



Welcome To

# OnDemand Training

*"Access to tools and resources at your fingertips"*



PRAIRIE VIEW  
A&M UNIVERSITY

# Banner Navigation and Refresher

VERSION 2023.1

# What is Banner?

- The Official Student Information System (SIS)
- Transactional system.
- Not a reporting system.
- Banner houses alumni, financial aid, student and personnel data.

# Best Practices

- ▶ Do not share your password.
- ▶ Do not share accounts.
- ▶ All actions performed in Banner are audited
- ▶ You may only access records if you have a business need to do so

# What type of data can be found in Banner?

- Student admissions
- Student academic history
- Student financial aid
- Some faculty data
- Student account receivables
  
- Does not contain employee HR data
- Does not contain finance data
  
- Access to this information is controlled by the administrative offices such as the Registrar's Office, Financial Aid, Admissions, etc. (CITE is not custodian of information and therefore cannot approve access.)

# Before you get started....

- Banner works on all browsers: Chrome, FireFox, Internet Explorer, Safari
  - **Recommended: Chrome**
- If you experience any issues, first try clearing your cache (browser history)
- Do not use “incognito” or “InPrivate” browsing
- Experiencing issues? Call the CITE Helpdesk @ **936-261-2525** or **servicedesk@pvamu.edu**

## Before you get started.... Cont'd

- Login often. Accounts are deleted by the system if they go unused.
- **“Your name. Your problem.”** Do not share your account with others. You are responsible for any actions performed under your account. If someone needs access they should request an account of their own.
- **“Just because you can, doesn’t mean you should.”** Only access information if you have a legitimate business reason to do so.



# Banner Access



# First things First...

- Complete the Banner Access Request form

- The latest form is found at  
**[pvamu.edu/formslibrary](http://pvamu.edu/formslibrary)**

## Forms

- [Administrative Privileges for Personal Workstation](#)
- [Argos Forms](#)
- [Banner Forms](#)
- [Business Case Study Template](#)
- [Change Management Request Form](#)
- [Department Organization Email Account](#)
- [Disk Storage Request](#)
- [Faculty & Staff Loaner Laptop Request Form \(New\)](#)
- [Information Security Forms](#)
- [Internet Protocol \(IP\) Address/ Firewall/ DNS Service Request](#)
- [Remote Access/VPN Request](#)
- [Request for Portable Computing Electronic Device Forms](#)
- [Software Review](#)
- [Special Purpose AD Account Request Form](#)
- [Telephone Services Forms](#)
- [Web Directory Change Request Form](#)
- [Web Services Forms](#)

# Need Access?

- Access to forms is approved by data owners (information owners)
  - i.e. student admission forms → admissions office
    - student financial aid forms → financial aid office
    - student academic history → registrar's office

# Now that you have access – Logging in

- ▶ PV Place [www.pvamu.edu/pvplace](http://www.pvamu.edu/pvplace)



- ▶ <https://www.pvamu.edu/irm/information-resources/banner/>



# Banner 9 – Logging in

The screenshot displays the Prairie View A&M University website. At the top left is the university logo and the tagline "IGNITE your passion...EXPERIENCE PVAMU". A navigation menu on the left lists various services, with "Employees" highlighted in a red box. The main content area is titled "EMPLOYEES" and includes a breadcrumb trail "Home Community / Employees". Below this is a section for "Online Services" containing several tiles. The "Banner 9" tile, which is yellow with the text "Banner 9" in purple, is highlighted with a red box. Other visible tiles include "SINGLE SIGN ON" (blue), "ITS" (yellow with purple text), "MAINTENANCE" (purple with yellow text), "PARKING MANAGEMENT" (yellow with a purple 'P' in a circle), and "CANOPY SYSTEM" (yellow with purple text). The browser's address bar shows "My Sites" and "Mic".

# Navigation

# Banner 9 – Welcome page

The screenshot shows the Banner 9 Welcome page. At the top, there is a navigation bar with the Prairie View A&M University logo, a search icon, a recently opened icon, and a user profile for 'Banner User' with a 'Sign Out' button. The main content area features a large 'Welcome' heading over a background image of a campus scene. A search box is prominently displayed with a callout explaining its function. Below the search box, three callouts describe the 'Recently Opened Icon', 'Search Icon', and 'Menu Icon' located in the top navigation bar. The footer contains copyright information, a release version, and keyboard shortcuts.

