Banner Navigation Basic Training

This training is intended for new Banner users. It provides a brief introduction to what Banner is and how to get around in Banner. For detailed navigation instruction, please refer to the Banner Getting Started Guide available on the Banner Training Moodle site or from your area’s functional lead.

Topics
1. Confidentiality and Security
2. What is Banner?
3. Getting into Banner
4. Changing Your Password
5. The Main Menu
6. Naming Conventions
7. Parts of a Form
8. Navigating Within a Form
9. Navigating To and Between Forms

1. Confidentiality and Security

Your Username/ID and Password have been established for your use based on your role at Connecticut College. Do not give your Username and Password to someone else and do not use anybody else’s.

The security associated with your Username is established at the request of your supervisor and the approval of the functional lead for the system(s) to be accessed. Banner access cannot be created without an email account and a signed Confidentiality Agreement.

Connecticut College takes the confidentiality of information very seriously. Your access to Banner may include access to information covered by privacy laws, such as FERPA and the Gramm-Leach-Bliley Act, or by the College’s Appropriate Use Policy. College policies for FERPA, Statement on Education Records of Students, Access and Confidentiality of Records, and Acceptable Use for Computer and Information Resources are available on CamelWeb.

2. What is Banner? What’s a database?

Banner is an integrated set of information systems that stores data for Admission, Student, Finance, Financial Aid, Human Resources, and Advancement information systems.

Banner data is shared, meaning that we are all working with the same data, so we must all be consistent in the way we enter data. Even if you’re department doesn’t use Banner, your department’s data needs to synthesize with other department’s data. This cooperation is the result of each department using the same rules and methodologies, or Data Standards.
3. Getting into Banner

Banner is accessed via the internet at [http://banner.conncoll.edu/](http://banner.conncoll.edu/).

Note: To access Banner outside of the administrative network, you will first need to log in to the VPN. For more information, please contact the Help Desk.

Enter your **Username** and **Password**. Ignore the **Database** field. Press Enter on your keyboard or click the **Connect** button. Banner will bring you to the main menu.

4. Changing Your Password

The first time you log on, you will be prompted to change your password. Additionally, every 90 days your password will expire and you will be prompted to change your password. You may change your password whenever you wish by accessing the **GUAPSWD** form.

The password you create must be at least 8 characters in length and include one letter, one number, and one of the following special characters: !"%*+,:;?-_.
5. The Main Menu

The **Main Menu** is the starting point for navigating through Banner. From the menu, you can select modules, forms, jobs, and more menus.

The **Go To** or **Direct Access Box** allows you to type in the 7-character name of an object for quick access. You may also navigate through the folders to search for the form you want.

6. Naming Conventions

The unique names of Banner objects (forms, reports, jobs and tables) are assigned according to a set of conventions.

<table>
<thead>
<tr>
<th>Object Name</th>
<th>Position 1</th>
<th>Position 2</th>
<th>Position 3</th>
<th>Position 4-7</th>
</tr>
</thead>
<tbody>
<tr>
<td>SPAIDEN</td>
<td>S</td>
<td>P</td>
<td>A</td>
<td>IDEN</td>
</tr>
<tr>
<td>FGIBDST</td>
<td>F</td>
<td>G</td>
<td>I</td>
<td>BDST</td>
</tr>
</tbody>
</table>

System/owners as indicated in position 1 of an object name

<table>
<thead>
<tr>
<th>First letter of object</th>
<th>System/ Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Advancement</td>
</tr>
<tr>
<td>F</td>
<td>Finance</td>
</tr>
<tr>
<td>G</td>
<td>General</td>
</tr>
<tr>
<td>P</td>
<td>Human Resources</td>
</tr>
<tr>
<td>R</td>
<td>Financial Aid</td>
</tr>
<tr>
<td>S</td>
<td>Student</td>
</tr>
</tbody>
</table>
7. Parts of a Form

A form is an online document where you can enter information and look up information.

The Toolbar provides quick access to commonly used functions which are discussed in the Menu Bar section. Hover over an icon and the name will appear. Grey icons are not available.

The Title Bar shows the descriptive name and 7-character name of the form or object, as well as the version and database.
Parts of a Form, continued

The **Menu Bar** contains pull-down menus for functions (many of which are also available from the toolbar). Greyed items are not available.

File  Edit  Options  Block  Item  Record  Query  Tools  Help

**File**

This pull-down menu contains standard Banner and Oracle functions. The bottom of the menu lists the last 10 forms you accessed in this session. Select any form in this list to re-access it.

**Direct Access** Displays the Direct Access Form (GUAPARM), which is used to access a form by its name.

**Object Search** Displays the Object Search Form (GUIOBJJS), which is used to search for a menu, form, job, or QuickFlow with part of the name, description, or type.

**QuickFlow** Displays the QuickFlow Form (GUAQFLW), which is used to access a QuickFlow. (If your department uses QuickFlow, it will provide you with training.)

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

**Rollback** Clears all information (except key information) and returns you to the first enterable field in the key block.

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

**Refresh** Clears the message line.

**Print** Prints the current window with the date and time in the title bar.

**Exit** Exits you from forms or windows.

**Exit Banner** Exits you from Banner.

**Exit QuickFlow** Exits you from a QuickFlow.

**Return to Menu** Returns to the main menu.

**Preferences** Displays the General User Preferences Maintenance Form (GUAUPRF), which is used to customize Banner for individual users.

**Edit**

This pull-down menu contains the functions used to edit text items.

