BANNER 7.2

Navigation Reference Manual

NORTH CAROLINA CENTRAL UNIVERSITY
FOUNDED 1910
INFORMATION TECHNOLOGY SERVICES

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Introduction

BANNER is an administrative software application developed specifically for higher education institutions. BANNER consists of five integrated systems, Finance, Human Resources, Student, Financial Aid and Advancement. Each of these five modules share a common database (general) making it easy for North Carolina Central University to maintain and share records. BANNER uses a software package called ORACLE to store and manage data and organize data into a database.

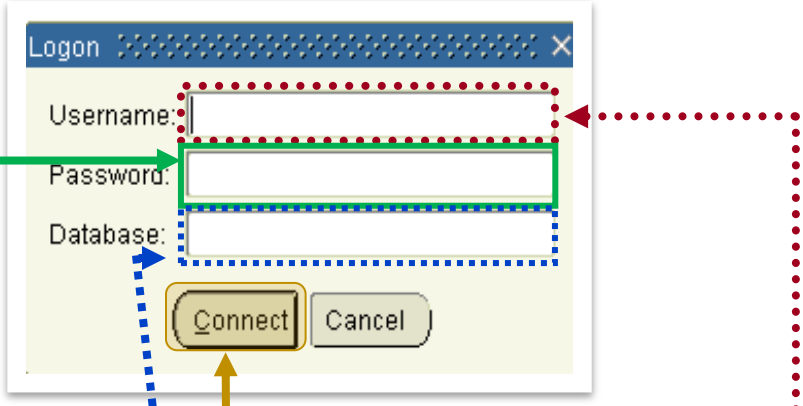
You must have a computer account to access BANNER. This account identifies you, and your Banner Security Role regulates what you have permission to do on the computer system. Complete a Banner Access Request form (found on the NCCU.edu web site for Document Library) to obtain a BANNER account and security role.

Your account has a unique name referred to as the username. Your account is also protected by passwords. Passwords are security measures to prevent others who may know your username from using your account.

Do not let anyone know your passwords for any computer system! If you believe someone may know your password, change it at once. An individual who shares his or her ID and password is responsible for any transactions, whether willful or accidental, entered into the Banner Finance system.

Resetting forgotten passwords can be requested through Information Technology Services by calling the Help Desk at 7676.

Logon Window



At the Logon window **Enter Your Banner ID In The Username Field**.

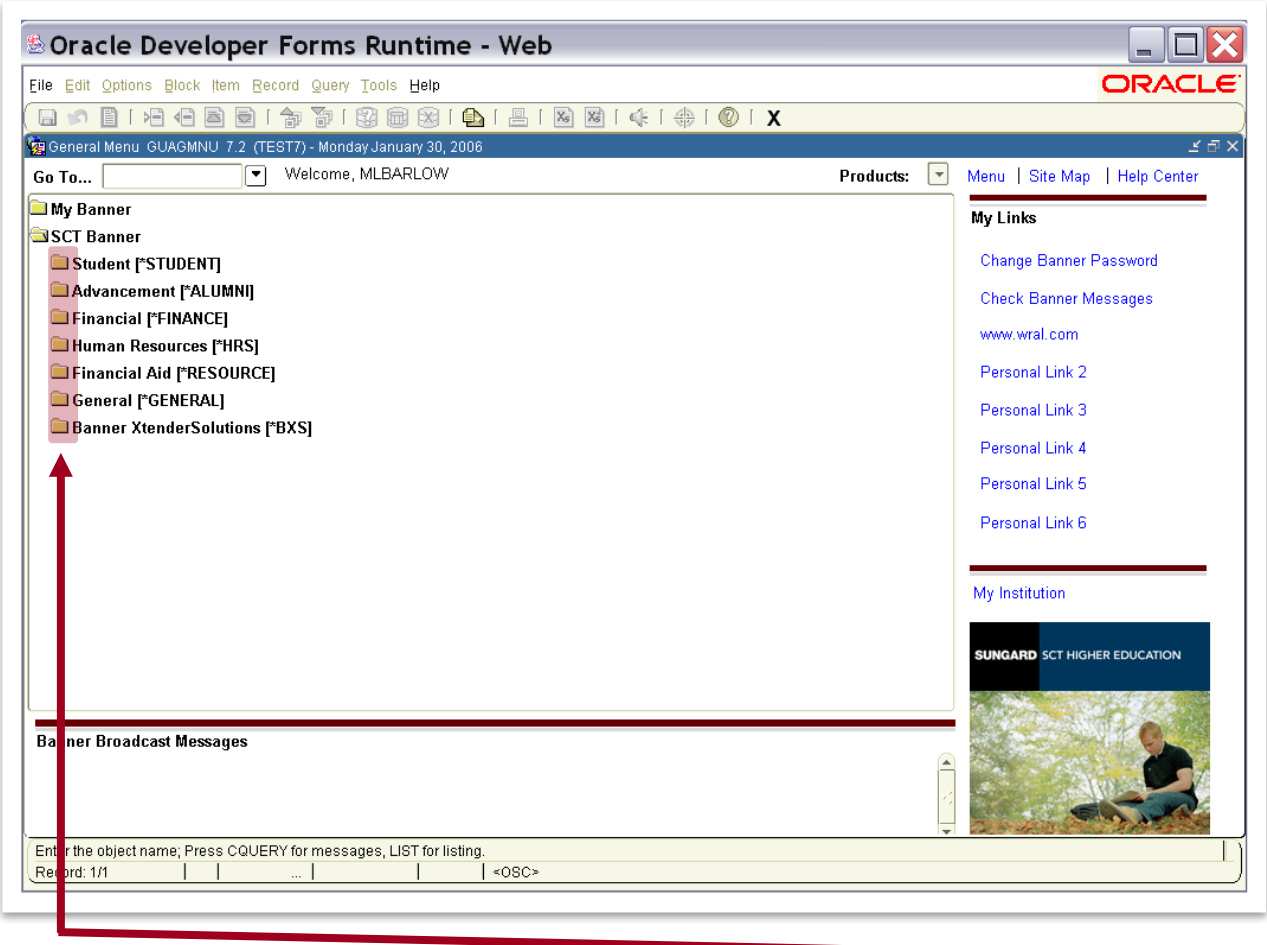
Press Tab Key (not the ENTER key) or use your mouse to **Move To The Cursor To The Password Field** and enter your Banner password.