Prairie View A&M University

Banner User Sign Out

## Welcome

Search Box: Type in page name (i.e. SPAIDEN) or description directly

Recently Opened Icon: shows previously opened pages

Search Icon: allows you to go to search or go to a new page without having to come back to Welcome page

Menu Icon: shows the main menu and "My Banner" menu; only forms you have access to will be listed

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Keyboard Shortcuts

# Banner 9 – Page Navigation

The screenshot displays the Banner 9 SPAIDEN 9.3.6 (PROD) interface for user management. The page is annotated with several callouts:

- Sign Out:** A red box highlights the "Sign Out" link in the top right corner of the user profile area.
- Exit page:** A blue box with an arrow points to the "X" icon in the browser's tab bar.
- Section:** A blue box highlights the "PERSON" section header.
- Start Over:** A blue box with an arrow points to the "Start Over" button in the top right of the form area.
- Previous Section/Next Section:** A blue box with an arrow points to the navigation arrows in the bottom left corner.
- Save:** A blue box with an arrow points to the "SAVE" button in the bottom right corner.

The interface includes a top navigation bar with the Prairie View A&M University logo, a search bar, and a user profile for Mr. Michael Alberto Martinez. The main content area is divided into sections: IDENTIFICATION, PERSON, NON-PERSON, and ID AND NAME SOURCE. The PERSON section contains fields for Last Name, First Name, Middle Name, Prefix, Suffix, Preferred First Name, and Full Legal Name. The ID AND NAME SOURCE section includes fields for Last Update, Origin, Original Creation, User, and Create Date.

# Banner 9 – Page Navigation

The screenshot displays the Banner 9 SPAIDEN 9.3.6 (PROD) user interface. The page title is "General Person Identification SPAIDEN 9.3.6 (PROD)". The user is logged in as "Mr. Michael Alberto Martinez" with a "Sign Out" link. The interface includes a top navigation bar with "ADD", "RETRIEVE", "RELATED", and "TOOLS" buttons. A "Start Over" button is also present. The main content area is divided into sections: "IDENTIFICATION" (ID: P21837965), "PERSON" (Last Name: Test, First Name: Test), "NON-PERSON", and "ID AND NAME SOURCE" (Origin: GOAMTCH, User: NTWOODS, Create Date: 05/16/2018). Annotations with red arrows point to various elements: "Online Help" (top right), "Page name" (top left), "Student Id and Name" (ID field), "BDM buttons (AppXtender)" (ADD, RETRIEVE, RELATED buttons), "Related pages" (RELATED button), "Insert/Delete Record" (Insert, Delete, Copy buttons), and a question mark icon (top right).



# Banner 9 – Page Navigation

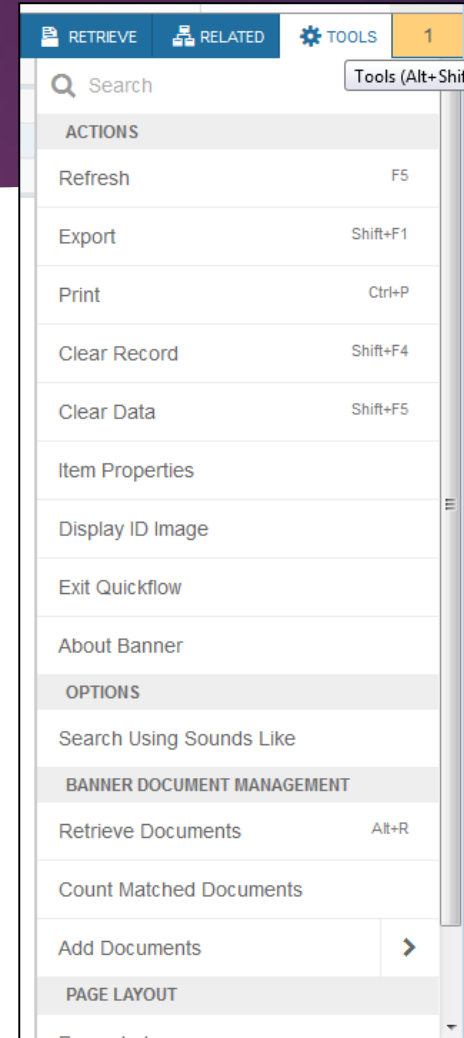
The screenshot displays the Banner 9 SPAIDEN 9.3.6 (PROD) interface. At the top, the user is logged in as Mr. Michael Alberto Martinez. The main header shows the current record ID: P21837965 Test, Test. The interface is divided into several sections: IDENTIFICATION, PERSON, NON-PERSON, and ID AND NAME SOURCE. The IDENTIFICATION section includes fields for ID, Name Type, and Name. The PERSON section includes fields for Last Name, First Name, Middle Name, Prefix, Suffix, Preferred First Name, and Full Legal Name. The NON-PERSON section includes a Name field. The ID AND NAME SOURCE section includes fields for Last Update, Origin, Original Creation, User, and Create Date. Annotations include a red box around the ID field, a blue box around the 'TOOLS' button, a blue box around the 'Filter' button, and a blue box around the 'Query' button. Red arrows point from the 'TOOLS' button to the 'Filter' button and from the 'Query' button to the 'Filter' button.

