

**Oakton Community College**

**Banner Student  
Basic Navigation Training**

**Published: September 2007**

**Version 1.3**

(Subsequent version to be published as version 1.4)

## Table of Contents

1 OVERVIEW.....	3
2 WHAT IS BANNER.....	3
2.1 HOW DOES BANNER WORK.....	4
2.3 REVIEW .....	4
3 LOG INTO BANNER .....	5
3.1 LOGGING INTO BANNER .....	5
3.2 USER PERMISSIONS .....	6
3.3 GENERAL MENU FORM .....	6
3.4 EXIT BANNER .....	6
3.5 REVIEW .....	6
4 BANNER FORMS.....	7
4.1 GENERAL MENU .....	7
4.2 SYSTEM FORMS MENUS .....	8
4.3 NAMING CONVENTIONS .....	8
4.4 KEY FORM COMPONENTS.....	10
4.4.1 TITLE BAR .....	10
4.4.2 STATUS/ AUTO HINT .....	12
4.4.3 Menu Option .....	13
4.4.43 Tool Bar Options.....	13
4.5 BANNER FORMS .....	14
4.5.1 GENERAL FORMS .....	14
4.5.2 APPLICATION OR INPUT FORMS .....	15
4.5.3 QUERY FORMS .....	16
4.5.4 VALIDATION FORMS .....	17
4.5.5 RULES AND CONTROLS FORMS .....	18
4.5.6 MAINTENANCE FORMS.....	18
4.6 REVIEW .....	18
5 ACCESSING FORMS.....	19
5.1 DIRECT ACCESS FROM THE GENERAL MENU .....	19
5.1.1 DIRECT ACCESS FROM THE GENERAL MENU PRACTICE.....	20
5.2 DIRECT ACCESS FROM THE “Go To” FIELD.....	20
5.2.1 DIRECT ACCESS USING THE “Go To” FIELD PRACTICE.....	20
5.3 DIRECT ACCESS FROM THE FILE MENU.....	21
5.4 FORM OR OBJECT SEARCH FROM FILE MENU .....	21
5.5 REVIEW .....	23
6 ACCESSING DATA WITHIN FORMS.....	23
6.1 KEY BLOCK QUERY.....	23
6.2 REVIEW .....	23
7 HORIZONTAL TOOLBAR.....	25
8 APPENDIX.....	28
A Form Components Quick Reference.....	28
B Keyboard Shortcuts.....	29
9 SUMMARY.....	29

# 1 Overview

This course is designed as a first exposure to Banner. Its goal is to familiarize you with the Banner interface and demonstrate navigation through systems, modules, and forms. What is learned in this training session can be applied to all the Banner System modules and is not specific to one module. The functional training, which will be in great depth and function specific and will provide detailed information on the forms you will use and how to use them. Upon completion of this training session, you will be able to:

- Log into and exit out of Banner
- Demonstrate a basic knowledge of Banner
- Demonstrate a basic knowledge of Banner naming conventions
- Demonstrate a basic knowledge of Banner Keyboard Shortcuts
- Demonstrate use of Banner forms access and query functionality
- Demonstrate use of a Banner queries using wildcards

This course demonstrates the importance of accurate querying and data entry. It will help you understand the importance of accurate Banner data, and the relationship of data among the systems.

## 2 What is Banner

Banner is a comprehensive suite of applications that will integrate individual systems that are used to process data from multiple functional areas. This provides for a reduction in data redundancy by eliminating the need for duplicating input where separate functional areas have data in common. Banner uses rules and validation to ensure the data is entered and accessed correctly. Banner is web-based, easy to learn, efficient and is designed to provide centralized reporting.

Banner, a product of SunGard Higher Education Solutions (Formerly SCT), is used in more than 800 institutions world-wide. Banner is an administrative software system developed specifically for higher education institutions. Banner is the administrative software being implemented at Oakton Community College to maintain student academic and financial data. This system will replace the current Oakstar system and will interface with other administrative software systems including DARS, Powerfaids and Ad Astra.

## **2.1 How Does Banner Work**

Oakton Community College is implementing the Banner Student data system. Everyone who uses Banner shares this common database, thus providing an integrated system where all users see the same data in real time.

The Banner software acts as an interface to the database, making the job of adding and retrieving data much easier. Banner provides features and processing capabilities needed for student finance information (e.g., tuition and fee assessment and payment application), admissions (e.g., self-service admission applications for both credit and non-credit and admission applications for limited enrollment programs), faculty support (e.g., electronic grade submission, permitting and class rosters), and registration and records (e.g. semester course registration, grade processing and transcript issuance).

## **2.3 Review**

Section Two provided a basic overview of what Banner is with the emphasis on the system modules that make up Banner. We learned that Oakton Community College will incorporate the Admissions, Student Finance, Student, Registration and Records, and Faculty Services modules into the Banner implementation. We also know that the systems share common information, which will reduce redundancy and help us maintain accurate records. Next, we will learn the step-by-step procedures of logging into and exiting out of Banner.

### 3 Log into Banner

#### Objectives

Upon completion of this Section, you will be able to:

1. Log into Banner
2. Change your initial password in Banner
3. Exit out of Banner

#### Description

For training purposes, you will log into Banner using this method. After system implementation, Banner users will log into Banner through the Luminis Portal system. This Section will take you through step-by-step procedures of logging into the Banner system and properly exiting the system.

#### Logging into Banner

1. Click on the “My Oakton” oak leaf icon on your desk top.
2. This will bring up the Luminis login page.



Figure 1-Luminis Login Screen

7. Enter the Login ID provided to you in the **Username** field and the password in the **Password** field.
8. Click on the “Login” button.

### 3.2 User Permissions

Banner security may be used to restrict user access to forms. Through your Banner username, you will be given access to specific forms based on your job function. You may have *Update* or *Query* privileges. Update means that you will be given authorization to add, delete, or change the information displayed on the form. Query privileges allow you to browse or view records without changing them.

### 3.3 The General Menu Form

Once you have logged into Banner, the first screen to appear is the Banner **General Menu** form. The General Menu form lets you select systems, modules, menus, and other forms. This form will be discussed in more detail in Section Four.

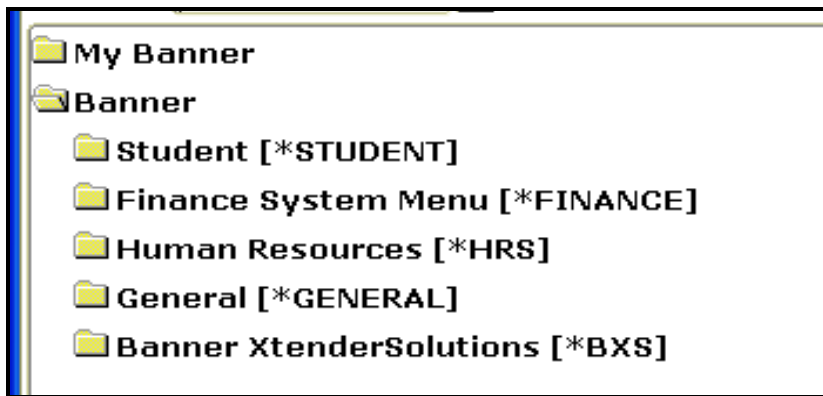


Figure 3-Banner General Menu Form

### 3.4 Exit Banner

To Exit Banner use the **X** on the Banner menu bar. It is very important that you exit Banner in the correct manner. If you exit Banner differently, you risk losing valuable data and information.

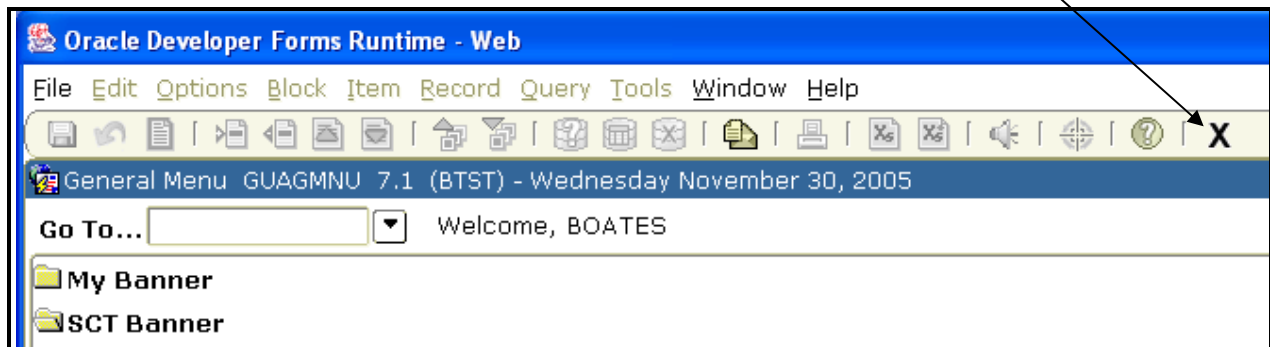


Figure 4 -Exiting Banner

### 3.5 Review

In Section Three, we learned the step-by-step procedures of logging into and out of Banner. It is very important to follow these procedures to prevent errors. To exit out of Banner we need to make sure that we use the white **X** on the Banner General Menu bar. Next, we will discuss Banner forms.

