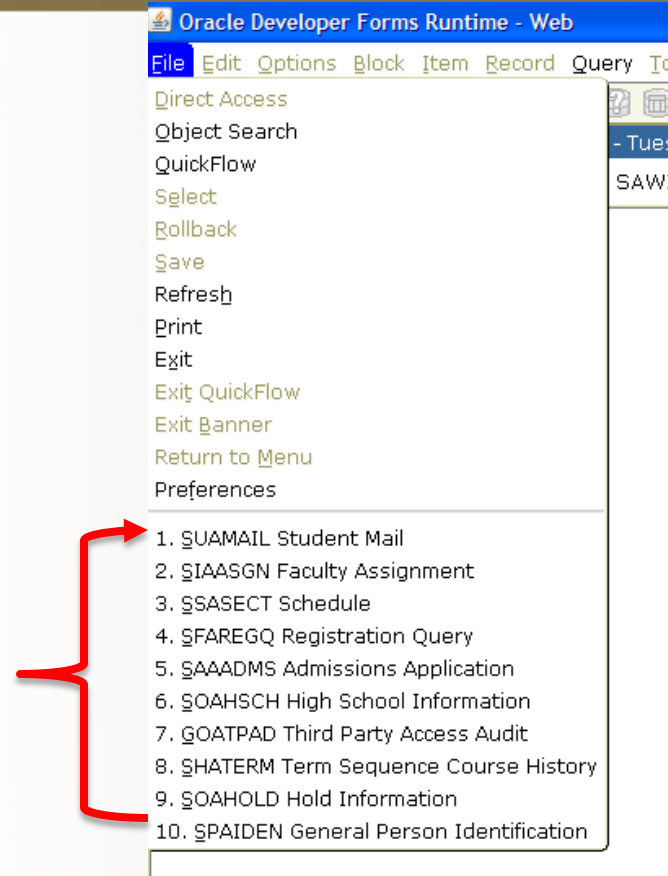
Navigation - Option Menus

Select the Options drop down box to navigate to other sections of form, or related forms

The screenshot displays the Oracle Developer Forms Runtime - Web interface. The title bar reads "Oracle Developer Forms Runtime - Web: Open > RNANA08". The menu bar includes "File", "Edit", "Options", "Block", "Item", "Record", "Query", "Tools", "Window", and "Help". The "Options" menu is open, showing a list of form sections. A red arrow points to the "Options" menu item. Another red arrow points to the "Applicant Award Detail [RPAAWRD]" option in the menu. The main form area contains various input fields and labels, including "Create Person", "Current Record:", "Transaction Number:", "EDE Correction:", and "Number of Applications:". The form is divided into sections by horizontal lines, and the "Applicant Award Detail" section is highlighted. The status bar at the bottom reads "ID; Press LIST for Name/ID search, COUNT HITS for Alternate ID Search, INSERT RECORD to create Person Record: 1/1 | ... | <OSC>".

Notice again Form names are visible

Navigation - Last 10 Forms In Pull-Down

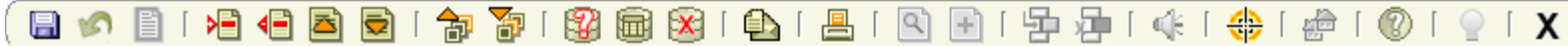


Forms - Definition

- What are Forms?
 - A Banner Form is an online document where you can enter and look up information in your database
 - A Banner form is similar to a paper form, except information is entered once and then used by other forms, reports, and jobs