Leave The Database Field Blank and you will be automatically pointing to the production instance of Banner.

Click On Connect or press the ENTER key and the SCT Banner main menu form will appear.

If you experience difficulties logging in to Banner or forget your password please contact the ITS Help Desk at 7676.

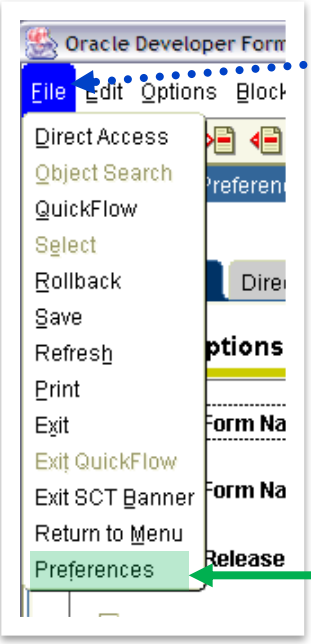
Main Menu



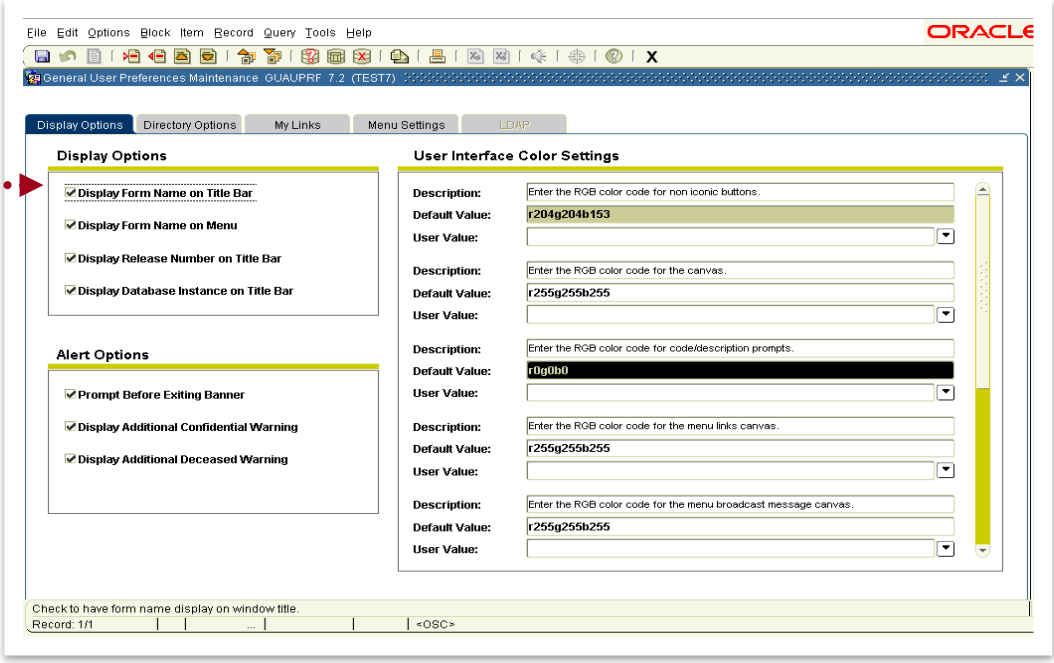
The Main Menu will be displayed after successfully logging into Banner. This form is the entry point for navigation through the Banner system, and provides menus of forms and jobs available in Banner. You can double click on any closed folder to see an expanded menu. Double click on the open folder to collapse the menu.