Related pages, options, extract data

"Query" button

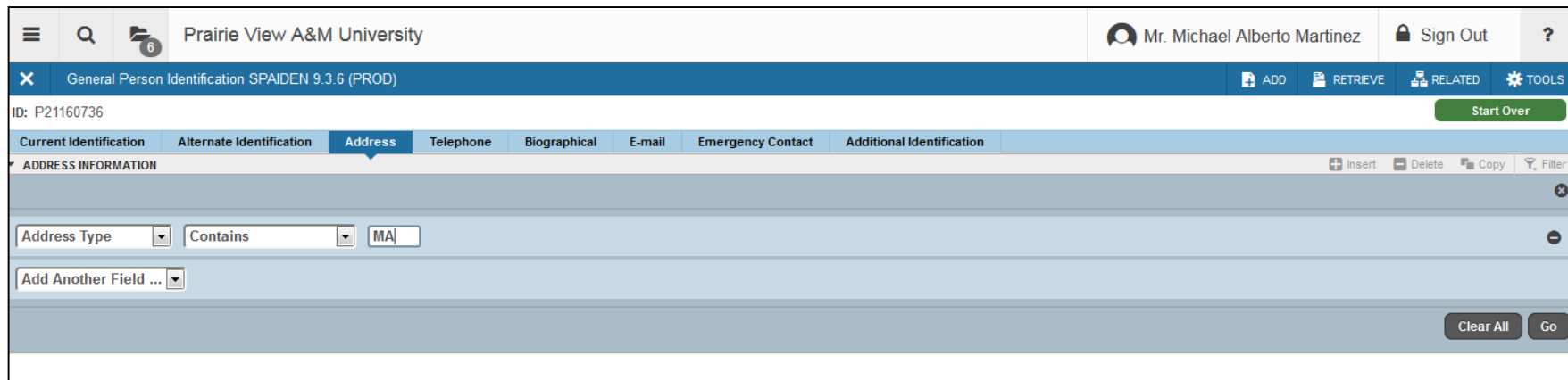
# Banner 9 – Tools menu

- ▶ Export
- ▶ Print
- ▶ Options
  - ▶ Contains related pages
- ▶ Access to Banner Document Management



# Banner 9 – Filter functionality

- ▶ Filter allows you to filter on a section only the records you care about.
- ▶ In the example below we are filtering a students record in the address tab to only find where the address type contains “MA”.



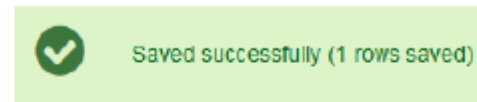
The screenshot shows the Banner 9 user interface for a student record. At the top, the user is identified as Mr. Michael Alberto Martinez. The record ID is P21160736. The 'Address' tab is selected, and a filter is applied to it. The filter criteria is 'Address Type' contains 'MA'. The interface includes a 'Start Over' button, a 'Filter' button, and 'Clear All' and 'Go' buttons at the bottom right.

# Banner 9 - Messages

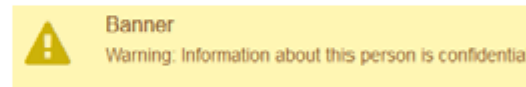
Replaces the Banner 8 Auto Hint/Status line

- **Types of Information that is Displayed**

- Green: Successful save of data



- Yellow: Warning messages



- Red: Error Messages



- Blue: Informational Messages



Some messages you must clear before you can proceed.