Iconic Buttons Continued

File Edit Options Block Item Record Query Tools Help

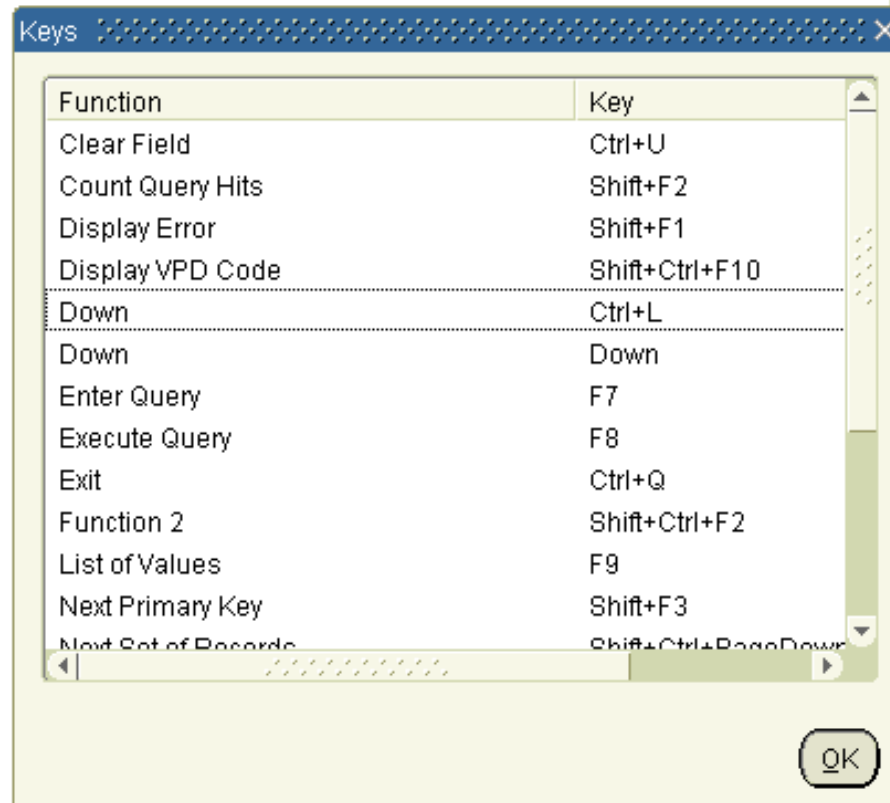


General Person Identification SPAIDEN 8.2 (PROD)

The image shows a detailed view of the toolbar icons from the previous image, with each icon placed above a teal box containing its function name. The labels are: Save, Rollback, Select, Insert Record, Delete Record, Previous Record, Next Record, Previous Block, Next Block, Enter Query, Execute Query, Cancel Query, View/Send Messages, Print, Xtender Solutions, Fine Grain Access, On-Line Help, and Exit.

Hover over the top of each
Icon for explanations

Keyboard Equivalents



A screenshot of a 'Keys' dialog box with a blue title bar and a close button. The dialog contains a table with two columns: 'Function' and 'Key'. The table lists various functions and their corresponding keyboard shortcuts. An 'OK' button is located at the bottom right of the dialog.

Function	Key
Clear Field	Ctrl+U
Count Query Hits	Shift+F2
Display Error	Shift+F1
Display VPD Code	Shift+Ctrl+F10
Down	Ctrl+L
Down	Down
Enter Query	F7
Execute Query	F8
Exit	Ctrl+Q
Function 2	Shift+Ctrl+F2
List of Values	F9
Next Primary Key	Shift+F3
Next Set of Records	Shift+Ctrl+PageDown

Click on Help-
Show Keys
To see Keyboard
Equivalents

Form - Parts

Search Block



Information Block



Auto Hint/ Status Line

Error messages and processing messages appear here



The screenshot shows the Oracle Developer Forms Runtime interface for a 'Create Person' form. The window title is 'Oracle Developer Forms Runtime - Web: Open > RNANA08'. The menu bar includes File, Edit, Options, Block, Item, Record, Query, Tools, Window, and Help. The toolbar contains various icons for navigation and actions. The main form area is titled '2007-2008 Need Analysis RNANA08 7.7 (TRNG)' and contains several tabs: Demographic, Plans and Educational Background, Status, Income and Assets, and Information Release. The 'Demographic' tab is active, showing a 'Lock Current' checkbox. Below this, there are fields for Last Name, First Name, Middle Initial, Male, Address, City, State, Zip, Home Phone Number, Legal Residence, Resident Since, Driver's License State, Driver's License Number, Social Security Number, and E-mail. To the right of these fields are Date of Birth, Citizenship Status, Alien Registration Number, Legal Resident Before 01-JAN-2002, Current Marital Status, Date of Status, 1st Bachelor's Degree by 01-JAN-2007, and Aid Eligibility Response or Drug Offense Conviction. A red box highlights a dropdown arrow icon on the Address field, labeled 'LOV button'. The status bar at the bottom contains the text: 'ID; Press LIST for Name/ID search, COUNT HITS for Alternate ID Search, INSERT RECORD to create Person'. The status bar also shows 'Record: 11' and 'Page: 1 of 1'.