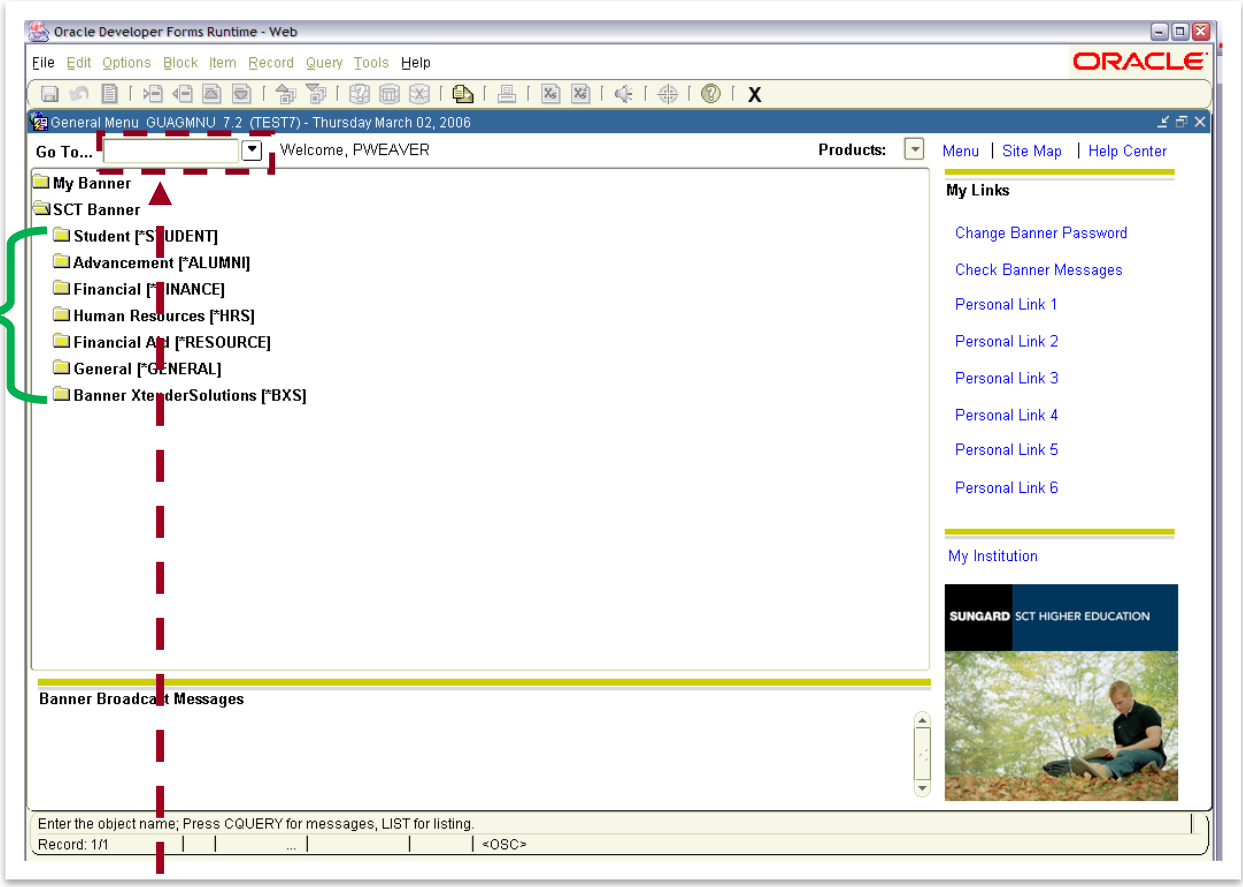
Banner Preferences

There are a number of preferences you may choose in Banner. To see these preferences click on **File** in the tool bar then click on **Preferences** and you will see the form below.



Make sure the option for **Display Form Name on Menu** is selected. **Click OK**. In order for your preference to be displayed you must logout of Banner and log back in to Banner.





Direct Access - If you know the seven-character form name, you can type the form name in the **Go To…** Field to quickly go to that form.

Alternate method

Menu Option – You can double click on the form name to access the form.

Form Name Conventions

Banner forms have seven-character names with the following structure:

Position 1 – Identifies the primary system that owns the form, report or table

- **A** Advancement (Alumni)
- **F** Finance
- **G** General
- **N** Position Control
- **P** Human Resources
- **R** Financial Aid
- **S** Student
- **T** Accounts Receivable