# Banner 9 – Help feature

ellucian. Banner Student Online Help

**Content** Search Results



Banner Student Online Help, January 2018

[Admissions Application/Checklist Summary \(SAAACKL\) page](#)

[Admissions Application \(SAAADMS\) page](#)

[Application User Defined Flags/Fields \(SAAAUDF\) page](#)

[Admissions Checklist Rules \(SAACHKB\) page](#)

[Admissions Decision and Rating Batch Entry \(SAADCBT\) page](#)

[Admissions Decision \(SAADCRV\) page](#)

[Admissions Decision Rules \(SAADCSN\) page](#)

[Electronic Application Process \(SAAEAPS\) page](#)

[Electronic Admissions Procedure/Routine Control \(SAAECRL\) page](#)

[EDI Cross-Reference Term Code Rules \(SAAECTM\) page](#)

[Electronic Admissions Application Rules \(SAAERUL\) page](#)

[Electronic Application Submitted \(SAAETBL\) page](#)

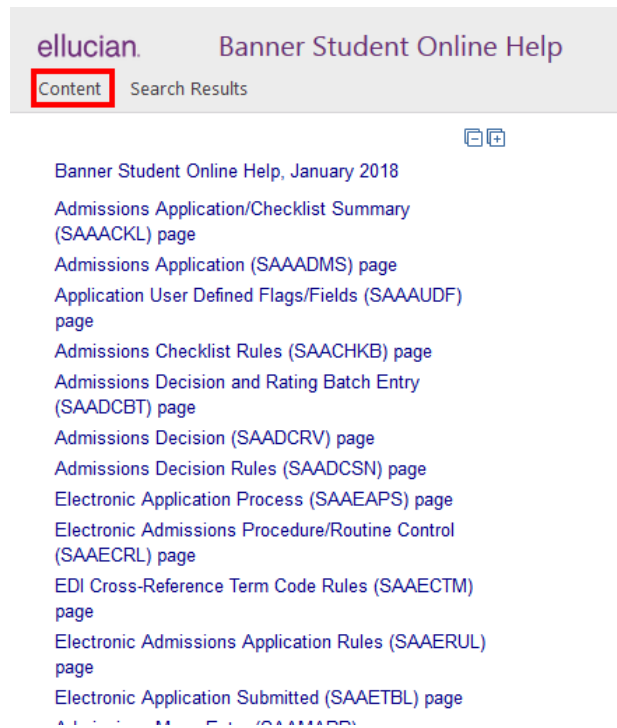
[Admissions Application \(SAAADMS\) page](#)

Mr. Michael Alberto Martinez Sign Out ?

ADD RETRIEVE RELATED TOOLS

Go

# Banner 9 – Help feature



ellucian. Banner Student Online Help

Content Search Results

Banner Student Online Help, January 2018

- Admissions Application/Checklist Summary (SAAACKL) page
- Admissions Application (SAAADMS) page
- Application User Defined Flags/Fields (SAAAUDF) page
- Admissions Checklist Rules (SAACHKB) page
- Admissions Decision and Rating Batch Entry (SAADCBT) page
- Admissions Decision (SAADCRV) page
- Admissions Decision Rules (SAADCSN) page
- Electronic Application Process (SAAEAPS) page
- Electronic Admissions Procedure/Routine Control (SAAECRL) page
- EDI Cross-Reference Term Code Rules (SAAECTM) page
- Electronic Admissions Application Rules (SAAERUL) page
- Electronic Application Submitted (SAAETBL) page
- Admissions Application (SAAADMS) page

- ▶ Click on “Content”
- ▶ Hit CTRL + F
  - ▶ To search for the page name or keywords

# Searching for a person record

- ▶ General Person Record (SPAIDEN)
  - Banner ID number will start with a 'P, F, A and D'
  - Social Security Number **cannot** be used to locate a student record
  - In most instances, records which started in Banner will begin with 'P2'

# More than one way to search

- ▶ SPAIDEN

- ▶ Enter in an ID directly or click on the LOV button (elipses)

Get Started: Fill out the fields above and press Go.