## 4 Banner Forms

### Objectives

Upon completion of this Section, you will be able to:

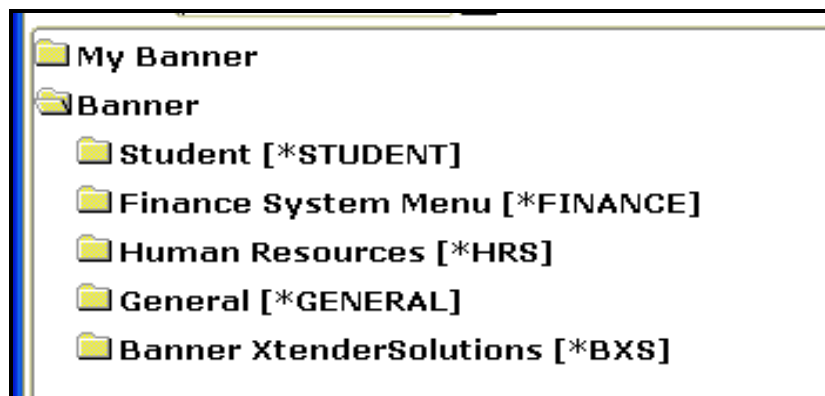
- Understand the General Menu form in Banner
- Understand the System Menus
- Understand Naming conventions in Banner
- Key form components in Banner
- Understand the Banner Tool Bar
- Understand Data Standards for Banner Users
- Identify the types of forms in Banner

### Description

Banner is composed of forms. Forms may be referred to as screens or windows. Think of Banner forms as paper forms. Each form represents a specific body of information, such as a name and address form, registration form, or class schedule form. Like paper forms, Banner's forms can be composed of one or more pages or screens (called "blocks" in Banner). Understanding Banner navigation and the many functions a form has will better help you in retrieving data.

#### 4.1 General Menu

When you have successfully logged into Banner, you see the General Menu. The different Banner systems appear along the left column of the page (Student and General). As you click a system on the left column, the item will expand all of the items available in the currently selected menu.



*Figure 5-General Menu, GUAGMNU*

Each Module has a set of forms attached to it. Each form has a unique name identifier, in Banner these are known as naming conventions. After selecting the primary system and the module owning the form you will see the list of forms that use the Banner naming conventions. To understand the menu and form names you will need to understand the naming conventions.

## 4.2 Student Forms Menu (Example)

Forms are located behind (modules). Click the closed folder sign to expand menu options. Click the open folder sign to collapse menu options. Form names will appear in brackets.

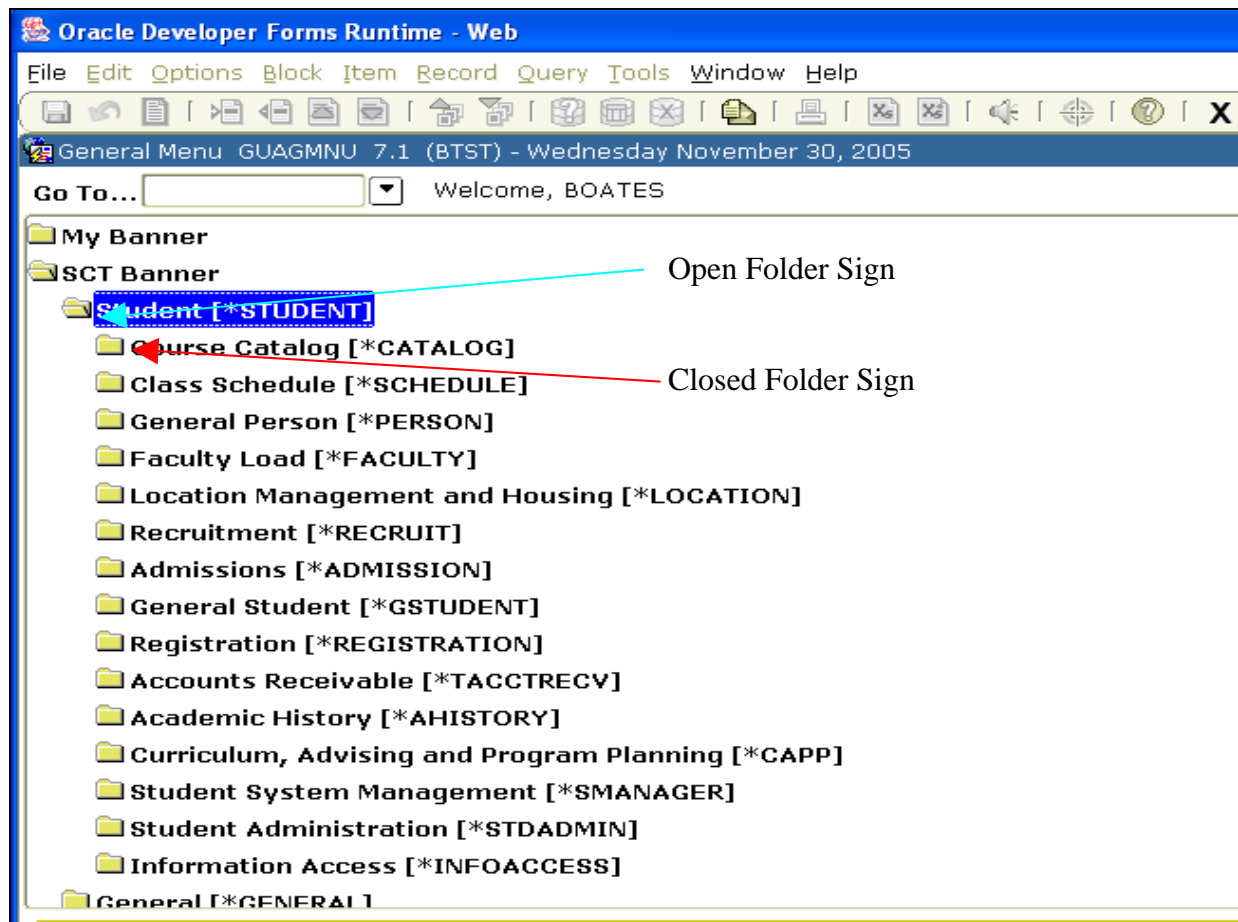


Figure 6 -Student Forms Menu

## 4.3 Naming Conventions

Banner forms, reports, jobs, and tables have seven character names. Each name is unique and the name has an embedded meaning. As shown in the example below, SFAREGS is an application form that belongs to Banner's Student System.

Example 1: **SFAREGS**

Position 1: The Primary Operating System (**S** = Student)

Position 2: The Module within the System (**F** = Registration/Fee Assessment)

Position 3: The Type of Form, Report, Query (**A** = Application)

Positions 4-7: An abbreviation of the form name/usage (**REGS** = Registration screen)

Example 2: **SSAEVAL**

Position 1: The Primary Operating System (**S** = Student)

Position 2: The Module within the System (**S** = Schedule)

Position 3: The Type of Form, Report, Query (**A** = Application)

Positions 4-7: An abbreviation of the form name/usage (**EVAL** = Evaluation)

The following tables provide detailed explanations of each field in a form name and how those characters translate to identify the forms Module and function.