Position 2 – Identifies the module owning the form, report or table

STUDENT (S)	FINANCE (F)	FINANCIAL AID (R)
A Admissions	**A** Accounts Payable	**B** Budgeting
C Catalogue	**B** Budget Development	**C** Record Creation
E Support Services	**C** Cost Accounting	**E** Electronic Data Exchange
F Registration/Fee Assessment	**E** Electronic Data Exchange	**F** Funds Management
G General Student	**F** Fixed Assets	**H** History and Transcripts
H Grades/Academic History	**G** General Ledger	**J** Student Employment
L Location Management	**N** Endowment Management	**L** Logging
M CAPP	**O** Operations	**N** Need Analysis
O Overall	**P** Purchasing/Procurement	**O** Common Functions
P Person	**R** Research Accounting	**P** Packaging & Disbursements
R Recruiting	**S** Stores Inventory	**R** Requirements Tracking
S Schedule	**T** Validation Form/Table	**S** Student System Shared Data
T Validation Form/Table	**U** Utility	**T** Validation Form/Table
U Utility	**X** Archive/Purge	**U** Utility
ACCOUNTS RECEIVABLE (T)		**GENERAL (G)**
F Finance Accounts Receivable		**E** Event Management
G General Accounts Receivable		**J** Job Submission
O Overall		**L** Letter Generation
R Research Accounting		**O** Overall
S Student Accounts Receivable		**P** Purge
T Validation Form/Table		**S** Security
U Utility		**T** Validation Form/Table
		U Utility

Position 3 – Identifies the type of form, report or table.

A	Application (input or update)
I	Inquiry (read only)
M	Maintenance
P	Process
R	Rule Table/Repeating Table/Report process
Q	Query (access from another form)
V	Validation Form / Table View

Position 4 through 7 - Unique four characters identifying the form, report or table.

Examples:

FOIDOCH – F Finance**, O** overall, **I** Inquiry**, DOCH** Document History

FPAPURR – F Finance, **P** Purchasing, **A** Application, **PURR** Purchase Order Creation

FGIBDST – F Finance, **G** General Ledger, **I** Inquiry, **BDST** Budget Status

SPAIDEN – **S** Student, **P** Person, **A** Application, **IDEN** Identification

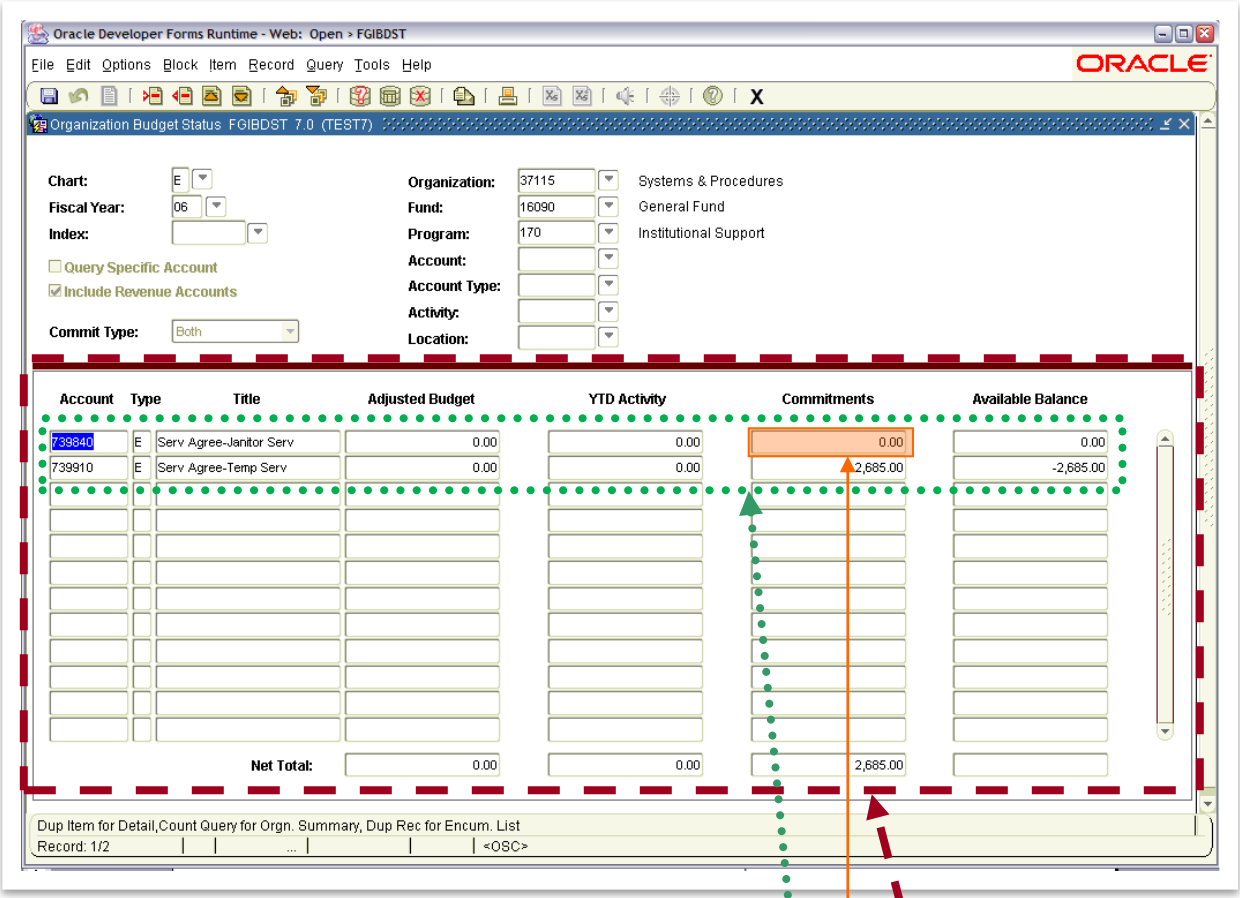
SHRROLL – **S** Student, **H** Grades/Academic History, **R** Report, **ROLL** Grade Roll