**Cut** Cuts selected text and places it on the clipboard.

**Copy** Copies selected text to the clipboard.

**Paste** Pastes text from the clipboard to the spot where the cursor is located.

**Edit** Displays the Editor window, which is used to enter or update text.

**Options**

This pull-down menu contains navigation options which vary from form to form and depend on where the cursor is currently located. Some options take you to other blocks and windows within the current form. Other options take you outside the current form to related forms.

**Block**

This pull-down menu contains the functions used to navigate among the blocks of information on a form.

**Previous** 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** 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.

**Clear** Clears all information from the current block. (Information is not removed from any records or tables.)
Parts of a Form, continued

Item
This pull-down menu contains the functions used to navigate among the fields or items on a form.

Previous
Moves the cursor to the previous enterable field (item) in the current block.

Next
Moves the cursor to the next enterable field (item) in the current block. Occasionally, Next Item moves the cursor to the first enterable field (item) in the next block.

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

Duplicate
In a blank row of a repeating record, duplicates the contents of the same field (item) in the previous record and copies it into the new record.

Record
This pull-down menu contains the functions used to work with records on a form.

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

Next
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.

Scroll Up
Scrolls up the list of repeating records, putting the first displayed record near the bottom of the list.

Scroll Down
Scrolls down the list of repeating records, putting the last displayed record near the top of the list.

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

Remove
Removes all information for the current record. When you Save, the removed information is deleted.

Insert
Inserts a new blank record into the list of existing records.

Duplicate
Duplicates the contents of all fields in the record and copies them into a new record.

Lock
Temporarily locks the contents of the record so no other Banner user can update it. Save, Rollback, and Exit release the lock.

Query
This pull-down menu contains the functions used to query information in the database based on specified criteria.

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

Execute
Searches the database and displays the first set of records that match your search criteria.

Last Criteria
Enters the criteria from your last search.

Cancel
 Cancels the query and takes the form out of query mode.

Count Hits
Counts the number of records that match the search criteria and displays that number in the auto hint.

Fetch Next Set
If more records match the search criteria than fit in the window, replaces the current set of displayed records with the next set.

Note: Wildcard searches can be performed with a “%”.

Tools
This pull-down menu contains actions that can be performed with Banner Document Management Suite as well as options to submit or release a Workflow. We do not currently have the Document Management Suite. If your department uses Workflow, you will be provided training by your department.
Parts of a Form, continued

Help
This pull-down menu contains various help tools.

- **Online Help**
  Displays online information for the current form.

- **Dynamic Help Query**
  Displays the Dynamic Help Form (GUAHELP) in query mode, which is used to display traditional help for a field, block, or form.

- **Dynamic Help Edit**
  Displays the Dynamic Help Form (GUAHELP) in edit mode, which is used to edit traditional help for a field, block, or form. Use this feature to maintain custom information at your institution.

- **Help (Item Properties)**
  Displays the Oracle item properties window for the current field.

- **Show Keys**
  Displays the Keys list, which lists the functions and their equivalent keystrokes available in your environment for the current form, window, and field.

- **List**
  Displays the List of Values (LOV) for the current field if List of Values appears in the status line.

The **Key Block** is the first block on most forms. All information displayed on the form in other **blocks** refers to the values in the key block.

- Some blocks contain **scroll bars** for viewing additional information.
- Some forms contain **tabs** with additional blocks.
- **Fields, or items**, are the data elements within a block. Some fields contain a list of values which is indicated with an arrow.

```
Name Type: [ ]
```

The **Auto Hint Line** provides information about the form or field you are in. It is also used to display error or processing messages.

The **Status Line** provides information about the number of records and can indicate if a list of values (LOV, or list of acceptable values for a field) is available.

8. **Navigating Within a Form**

You can navigate within forms using the functions on the **Toolbar** or the **Menu Bar**. Many functions also have keyboard equivalents which are visible from Show Keys in the Help menu.

- **Next Block** moves you to the next block of a form. **Previous Block** moves you to the previous block UNLESS you’re trying to get back to the **Key Block**. To return to the **Key Block**, use **Rollback**.

Simply click on a tab within the form to move between tabs. You may also find the tabs accessible via **Options** in the **Menu Bar**.

- **Next Record** and **Previous Record** move you between records within a block. You can also use your arrow keys on your keyboard.
**Next Item** and **Previous Item** move you between items within a record.

Access the List of Values (LOV) associated with a field by clicking the down arrow next to the field. The **LOV** is a list of acceptable values for the field.

**Scroll bars** indicate that more information exists within a field or block than can be viewed at one time. Click and drag the scroll bar or click on the arrows on either side of the scroll bar to view the additional information.

To exit a form, use **Exit**. To exit Banner, use the same **Exit** function from the **Main Menu**.

### 9. Navigating to and Between Forms

You can access forms using several methods.

From the **Main Menu**, you can either:

- enter the 7-character name into the **Go To** or **Direct Access Box** or
- navigate through the folders, double-clicking to open and close folders, and to select a form.

While in a form, you can access another form using the Menu Bar.

- Select **File** then **Direct Access** then enter the name of the form or other object, then press **Enter**.
- Select **Options** for forms and objects related to the current form.
- Select **File** and beneath the menu options you will see a list of the last 10 forms you’ve accessed during your session.

You can have multiple forms open simultaneously but too many open forms may slow down your computer, and may be confusing if working with multiple IDs.

To exit a form, use **Exit**. To exit Banner, use the same **Exit** function from the **Main Menu**.