Form - Elements

The screenshot displays the Oracle Developer Forms Runtime interface for a web application. The window title is "Oracle Developer Forms Runtime - Web: Open > GUAMESG". The menu bar includes "File", "Edit", "Options", "Block", "Item", "Record", "Query", "Tools", "Window", and "Help". The toolbar contains various icons for navigation and editing. The main content area shows a list of "General Message" records for "GUAMESG 7.4 (TRNG)". Each record has fields for "Recipient", "Message", "Reference ID", "System", "Sender", "Date", "Source", "Item", and "Time". The "System" field for each record contains radio buttons for "Complete", "Pending", "Hold", and "Confidential". The "Confidential" radio button in the first record is circled in red. A vertical scrollbar is visible on the right side of the list. The status bar at the bottom shows "FRM-40350: Query caused no records to be retrieved." and "Record: 1/1".

Annotations on the left side of the image:

- Iconic buttons**: Points to the edit icon (pencil) next to the Message field of the first record.
- Radio buttons**: Points to the "Complete" radio button in the System field of the first record.
- Fields**: Points to the "Recipient" and "Message" input fields of the first record.
- Record**: Points to the entire first record row.

Annotations on the right side of the image:

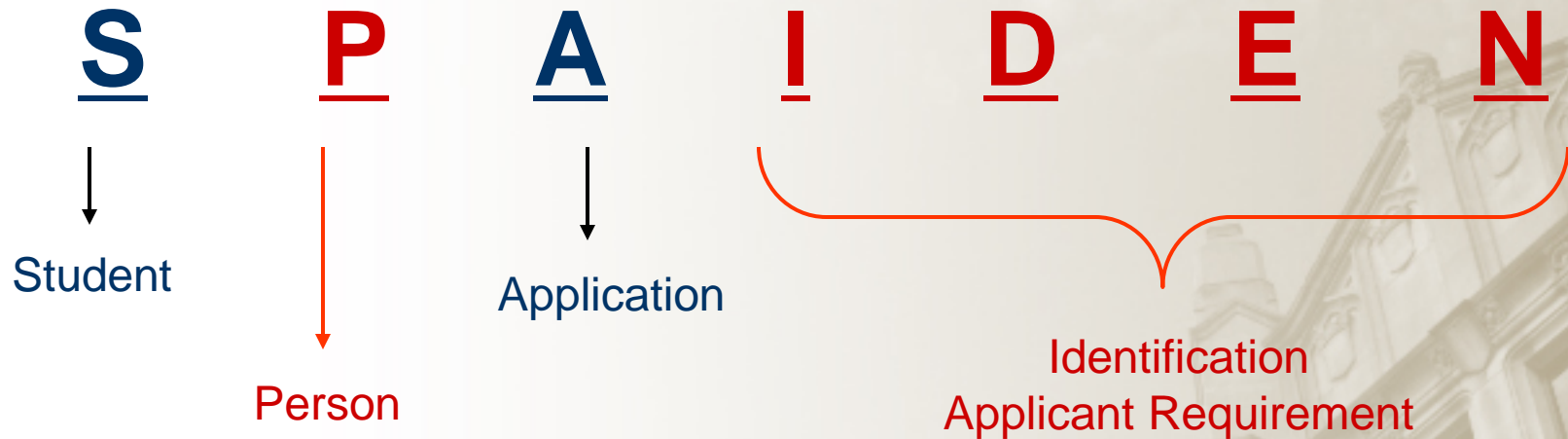
- Checkbox**: Points to the "Confidential" radio button in the System field of the first record.
- Vertical Scrollbar**: Points to the vertical scrollbar on the right side of the list.