STVSTAT – **S** Student, **T** Validation form/table, **V** Validation form/table, **STAT** State/Province Code

How Banner Forms are Organized

To accomplish a task in Banner, you use a Banner **Form.**

Note: To query a FOAPAL budget, use form FGIBDST



Each Banner form contains one or more **Pages** of data.

Each section of a Banner form (or page) contains one or more **Blocks** of data.

The Blocks of Banner forms may contain one or more **Records**

The data in Banner Blocks and Records are contained in **Fields.**

Using the Menu Bar

The menu bar contains a list of pull-down menus that help to navigate the system. If the menu title is disabled (gray) this menu title cannot be accessed on the form.

File – This pull-down menu contains a list of the last ten (10) forms you have accessed.

Edit – This pull-down contains tools that allows you to cut, copy, paste text or forms.

Options – This pull-down menu contains tools that can take you outside the current form or to other blocks within the current form.

Block – This pull-down menu contains tools used to navigate between blocks of information in each form.

Item – This pull-down menu contains tools to navigate to the next record, previous record, duplicate
selection or clear selection.

Record – This pull-down menu contains tools used to navigate between records, and to duplicate, clear or remove records.

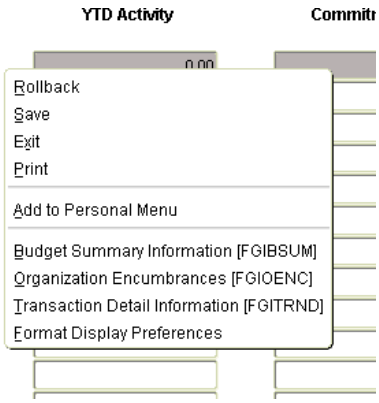
Query – This pull-down menu contains tools used to enter, execute or cancel queries.

Tools - This pull-down menu contains SCT BANNER Xtender Solutions and SCT Workflow.

Help – This pull down contains tools for displaying information about the form. It also has a calendar, calculator.

Alternate Methods: To access a pull-down menu using the keyboard, hold down the Alt key while pressing the key that represents the underlined character in the menu name. Example: [ALT O] will access the Options menu. You can continue accessing additional choices within the menu by using the same method.

On some forms you can right click on the mouse and an options box will appear on the form.



Using the Toolbar

Toolbars are one of the easiest ways to navigate and perform common Banner functions. When the mouse pointer is moved onto one of the graphical buttons, a yellow square appears with text that describes its function.

SAVE - Saves all the changes entered since the last time you saved. **Keyboard [F10]**

ROLLBACK – Clears all information and returns you to the first enterable field in the key block. **Keyboard Shift [F7]**

SELECT – Returns you to the previous form and enters the selected value into the field that called the form. **Keyboard Shift [F3]**

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

DELETE RECORD – Removes all information for the current record. When you **Save**, the removed information is deleted. **Keyboard Shift [F6]**

ENTER QUERY – Puts the form into query mode, criteria can be entered to search information already in the database. **Keyboard [F7]**

EXECUTE QUERY – Searches the database and displays the first set of records that match criteria entered

CANCEL QUERY – Cancels the query and takes the form out of query mode. **Keyboard [Ctrl] [Q]**

PREVIOUS RECORD – Moves the cursor to the first enterable field in the previous record and triggers previous record logic coded into the form. **Keyboard [up arrow]**

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. **Keyboard [down arrow]**

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. **Keyboard [Ctrl Page Up]**

NEXT BLOCK – Moves the cursor to the next block that has at least one enterable field. If the next block is in another window, that window is opened. **Keyboard [Ctrl Page Down]**