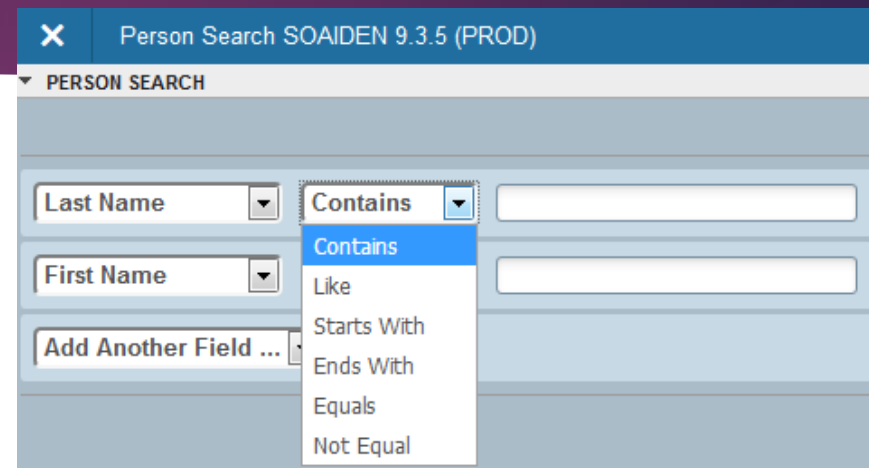
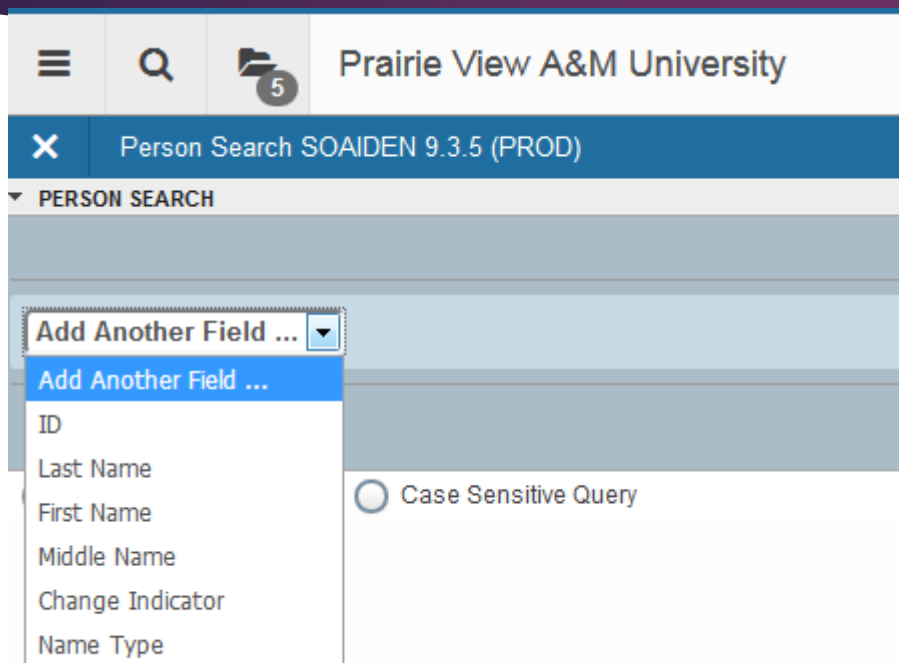
Option List

- [Person Search](#)
- [Non-Person Search](#)
- [Alternate ID Search](#)

Cancel

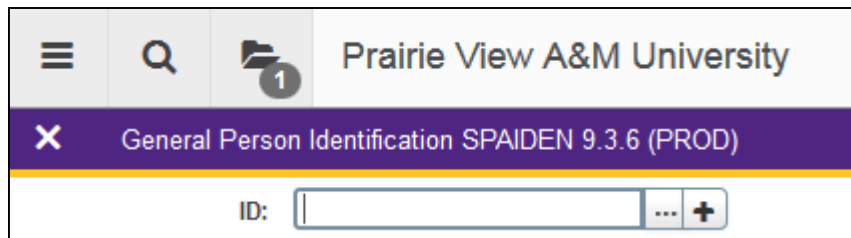


# More than one way to search



Choose the fields you want to search in and the type of search you want to perform.

# More than one way to search



ID:  ...

ID:  ...

► Search by using the student name in the key block.

1. Put your cursor in the ID field.
2. Hit Tab on your keyboard.
3. Enter in the name using % as your wildcard.
4. Click “Enter” on your keyboard.