<b>Position 1:</b> Identifies the primary system owning the form, report, job, or table.	<b>A</b> Alumni/Development	<b>L</b> Occupational Tax/Lic.	<b>U</b> Utilities
	<b>B</b> Property Tax	<b>N</b> Position Control	<b>V</b> Voice Response
	<b>C</b> Courts	<b>O</b> Customer Contact	<b>X</b> Records Indexing
	<b>D</b> Cash Drawer	<b>P</b> HR/Payroll/Personnel	<b>W</b> Reserved for client
	<b>F</b> Finance	<b>Q</b> Electronic Work Queue	<b>Y</b> applications that co-exist
	<b>G</b> General	<b>R</b> Financial Aid	<b>Z</b> with Banner
	<b>I</b> Information Access	<b>S</b> Student	
	<b>K</b> Work Management	<b>T</b> Accounts Receivable	

<b>Position 2:</b> Identifies the module owning the form, report, job, or table.	<b>General (G)</b>	<b>Student (S)</b>	<b>Finance (F)</b>
	<b>E</b> Event Management	<b>A</b> Admissions	<b>A</b> Accounts Payable
	<b>J</b> Job Submission	<b>C</b> Catalog	<b>B</b> Budget Development
	<b>L</b> Letter Generation	<b>E</b> Support Services	<b>C</b> Cost Accounting
	<b>O</b> Overall	<b>F</b> Registration/Fee Assessment	<b>E</b> Electronic Data Interchange
	<b>P</b> Purge	<b>G</b> General Student	<b>F</b> Fixed Assets
	<b>S</b> Security	<b>H</b> Grades/Academic History	<b>G</b> General Ledger
	<b>T</b> Validation form/table	<b>I</b> Faculty Load	<b>I</b> Investment Management
	<b>U</b> Utility	<b>K</b> Reserved for SCT Intl.-UK	<b>O</b> Operations
	<b>X</b> Cross product	<b>L</b> Location Management	<b>P</b> Purchasing/Procurement
	<b>Accounts Receivable (T)</b>	<b>M</b> CAPP	<b>R</b> Research Accounting
	<b>F</b> Finance Accounts Receivable	<b>O</b> Overall	<b>S</b> Stores Inventory
	<b>G</b> General Accounts Receivable	<b>P</b> Person	<b>T</b> Validation form/table
	<b>O</b> Overall	<b>R</b> Recruiting	<b>U</b> Utility
	<b>S</b> Student Accounts Receivable	<b>S</b> Schedule	<b>X</b> Archive/Purge
	<b>T</b> Validation form/table	<b>T</b> Validation form/table	
	<b>U</b> Utility	<b>U</b> Utility	
	<b>Financial Aid (R)</b>	<b>HR/Payroll/Personnel (P)</b> <b>Position Control (N)</b>	<b>Alumni/Development (A)</b>
	<b>B</b> Budgeting	<b>A</b> Application	<b>A</b> Membership
	<b>C</b> Record Creation	<b>B</b> Budget	<b>D</b> Designation
	<b>E</b> Electronic Data Exchange	<b>C</b> COBRA	<b>E</b> Event Management
	<b>F</b> Funds Management	<b>D</b> Benefit/Deductions	<b>F</b> Campaign
	<b>H</b> History and Transcripts	<b>E</b> Employee	<b>G</b> Pledge and Gift/Pledge Payment
	<b>J</b> Student Employment	<b>H</b> Time Reporting/History	
	<b>L</b> Logging	<b>O</b> Overall	<b>M</b> Prospect Management
	<b>N</b> Need Analysis	<b>P</b> General Person	<b>O</b> Organization
	<b>O</b> Common Functions	<b>R</b> Electronic Approvals	<b>P</b> Constituent/ Person
	<b>P</b> Packaging & Disbursements	<b>S</b> Security	<b>S</b> Solicitor Organization
	<b>R</b> Requirements Tracking	<b>T</b> Validation/rule table	<b>T</b> Validation form/table
	<b>S</b> Student System Shared Data	<b>U</b> Utility	<b>U</b> Utility
	<b>T</b> Validation form/table	<b>X</b> Tax Administration	<b>X</b> Expected Matching Gift
	<b>U</b> Utility		<b>I</b> Information Access
			<b>S</b> Student
			<b>R</b> Financial Aid
	<b>All Products W</b> Reserved for client forms or modules used within a Banner2000 application <b>Y</b> (character in position 1 does not equal W, Y, or Z) <b>Z</b>		

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

Figure 7 - Naming Conventions Position's 1, 2 & 3

**Positions 4, 5, 6, and 7:** An abbreviation of the form name/usage (**Eval** = Evaluation)

#### 4.4 Key Form Components

All Banner forms are displayed with a **title bar**, a **status bar**, a **menu bar**, and a **tool bar**. One of the most important parts of the form is the status bar. All form menus are arranged hierarchically.

##### 4.4.1 Title Bar

The **title bar** appears at the top of each window with the name of the window or form. The buttons to the right of the title bar are standard Windows controls for resizing or closing the window.

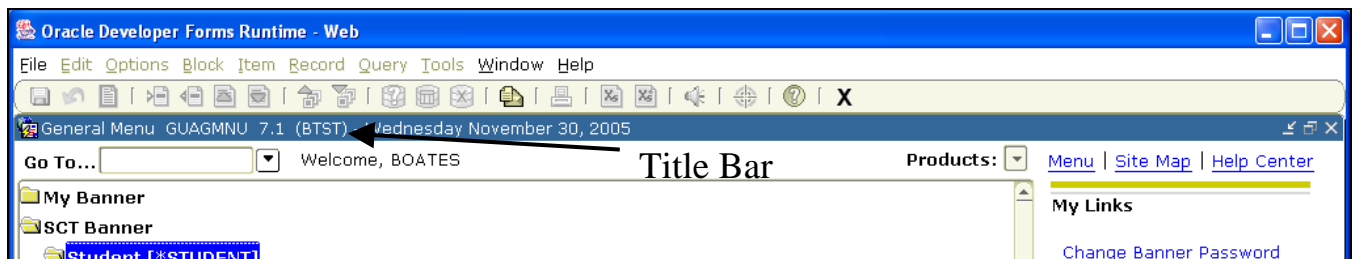


Figure 8A-Anatomy of Banner Form Title Bar



### 4.43 Menu Option

The **menu bar** allows for menu driven access to various functions within Banner. Click a menu item on the menu bar to reveal the menu options, and click an option to select it. You can also access a menu using keyboard shortcuts. By typing the “alt” key plus the underlined letter on the menu item you can open that menu. You can then use the arrow keys on the keyboard to select the desired menu item and press “Enter” to select it.

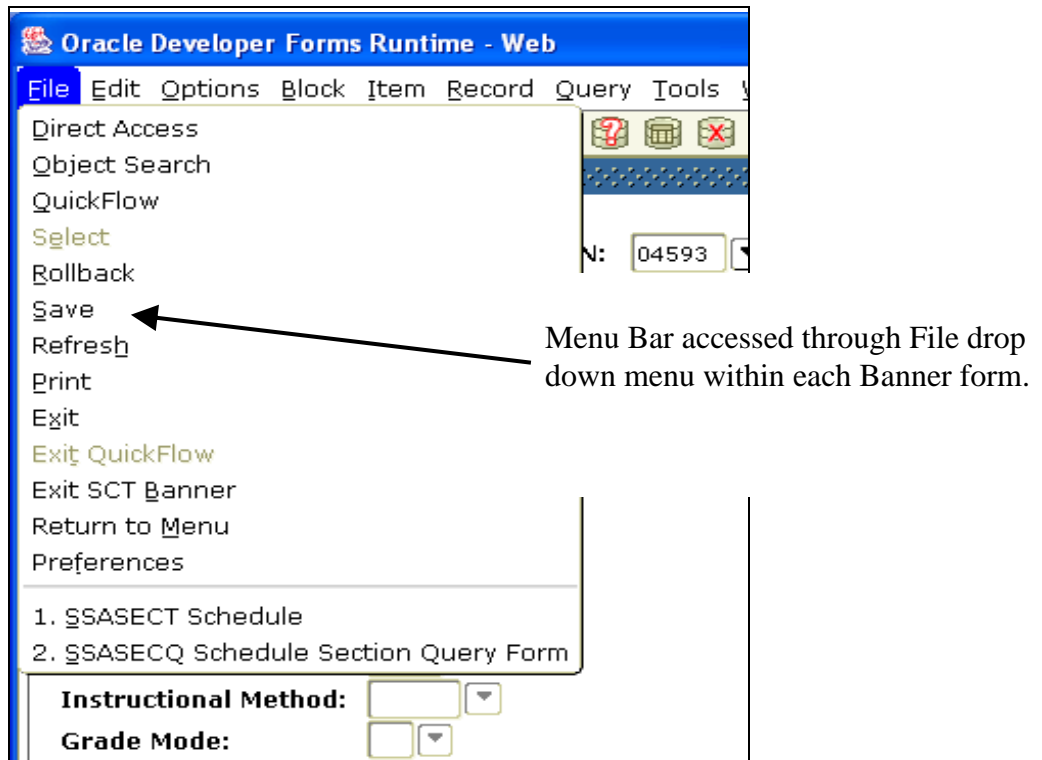


Figure 8C Menu Option

### 4.43 Tool Bar Option

The **tool bar** allows for icon driven access to various functions within Banner. The icons represent functions within the Banner forms that are also available on the Menu Bar. (Each individual Icon will be covered in section ### of this document.)