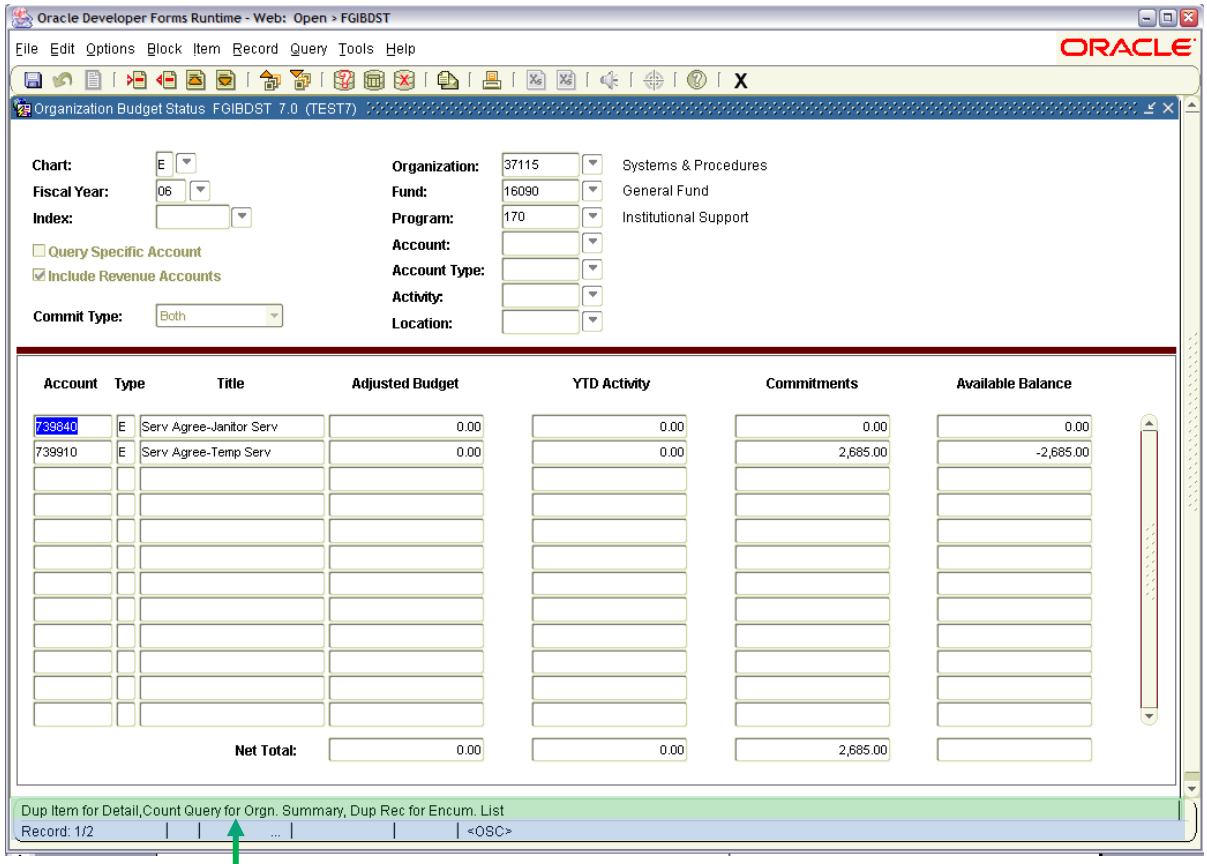
VIEW / SEND MESSAGE – Calls the General Message Form (GUAMESG) to view or send messages.

PRINT – Prints form

ON LINE HELP – Displays on line help if available for the form, displays the field name of the highlighted field

EXIT – Closes out the menu, form or window you are currently accessing. From the Main Menu screen, it exits the Banner system. In Query mode, it cancels the query and takes the form out of query mode. **Keyboard [Ctrl] [Q]**

Message Lines



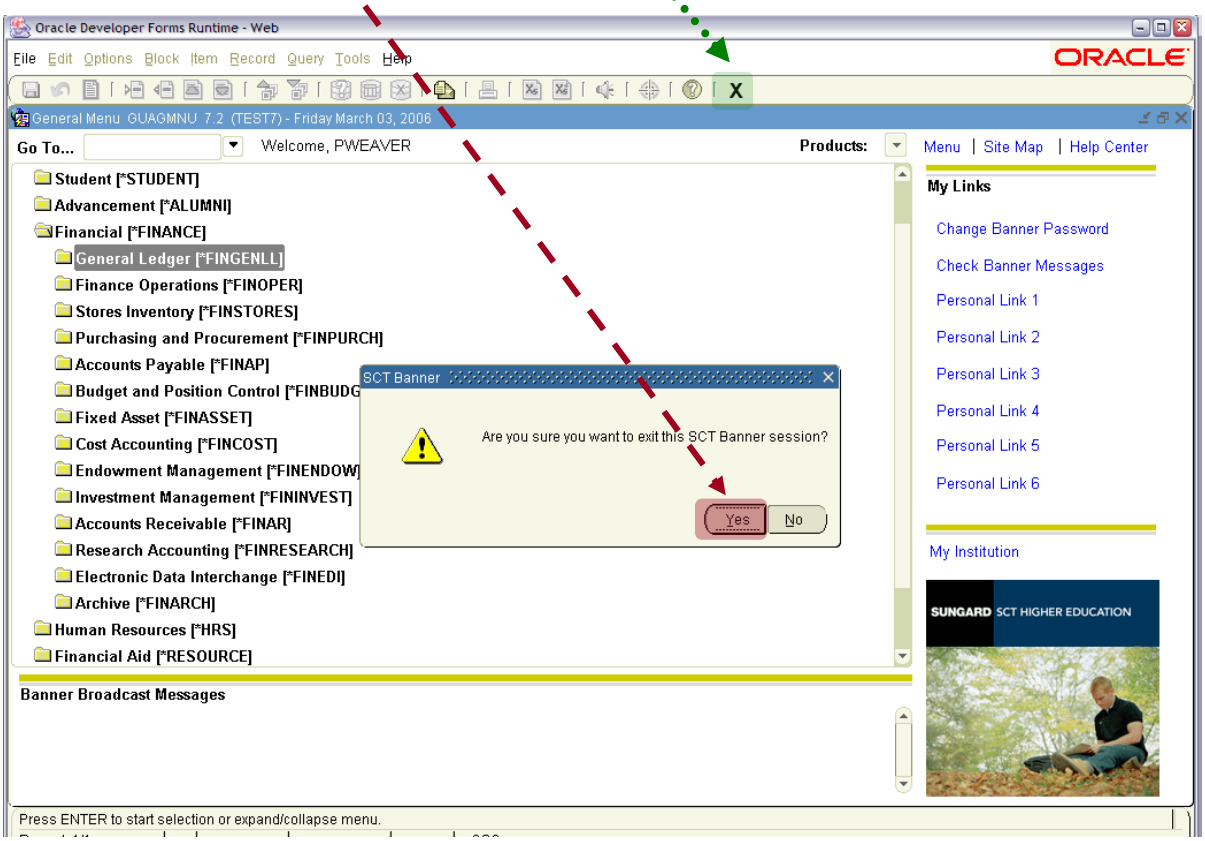
The First Message Line at the bottom of the forms can contain the following information for the field where the cursor is located.
Brief field description
Error and processing messages
Keyboard equivalents
If you can access other blocks, windows, or forms from the field