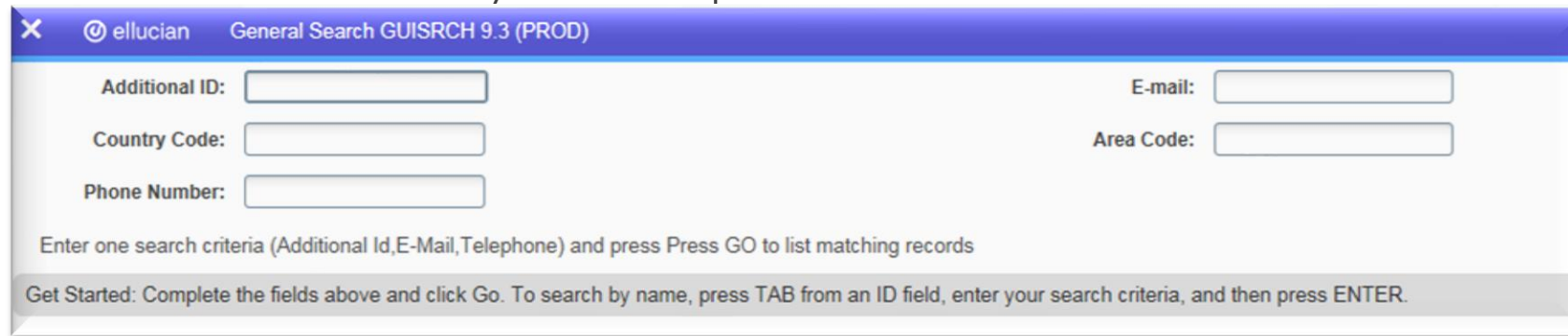
# Tips and Tricks

# Tips and Tricks

- Search by form description
- Use CTRL +/CTRL – to zoom in and out on the webpage
- Need to print? Use landscape.
- Use the “Export” feature to export data to an Excel file
- Use “Filter” to drill down data to only what you are interested in.
- Use the “Help” feature to see a forms purpose and how it is used.

# Tips & Tricks

- ▶ Use GUISRCH to search by email or phone number

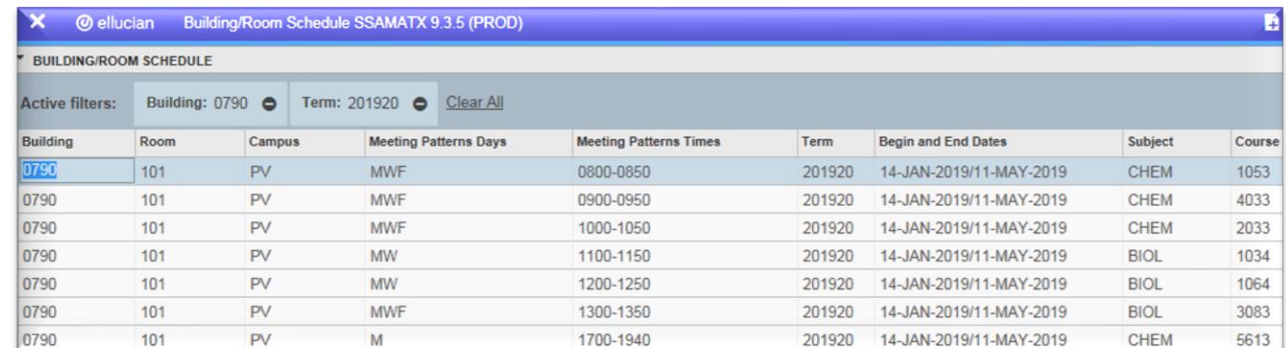


Additional ID:  E-mail:   
 Country Code:  Area Code:   
 Phone Number:

Enter one search criteria (Additional Id,E-Mail,Telephone) and press Press GO to list matching records

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

- ▶ “Table/spreadsheet” like pages
  - ▶ Columns can be reordered/resorted
  - ▶ Filter and export can be powerful tools



Building	Room	Campus	Meeting Patterns Days	Meeting Patterns Times	Term	Begin and End Dates	Subject	Course
0790	101	PV	MWF	0800-0850	201920	14-JAN-2019/11-MAY-2019	CHEM	1053
0790	101	PV	MWF	0900-0950	201920	14-JAN-2019/11-MAY-2019	CHEM	4033
0790	101	PV	MWF	1000-1050	201920	14-JAN-2019/11-MAY-2019	CHEM	2033
0790	101	PV	MW	1100-1150	201920	14-JAN-2019/11-MAY-2019	BIOL	1034
0790	101	PV	MW	1200-1250	201920	14-JAN-2019/11-MAY-2019	BIOL	1064
0790	101	PV	MWF	1300-1350	201920	14-JAN-2019/11-MAY-2019	BIOL	3083
0790	101	PV	M	1700-1940	201920	14-JAN-2019/11-MAY-2019	CHEM	5613



Thank you for using

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Or visit us in the

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