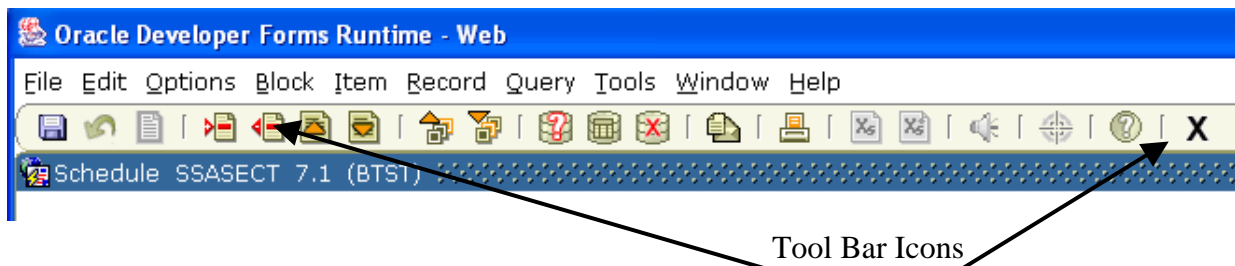


Figure 8D Tool Bar Option

## 4.5 Banner Forms

There are six types of forms in Banner. Within the six types there are multiple forms with different names.

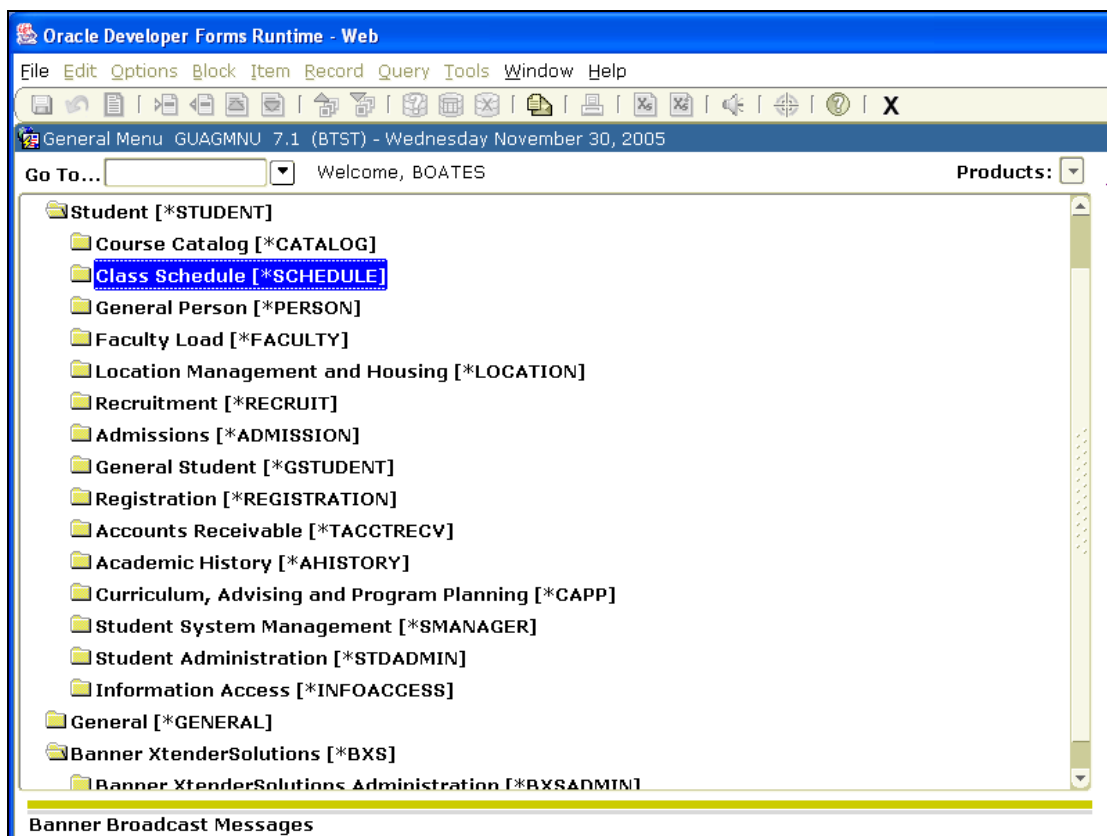
The six types of forms are:

1. General forms
2. Application or Input forms
3. Query forms
4. Validation forms
5. Rule and Control forms
6. Maintenance forms

### 4.5.1 General Forms

General Forms are forms that can be accessed by all systems and all users. There are many General Forms but one that you will use most often which is the General Menu Form.

The General Menu Form as seen below contains the system menus that may be expanded or collapsed to view modules and forms associated with them.



*Figure 9- General Menu form  
Example: GUAGMNU*

## 4.5.2 Application or Input Forms

An Application Form may be used to input data, to update data for an existing record or to query and view data. Application or Input forms have a header area called a **key block**, for query parameter input.

Example 1: SPAIDEN. SPAIDEN is a General Person Identification form which is used to collect and maintain biographic information about people entered in Banner. **Person** records are created for anyone, or anything, which has a relationship with the college as a student, faculty member or business entity. (An individual must be created as a person in Banner before they can be created as a student.)

The “Telephone” information/update form is used to collect and maintain telephone contact information on people at the college.

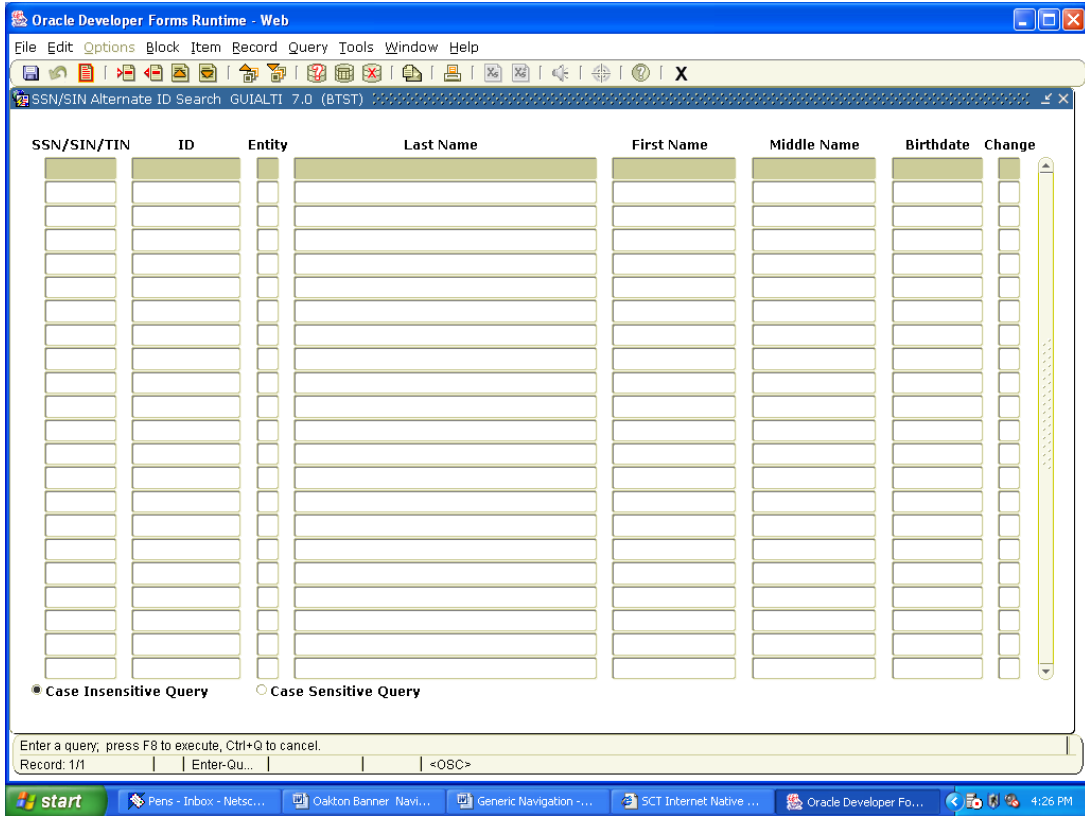
The screenshot shows the Oracle Developer Forms Runtime - Web interface for the SPAIDEN form. The main window title is "General Person Identification SPAIDEN 7.0.0.1 (BTST)". The form is currently displaying the "Telephone" tab. The header area shows the ID "B01427074" and the name "Oates, Britian T.". Below the header, there are tabs for "Current Identification", "Alternate Identification", "Address", "Telephone", "Biographical", "E-mail", and "Emergency Contact". The "Telephone" tab is active, showing three telephone records. Each record has fields for "Telephone Type", "Telephone", "International Access", "Comment", "Address Type", "Sequence", "Activity Date", and "User". The first record is a "Permanent" telephone with the number "815 - 6278331", marked as "Primary". The second record is an "Emergency Contact" telephone with the number "815 - 1530795". The third record is a "Billing" telephone with the number "847 - 6351991". The form also includes a "Generate ID" button and a "Telephone number extension" field at the bottom.