The Second Message Line at the bottom of the forms can contain the number of records updated if the form is an update form.

How to Log Out (exit)

From the Banner Main Menu **Click The Exit Icon** on the tool Bar.

To Exit Banner, **Click Yes** at the dialog box that asks, Are you sure you want to exit this SCT Banner Session?



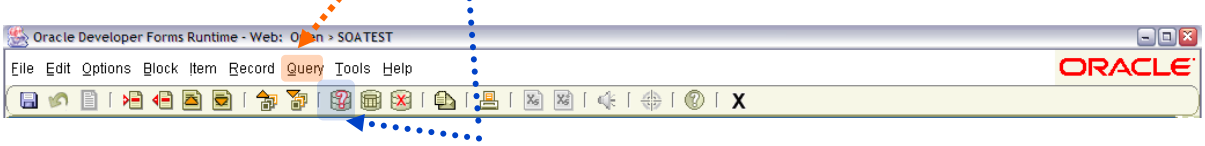
Entering Queries

The Banner Information System has powerful query features that enable users to search for and locate records based on the contents of one or more fields in a form. Several forms, such as the Entity/Name ID Search Form (FTIIDEN) used to locate vendors, are already in query mode when you open them. Other forms may not be in query form but can be put in to a query mode.

General instructions for using query forms:

There are three ways to enter a query:

1. From the Menu Bar **Use The Query Option**
2. From the Tool Bar **Click The Icon**
3. **Press F7** on the keyboard to put the form in query mode.



Once the form is in query mode, you can enter query (search) criteria. If you can move the cursor to a field, you can query information in that field. You can use the wildcard **%** (percent sign) when you enter criteria. The wildcard stands for any number of characters.

To get these results, Enter this criteria:

- All entries that contain *ma:* **%ma%**
- All entries that begin with *ma:* ***ma%***
- All entries that have *ma* as the final two characters: **%ma**

You can enter search criteria on multiple fields on a form.
Once you have entered all the search criteria on the form, perform the Execute Query function

The form will search the Banner database. When it has retrieved all the records that match the search criteria, it displays them on the particular form.

Querying in a List of Values Field

A field with a drop down box next to the field has a ***List of Values (LOV)***. To display the List of Values double click on the drop down box or press **F-9** on the keyboard. This will call a validation form listing possible codes and descriptions for the field. Select information from the validation form by double clicking on the value. An alternate method of selecting a value is by highlighting the value by single clicking the value and clicking on the select button .
Either method will return the selected information to the field in the calling form.

Note: Banner is case sensitive. Entering "AJAX CO" will not bring up the vendor if the name is correctly listed as "Ajax Co". (If you do not know if a name is capitalized use a wildcard as the first letter for example: **%jax% will bring up "Ajax" as well as "ajax".**)

Keep the search criteria as broad as possible, then narrow the search if too many records are returned.

When variations in spelling, punctuation, capitalization, spacing, etc. can affect the search results, replace the doubtful character(s) with the **%** wildcard.

When there is a possibility that the name may be slightly different from the version you have available, do a "global" search. Choose a key word of the vendor name not apt to be abbreviated and enter it this way: **%Ajax%**. This will bring up every vendor name, which includes the word Ajax.