Form - Names

- All Banner forms, reports, jobs, and tables have seven-character names with the following structure:
 - **Position 1:** Identifies the system owning the form, report, process, or table
 - **Position 2:** Identifies the module for the application
 - **Position 3:** Identifies the type of form, report, process, or table
 - **Positions 4, 5, 6, and 7:** Creates a unique four-character name description

Form – Names continued

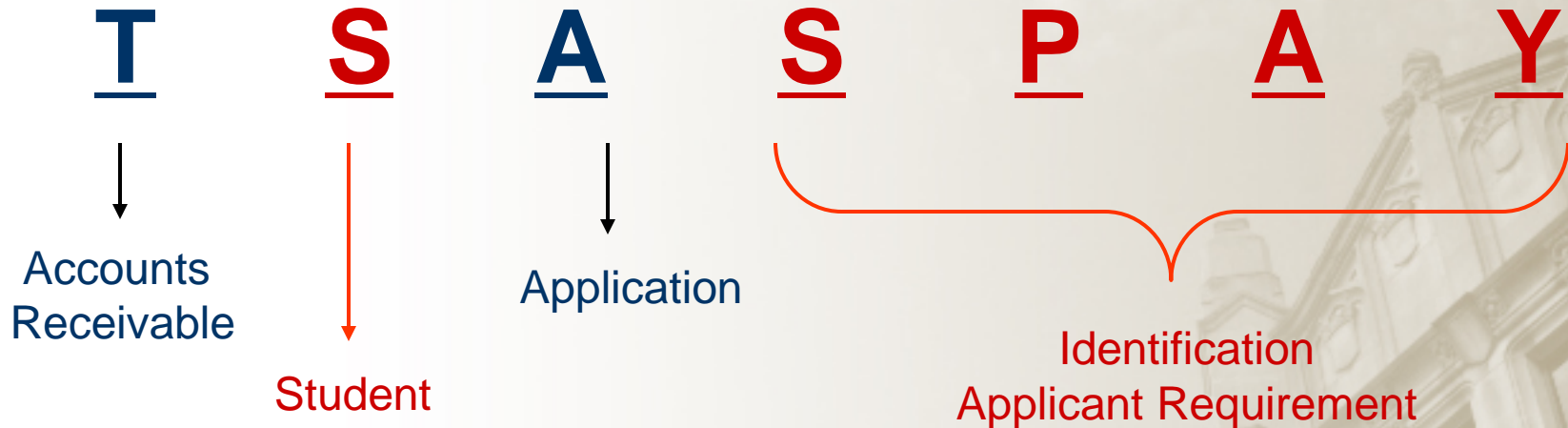
S Forms = Student Forms



SPAIDEN = General Person Identification Form

Form – Names continued

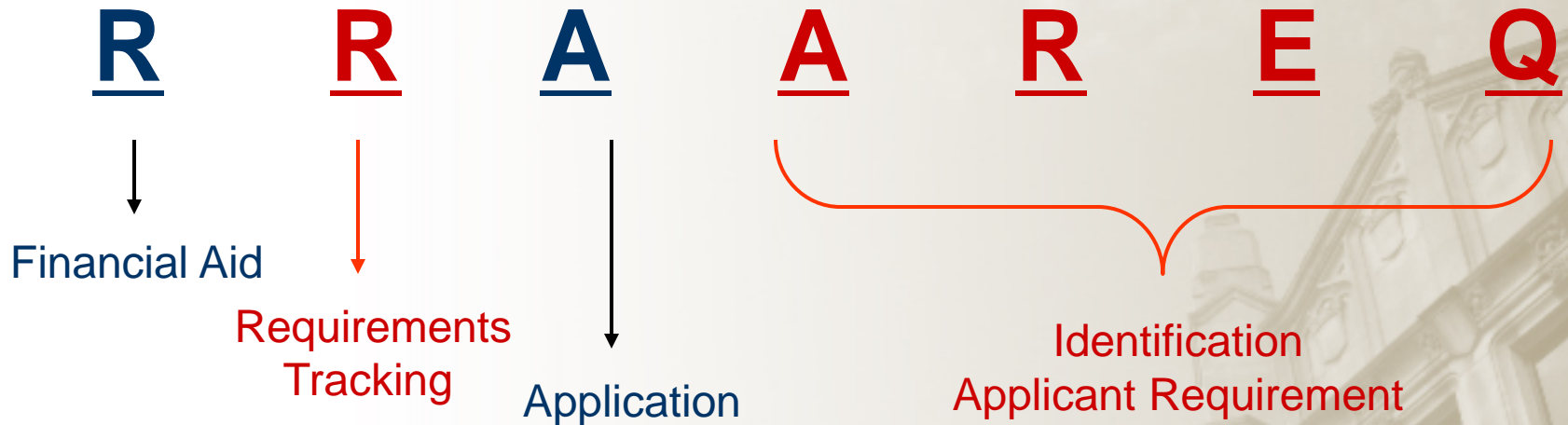
T Forms =Accounts Receivable Forms



TSASPAY = Student Payment Form

Form Names

R Forms = Financial Aid Forms



RRAAREQ = Applicant Requirement Form

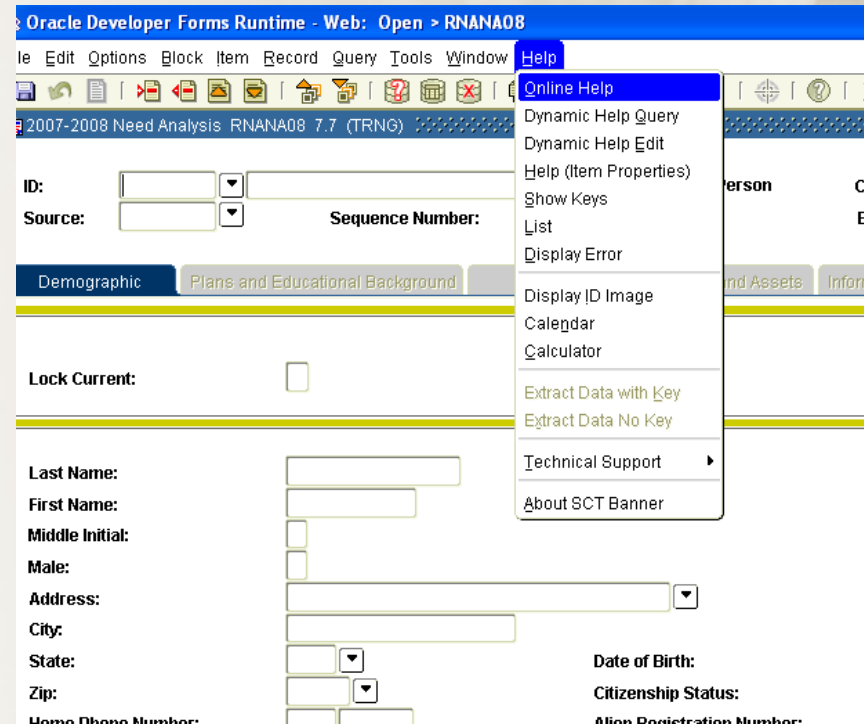
Data Entry Standards

- Used in entry and processing of institutional data in Banner
- Helps reduce creation of duplicate records
 - always search before adding
- Provides method for consistent data entry, record updates, and institutional reports
- Banner Data Mapping for Texas Higher Education Coordinating Board Reporting

Help

- Types of Help

- Online Help
- Dynamic Help Query
- SunGard Banner Bookshelf
- Show Keys
- Help (Item Properties)
- Auto Hint



Help - Dynamic Help Query

- Banner

- Provided by SunGard and is updated with each system upgraded.

Help Form GUAHELP 7.4 (TRNG)

Form

Block

Field

Banner

Local Help Exists?

Edit Clear Cancel

Help - SGHE Banner Bookshelf

- Provides access to user manuals, release guides, and other available system documentation directly from your computer
- Can be accessed from the My Links on the Main Menu
- Tip: Press and **HOLD** the CTRL button (located on the lower left hand of the keyboard) when clicking on this link to open the file. Continue holding down the CTRL button until download is complete.