*Figure 10- General Person Identification Form  
Telephone Information Query/Maintenance*

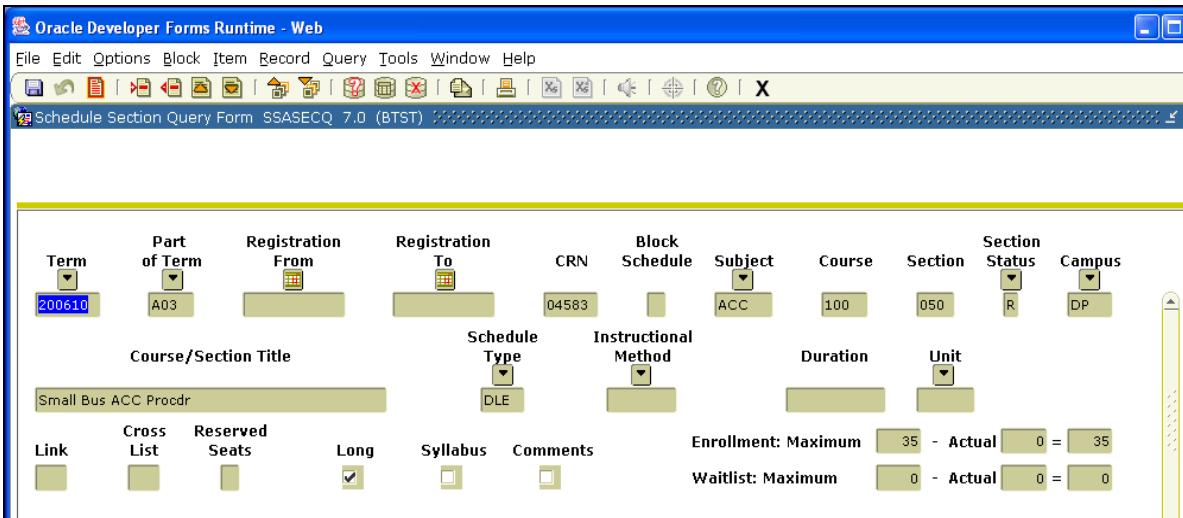
### 4.5.3 Query Forms

A Query Form allows the user to search for existing records. Query forms are searchable by field. To search for a record, you supply information to Banner to identify the desired record, and then execute a search for the record.

*Example 1: GUIALTI*



*Figure 11a – Query Form  
SSN/SIN Alternate ID Search*



*Figure 11B-Query Form  
Schedule Section Query Form*

## 4.5.4 Validation Forms

Validation Forms display tables that contain values for input. They may be used to supply pre-defined values for an input form. Validation forms display all table data by default. Specific values may be displayed by accessing valid data values on the pull down menus within the application forms.

*Example 1: SSASECT-Grade Mode Validation Table Values*

**Section Details**

Term: 200610 CRN: 04583

**Subject:** ACC Accounting  
**Course Number:** 100 **Title:** Small Bus ACC Proodr  
**Section:** 050  
**Cross List:**  
**Campus:** DP Des Plaines  
**Status:** R Reserved  
**Schedule Type:** DLE Discussion/Lecture  
**Instructional Method:**  
**Grade Mode:** S Standard Letter  
**Session:**  
**Special Approval:**  
**Duration:**  
**Part of Term:** A03 18-JAN-2006 11-MAY-2006 16

**Registration Dates:** First Last  
**Start Dates:**  
**Maximum Extensions:** 0

Long Title  Comments  Syllabu

**Section Grading Mode Query**

Find: %  
... Description  
A Audit  
S Standard Letter

Find OK Cancel

Grade Mode	Description	Credit Hours
N		3.000
		3.000
		3.000
		3.000

**Other:**  
**Link Identifier:**

**Grade Mode Validation Table Entries**

**Default Registration Grade Mode**

*Figure 12A-SSASECT Section Creation and Maintenance Form*

## 4.5.5 Rules and Control Forms

Rules and Control forms facilitate Banner data processing. They allow the input of parameters for the extraction of data and the execution of standard Banner and customized reports.

*Example: GJAPCTL (Process Submission Controls Form)  
with parameters for a Schedule of Classes Report.*

Number	Parameters	Values
01	Schedule Term	200620
02	Part-of-term (% for all)	%
03	Order 1-Subj, 2-Coll,Div,Dept	2
04	Campus (% for all)	%
05	Course Status (% for all)	%
06	Use Scheduler Results	N
07	Schedule Type (% for all)	%
08	Instructional Method (%=all)	%

LENGTH: 6 TYPE: Character O/R: Required M/S: Single

Save Parameter Set as    Name:    Description:     Hold     Submit

Special Print Instructions; if left blank the default format is Landscape.  
Record: 1/1    ...    <OSC>

*Figure 13 GJAPCTL (Process Submission Controls Form)*

## 4.6 Review

In this section, we learned about the different Banner Forms. We looked at the General Menu Form and its components. We identified the menu options in Banner and worked through naming conventions. Next, we will look at accessing Banner Forms.

## 5 Accessing Forms

**Objective :** Upon completion of this Section, the user will be able to:

1. Identify the key methods of accessing Banner forms
2. Understand how to Query Data within forms
3. Find Keyboard Shortcuts in Banner

### Description

There are five main methods of searching for forms.

1. Direct Access
2. Direct Access from a form
3. Direct Access using menus
4. Form or Object Search
5. General Person or Entity Search

#### 5.1 Direct Access from the General Menu

To access forms from the General menu, double click on the system (i.e. Student). Next click to select the module (i.e. Class Schedule). Select the form and double click or, click once on the form name and press the enter key.