Glossary

A	Alert box	A window that notifies you of a condition that may impact data. An alert box has only one response. You must acknowledge an alert box before you can do anything else on the form.
B	Block	A section of a form or window that contains a collection of related information, usually inside a beveled box or within a window. A form contains more than one block.
	Bookshelf	This option found in the Help menu allows you to access Banner documents directly from your computer. These electronic documents look the same as the hard copy versions, regardless of the computer you are using.
C	Checkbox	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. Checkboxes often represent yes/no conditions.
D	Dialog box	A window that appears when you must choose from two or more responses. You must acknowledge a dialog box before you can do anything else on a form.
	Direct Access	A field on the Banner main menu that allows you to access forms, menus, jobs, and QuickFlows directly by entering their seven-character name.
	Drag	Use the mouse to move the cursor over an object. While holding down the primary mouse button, move the object to its destination.
F	Field	An area on the form where you can enter, query, change, and display specific information. A field is sometimes referred to as an item.
	Form	Where you enter and look up information in Banner. A Banner form is similar to a paper form, except information is entered once and then used by other forms, reports, and jobs. A form may have one or more windows. The types of forms are Application, Validation, Rule, Control, Query, and Inquiry.
G	Gray	Banner uses the color gray to denote disabled items such as menu items and fields.
H	Horizontal Toolbar	A toolbar is a set of icons (pictures) that represents shortcuts for performing common functions. Banner offers both a horizontal and vertical toolbar.
I	Icon (Iconic button)	Visual images used to perform an action or respond to the system. Icons are small squares that contain a picture. They represent one or more actions that can be performed for the associated field or record. You can use iconic buttons to access a form or window related to the record or field where the cursor is located.
K	Keystroke	A keystroke is the act of pressing a key or a group of keys on your keyboard. Many actions in Banner can be accessed by using keystrokes. To determine which keystrokes are available, select Show Keys from the Help menu bar item.
L	LOV(s)	A List of Values (LOVs) shows the valid values, or codes, that can be entered in a field. These valid values are stored in Banner validation forms and tables.
M	Menu bar	The area at the top of the main window that contains pull-down menu options. These pull-down menus offer a variety of selections for navigating within Banner. If a pull-down menu item is gray, or dimmed, the item is disabled and cannot be accessed.

	Message Line	The area at the bottom of the main window where brief information appears about the field the cursor is in. The information may be about the purpose of the field, what you can do next, or how to move to another window or form. Error messages also appear here.
N	Navigation Frame	The Navigation Frame is on the left side of a form and shows all your navigational options. The options depend on the current location of your cursor. Some options take you to other windows or blocks within the same form, other options take you to other related forms.
O	Object Search	Use Object Search to access a form, job, menu, or QuickFlow if you know only part of the name, its description or type. When you use Object Search from a form, the current form remains open. When you exit the requested object, you return to the original form.
	Oracle	Relational database management system. Oracle is a third-party product that Banner uses.
P	Pull-down list	A list of values that is displayed when the arrow in a field is selected. Pull-down lists are used to select a field value from a list of pre-defined values.
	Pull-down menu	A list of menu items that is displayed when the menu item is selected. Pull-down menu items are used to select common Banner and Oracle functions.
Q	Query	To search for information. Banner allows you to query for specific information in the database based on selection criteria.
	QuickFlow	Use a QuickFlow to automatically access forms that are linked in a chain. Activating a Quickflow opens the first form in the chain. When you exit that form, the next form automatically opens.
R	Radio button	Small circles used to select one of several options in a group. Each radio button represents a choice. You can pick only one radio button at a time. When you select a radio button, the previously selected button is cleared. A smaller solid circle fills the newly selected button.
	Record	A group of fields that are interrelated. For example, an address is a record made of several fields: Street, City, State, and Zip/Postal code. A person may have several address records such as permanent, mailing, and business.
S	Scroll bar	A scroll bar indicates that more information can be displayed in a particular area. To use a scroll bar in Banner, click and drag the scroll box in the scroll bar, click either arrow (on either end of the scroll bar), or click anywhere in the scroll bar area.
	Shaded	Disabled. This can apply to fields, menu items, and icons. For additional information, see "Gray".
	Status line	The status line is directly under the auto hint and contains messages regarding record, list of value, and/or query information.
T	Title bar	The title bar shows the descriptive form name, the seven-character form name, the release number, and the database name from the Installation Control Form (GUAINST).
	Toolbar	A toolbar is a set of icons (pictures) that represents shortcuts for performing common functions. Banner offers both a horizontal and vertical toolbar.
V	Vertical Toolbar	A toolbar is a set of icons (pictures) that represents shortcuts for performing common functions. Banner offers both a horizontal and vertical toolbar. When you move your cursor over an icon on a toolbar, a yellow bubble appears with text that describes the function of the icon.
W	Wildcard	A character that is substituted for unknown character(s) in a Banner query. A percent sign (%) stands for any number of unknown characters;

	whereas an underscore (_) stands for only one unknown character.
Window	A framed, rectangular area within a form. A Banner form can have one or more windows.