Types of Banner Records

- General Person
 - Students, faculty, and staff
- Non-Person
 - Businesses, grant programs, research agencies, etc.
- A General Person and non-person must have a record in Banner before *any other* data can be processed

General Person Record (SPAIDEN)

- Banner ID number will start with a 'P'
- Social Security Number cannot be used to locate a student record
- In most instances, records which started in Banner will begin with 'P2'
- Records can be found with the first name, last name or date of birth

Wildcard Searches

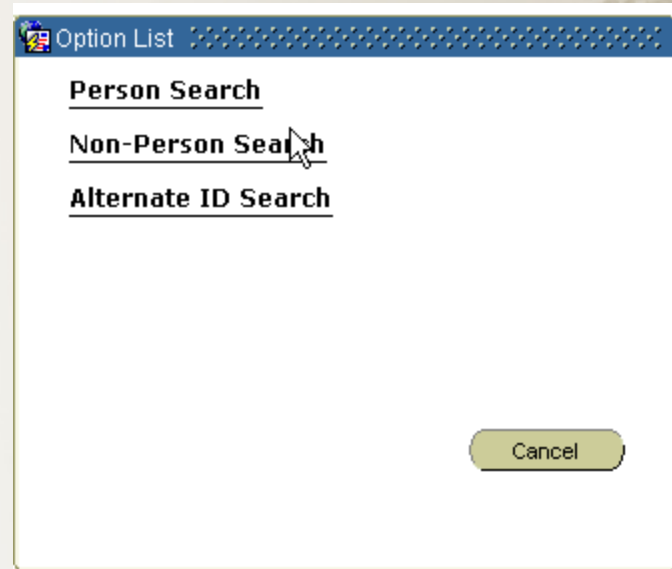
- The Banner wild card is the symbol %. Use the Banner wild card when searching for a name. This symbol stands for any letter, number, or symbol; or any group of letters, numbers and symbols.
 - Examples: Griffith/Griffin: To search for a name that may be Griffith or Griffin or Griffin-Myers, type in Griff% in the last name field and execute a query. Banner displays all names that begin with Griff.
- Wildcard may be used more than once in a field. Example: %good% will return: Goode, Thurgood, Goodyear, Begood-Marshall, etc.

Wildcard Searches continued...

- The underscore _ key is used to replace one character at a time. Since this character generates a more specific search – it should run a bit faster!
 - Examples: To search for Anderson/Andersen use Anders_n. The search will return records for both AndersOn and AndersEn.

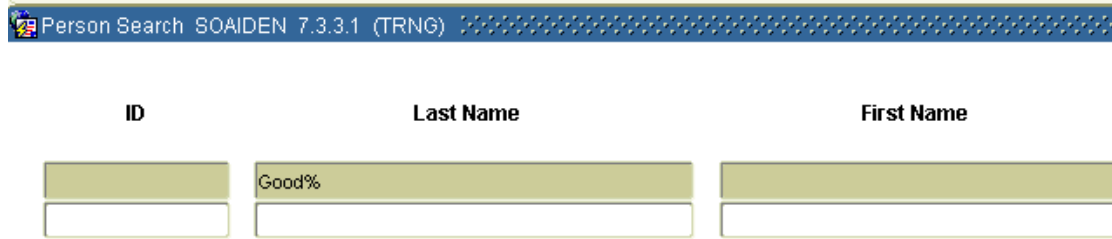
More than one way to search

- SPAIDEN
- Use the drop down button and select Person Search



More than one way to search

- SOAIDEN – Person Search
 - Type in parameters and hit F8



Person Search SOAIDEN 7.3.3.1 (TRNG)

ID	Last Name	First Name
<input type="text"/>	Good%	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

- To select the record, move the cursor to the record and double click

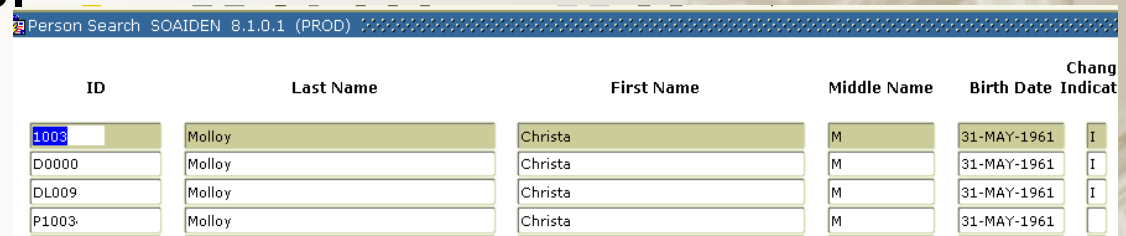
A00012119	Goode	Ima
710000023	Goodhart	Gerald
711000086	Goodman	Sherrie
A00011799	Goodson	Robert
A00012121	Goodyear	Blimpe

Multiple Records in Banner

- Banner maintains all versions of a person.
- When a person changes their name or ID, Banner registers the change and keeps the old information in the database. This makes it possible to find someone using the old name or ID information.
- Only the record with the most recent name and ID information is current. To determine the current record, see the change indicator in the Change Field (CHG), the farthest right column of the search form.