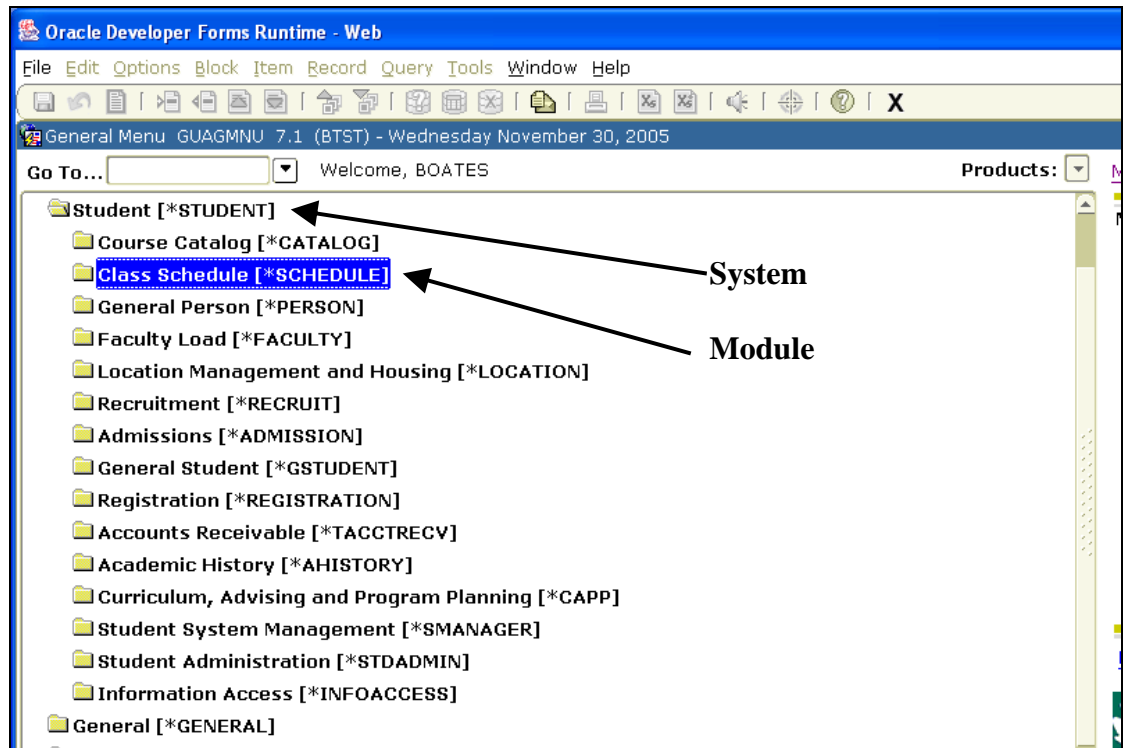


Figure 14 GUAGMNU (General Menu)

### 5.1.1 Direct Access from the General Menu (Practice)

1. Go to the General Menu form, GUAGMNU (If you see the form listed above continue to step 2)
2. Click the + to expand the Student System Menu
3. Click the + to expand the Class Schedule Module
4. Double-click to open SSASECT
5. Click the white X within the tool bar of the form to close the form
6. GUAGMNU will be displayed
7. Click the - to collapse the Student modules and forms
8. Click the - to collapse the Student System Menu

### 5.2 Direct Access Using the “Go To” Field

To search for a form using the Go To Field you need to know the name of the form. You enter the form name in the **Direct Access** field and press **Enter**. An example of a Student Identification form would be SPAIDEN.

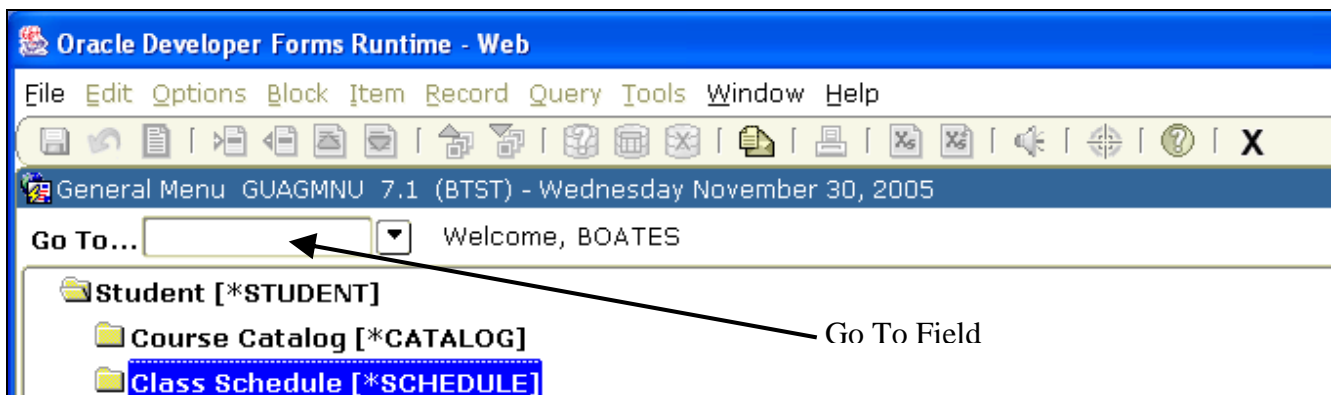


Figure 15-Go To Field Search

#### 5.2.1 Direct Access using the Direct Access field (Practice)

1. Go to the General Menu form, GUAGMNU (If you see the form listed above continue to step 2)
2. Click the Go Direct Access text box
3. Enter the form name SCACRSE
4. Press Enter key
5. SCACRSE will be displayed
6. Click the white X within the tool bar of the form to close the form
7. GUAGMNU will be displayed

### 5.3 Form or Object Search from File Menu

Use form or object search when you know part of the name of the form. For example, you suspect that it contains **FSTV**. A “wildcard” can be used to substitute for unknown characters. There are two wildcards, \_ (underscore) is used to substitute for one character, % (percent sign) is use to substitute for one or more characters. In training we will use both.

Hints for use of the wildcard include using it before and after entries. For example, query on **%STVM%** for an entry that contains the letters **STVM** in the form name.

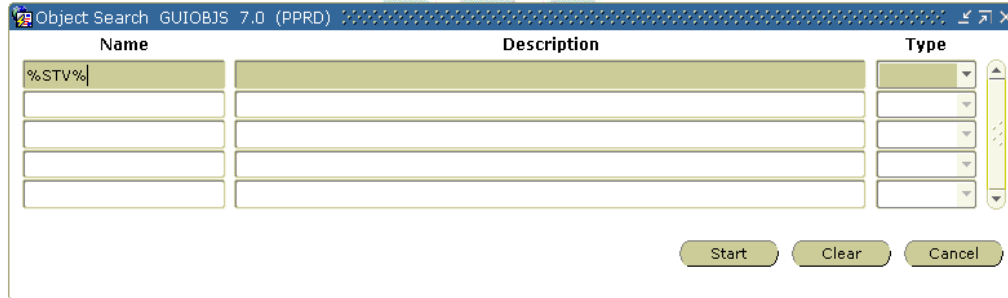


Figure 16-GUIOBJJS Object Search Form

### 5.4 Form or Object Search from General Menu Form

- 1) Select the magnifying glass to start **Object Search**

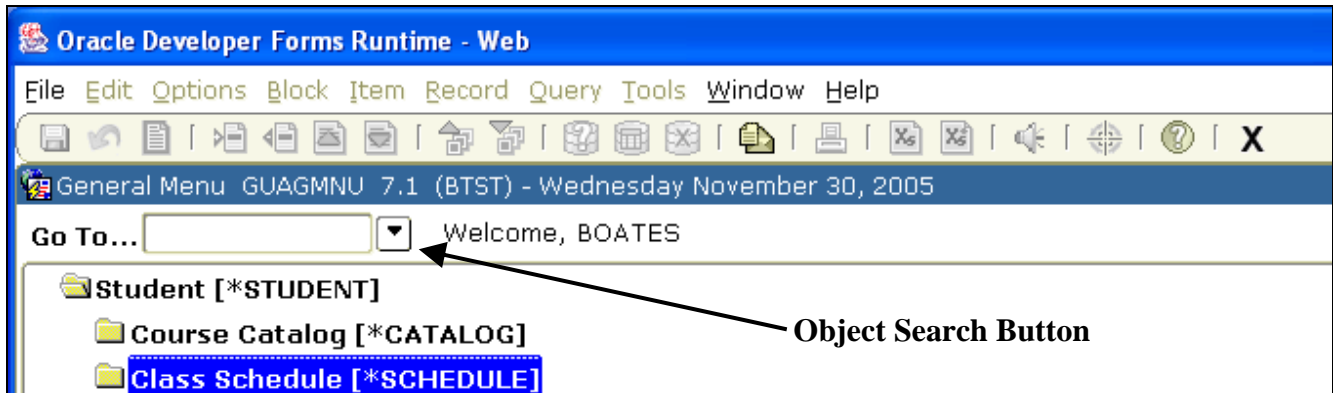


Figure 17 GUAGMNU General Menu Object Search Button

- 2) Enter the search criteria information

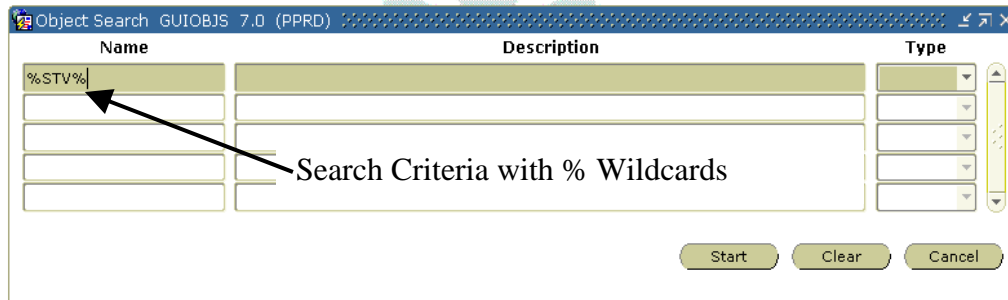


Figure 18-GUIOBJJS Object Search Form with %STV% Search

3) In the description section type **%STV%**

4) Use **F8** function key or select **Execute** from Query pull down menu to generate search

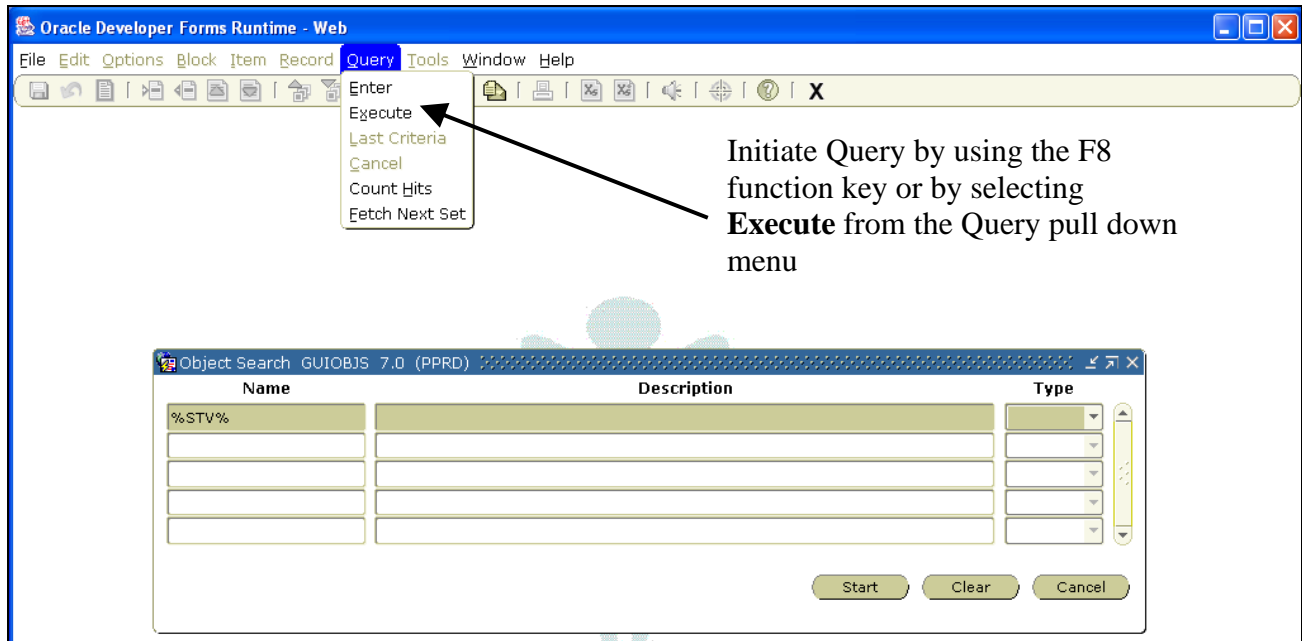


Figure 19 GUIOBJ form

5) Highlight a form you would like to view and choose **Start**

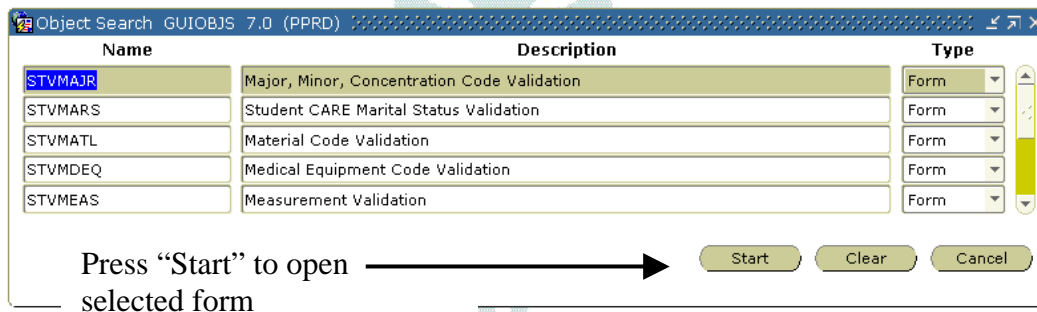


Figure 20-GUIOBJ Object Search Example 1: %STV% results

1) Press "Clear" to remove data appearing in the Query to restart a search or "Cancel" to exit the Object Search form.



Figure 21-GUIOBJ Object Search Example 1: %STV% results

## 6 Accessing Data Within a Form

Once a form has been opened, the user must enter “Key Block” information to access data. The “Key Block” appears at the top of each screen and must be filled in by either direct entry or query.

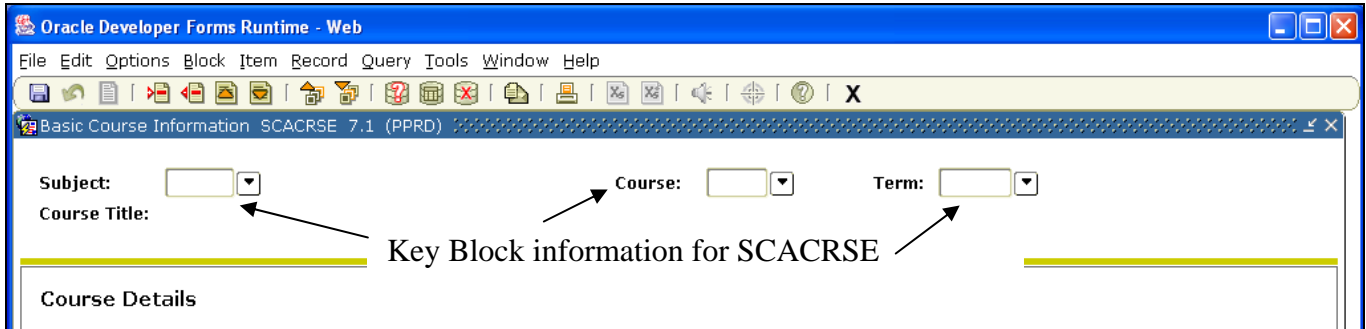


Figure 22 SCACRSE Key Block Information

### 6.1 Key Block Query

Key Block information can be queried by pressing the Object Search Button next to the Field Name. A list will appear providing either a list of valid entry codes or a query function.

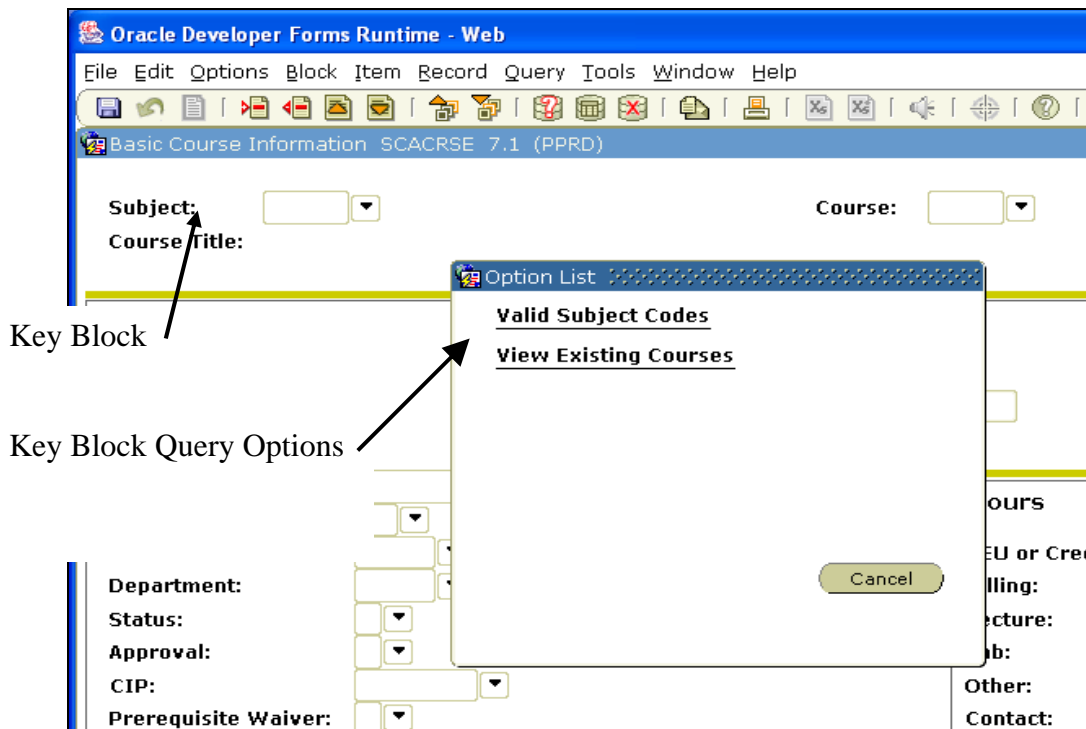


Figure 23 SCACRSE Query Option

Subject Validation (STVSUBJ)