Multiple Records in Banner continued...

- No entry in the Change Field indicates the current record for that person.
- I in the Change Field indicates that the ID in this row has been changed. This row shows the old ID.
- N in the Change Field indicates that the name in this row has been changed. This row shows the old name.

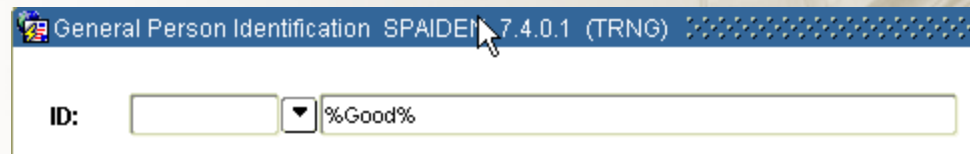


Person Search SOAIDEN 8.1.0.1 (PROD)

ID	Last Name	First Name	Middle Name	Birth Date	Change Indicat
1003	Molloy	Christa	M	31-MAY-1961	I
D0000	Molloy	Christa	M	31-MAY-1961	I
DL009	Molloy	Christa	M	31-MAY-1961	I
P1003	Molloy	Christa	M	31-MAY-1961	

More than one way to search

- SPAIDEN
- Clear ID field (with the cursor in the field hit the space bar)
- Tab to the name field
- Type in the name and wildcard characters and hit the Tab button



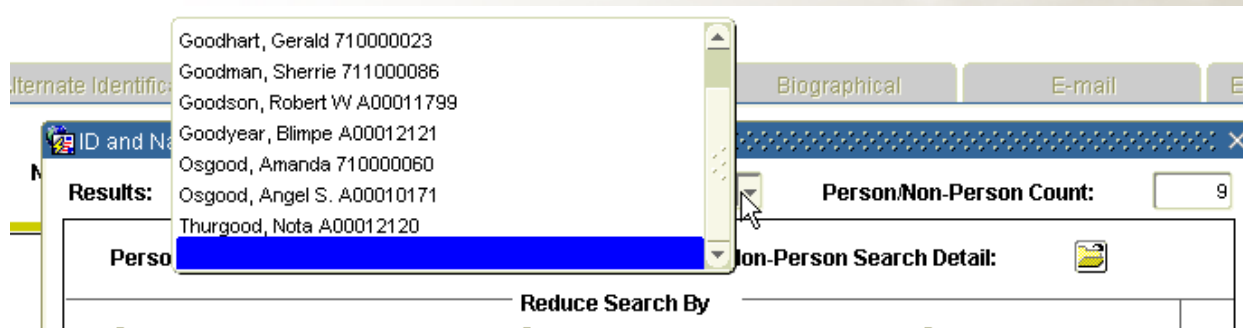
- If name appears there is only one record

More than one way to search

The screenshot shows a web browser window titled "ID and Name Extended Search". At the top left, there is a "Results:" label next to a dropdown menu. To the right of this is a "Person/Non-Person Count:" label followed by a text box containing the number "9". Below these are two tabs: "Person Search Detail:" and "Non-Person Search Detail:". In the center, there is a section titled "Reduce Search By" with three radio button options: "Person", "Non-Person", and "Both", where "Both" is selected. Below this is the instruction "Enter search criteria then press Execute Query or select button to reduce search." followed by a search icon. The search criteria section includes: "City:" with a text input field; "State or Province:" with a text input field and a dropdown arrow; "ZIP or Postal Code:" with a text input field and a dropdown arrow; "Name Type:" with a text input field and a dropdown arrow; "Birth Date:" with a text input field; and "Gender:" with a small text input field. At the bottom, there is the instruction "Press Enter Query or select button to clear search." followed by a refresh icon.

More than one way to search

- Select the drop down button to see the available selections



- Move cursor and double click to select record
- Indented records when clicked on will open the most current record



Questions & Answers

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