Find%

Code	Description	VR Msg	Activity Date
0000	Undeclared		31-MAR-2005
ACC	Accounting		15-NOV-2005
ACH	Architecture		15-NOV-2005
AGM	Intro To Commodity Futures Tra		15-NOV-2005
AHR	Air Cond, Heating & Refrig Tec		15-NOV-2005
AIR	Air Cond, Heating & Refrig Tec		28-NOV-2005
ALH	Allied Health		28-NOV-2005
ANT	Anthronology		15-NOV-2005

Find OK Cancel

Figure 24 Valid Subject Codes

Existing Courses

Find%

Subject	Course	Effective T...	Title
ACC	100	200610	Small Bus ACC Prod
ACC	141	200610	Prin Of Acctg I
ACC	142	200610	Prin Of Acctg II
ACC	144	200610	Cmp Spr Appl Fin/a
ACC	151	200610	Prin Fin ACC Part I
ACC	152	200610	Prin Fin ACC Part II
ACC	153	200610	Prin Financial ACC
ACC	154	200610	Prin Mangerial Acct
ACC	163	200610	Computer ACC App
ACC	164	200610	Cmp Spr Appl Fin/a

Find OK Cancel

Figure 25 Existing Courses List

Once Key Block information is entered, the form will be populated with the requested data. Once Key Block information is entered, that information is stored in memory and will populate Key Block information as needed as you move from screen to screen.

## 7 Horizontal Toolbar

The horizontal toolbar allows for icon-driven access to various features and functions in Banner. Below is a layout of the standard icon buttons on the horizontal toolbar:

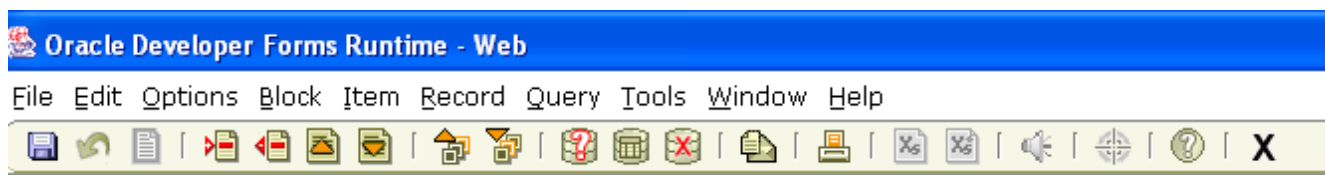


Figure 26 Banner Tool Bar

## Tool Bar Reference Guide



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

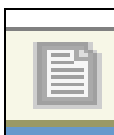


**ROLLBACK**

*Application and inquiry forms:* Clears all information (except key information) and returns you to the first enterable field in the key block.

*Validation forms:* Returns you to the first enterable field on the form.

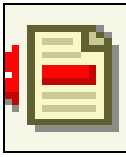
*Query forms:* Returns you to the first enterable field on the calling form



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



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



**REMOVE RECORD** Removes all information for the current record. When you save, the removed information is deleted.



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



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



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



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



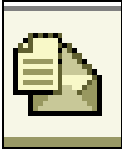
**ENTER QUERY** Puts the form into query mode so you can enter search criteria to see what information is already in the database.



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



**CANCEL QUERY** Cancels the query and takes the form out of query mode.



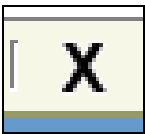
**VIEW/SEND MESSAGES** Allows user to send and receive messages.



**PRINTER** Enables printing.



**ON-LINE HELP**



**EXIT From Forms and windows**

Exits user from the form or window only, the previous form will be displayed.

*From Main menu* **Exits you from Banner.**

*From Query mode*  **Cancels the query and takes the form out of query mode.**

# Appendix

## A. Form Components Quick Reference

<i>Terms</i>	<i>Definition</i>
Auto Hint Line	Displays a brief field description, error and processing messages and keyboard equivalents.
Blocks	A block is a section of a form or window that contains related information.
Branch Window	Any window on the form which is not the Root Window, Dialog Box, or Alert Box. A form may have multiple windows that can be accessed in several different ways depending on the type of window designed. A common way is by using the NEXT BLOCK function. <b>NAVIGATION ALERT:</b> If the Branch Window Title Bar has the same form name as the one on the Root Window, the EXIT function will cause you to exit from the form.
Exit	Click on the X icon near the top right of the window or press <b>CTRL Q</b> .
Information Area	An area on a form that contains related information. A form may have more than one block. A block may be separated by a "Block Title", or by a solid line. Using Next Block or Previous Block functions controls navigation between blocks. These are activated by clicking in the first data enterable field in the area, choosing the appropriate icon, or selecting the block options from the block menu.
Key Block	The first block contains key information. The key block determines what is entered or displayed on the rest of the form (i.e. the student's information).
Key Information	The first block on many BANNER forms. The information keyed into this area is the deciding factor for what will be displayed in the rest of the form. Since the key is one of the most basic elements on a form, it is always displayed. On forms that have more than one window, subsequent windows are displayed beneath the key which remains static. When the cursor is in the key block, the enterable fields are enabled; once you've moved the cursor to another area, the enterable fields in the key are disabled.
Next Block	To move from the key block to the next block, click in the first field of the next block, use <b>CTRL PGDN</b> or use NEXT BLOCK button. <b>CTRL PGUP</b> returns you to the previous block.
Rollback	Clears all information (except the key block) and returns you to the first enterable field in the key block.
Status Line	Indicates record number, List of Values or query mode
Window Pane	Areas of a form that have more columns than can appear in a window at one time. A Horizontal Scroll Bar appears underneath a windowpane.

## B. Keyboard Shortcuts

Below is a list of function keys if you prefer these to using the mouse. Clicking on the “Show Keys” icon on the toolbar will also give this to you. In the Banner System, it is very important that you use the keyboard shortcuts and not rely on the mouse functions as data may be lost or deleted when using the mouse.

Key	F1	F2	F3	F4	F5	F6	F7	F8	F9	F10
	Help		Duplicate Field/Item	Duplicate Record		Insert Record	Enter Query	Execute Query	List	Save
<b>Shift</b>	Display Error	Count Query Hits	Select	Clear Record	Clear Block	Remove Record	Rollback	Print		
<b>Ctrl</b>	Show Keys									

Key	q	Page up	Page down	Esc	Tab	p	l	Left Mouse double-click	Up Arrow	Down Arrow
				Cancel	Next Field			On date field=calendar On amount field=calculator On LOV field=LOV	Previous Record	Next Record
<b>Shift</b>					Previous Field			Dynamic Help		
<b>Ctrl</b>	Exit or Cancel Query	Previous Block	Next Block		Next Field	Record Scroll Up	Record Scroll Down			

Figure 27 – Keystrokes

## Summary

Banner is a comprehensive suite of applications that will integrate individual systems that are used to process data from multiple functional areas. This course was designed as a first exposure to Banner. Its goal was to familiarize you with the Banner interface and demonstrate navigation through the modules. Forms and Queries classes for each system will introduce you to moving through forms, generating queries, and get more familiar with techniques used specifically for that system. What you learned in this class can be applied to all the Banner Systems and is not specific to one system. The functional training, which will be in great depth and system specific, will give detailed information on the forms you will use and how to use them.