

BLISS-200

Banner

Overview and Navigation

Presented by

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Agenda

- **Introductions**
- **Banner Overview**
- **Logging into Banner Workshop**
- **Navigation Presentation**
- **Navigation Workshops**
- **Questions**



Who are you?

- **Name**
- **Office/Title**
- **How do you expect to use Banner?**
- **Something you do for FUN!!**



BLISS Training
Banner Overview and Navigation

OVERVIEW of
BANNER



Banner Overview

Where did Banner come from?

- Banner is an Oracle database system.
- It is designed for Higher Education.
- Banner has been purchased by USD from a Vendor.



Banner Overview

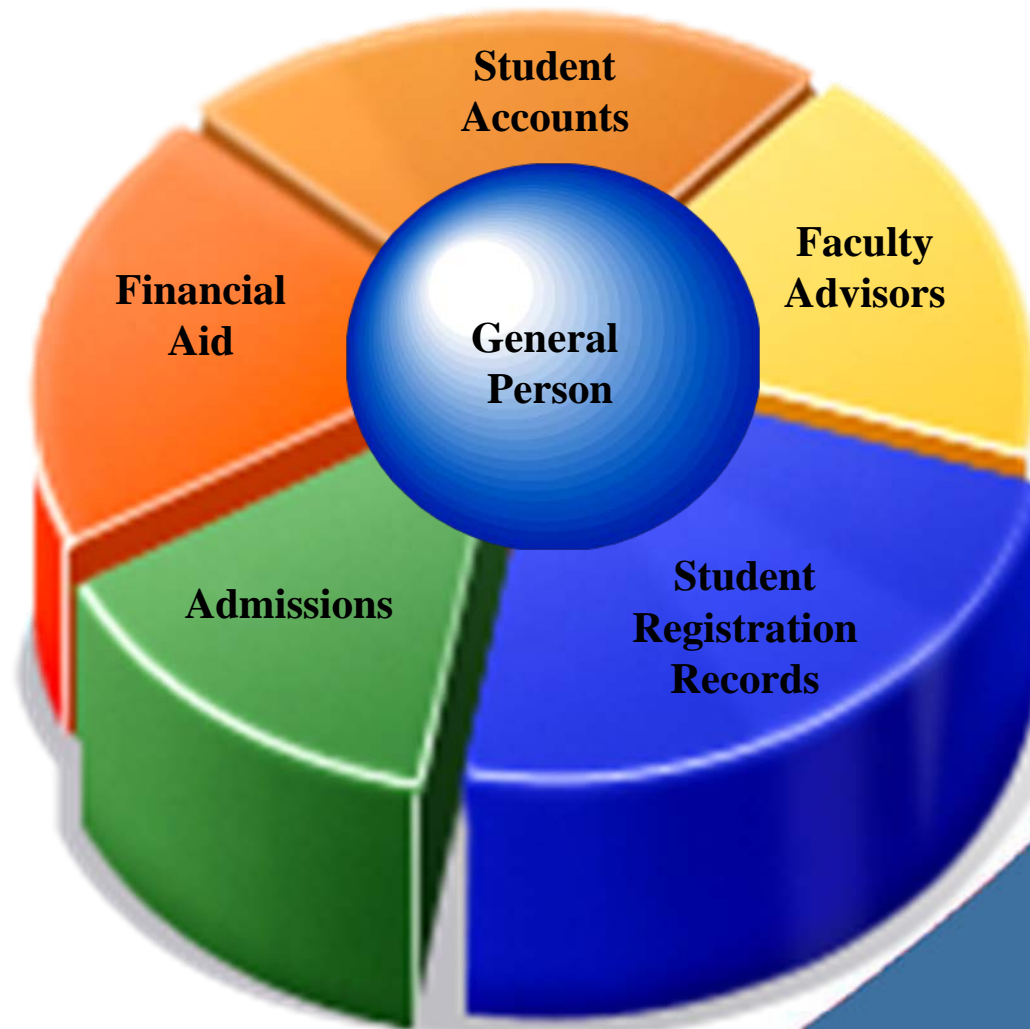
What is in Banner?

- **Three Banner components are being installed at USD:**
 - General
 - Student
 - Financial Aid
- **There are other ‘add-ons’ to Banner**
 - Luminus: Portal (MySandiego)
 - Xtender: Imaging
 - ODS/Cognos: Reporting Tools



Banner Overview

What is in Banner?



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WORKSHOP #1
Logging into Banner



BLISS Training

Banner Overview and Navigation

Banner Navigation

(INB)



Banner Navigation

Topics for this session

- Types of Forms
- Parts of a Form
- Navigating in a Form
- Banner Naming Conventions
- Where to go to get... HELP!



Banner Navigation

Types of Forms

- There are eight types of forms used in Banner, the first four are:
 - **Menu:** used to navigate through Banner.
 - **Application:** used to enter, update and query information. The most common type of form.
 - **Validation:** used to define values for specific fields displayed on Application forms.
 - **Rules:** used to define calculations and parameters that impact other forms, reports and jobs.



Banner Navigation

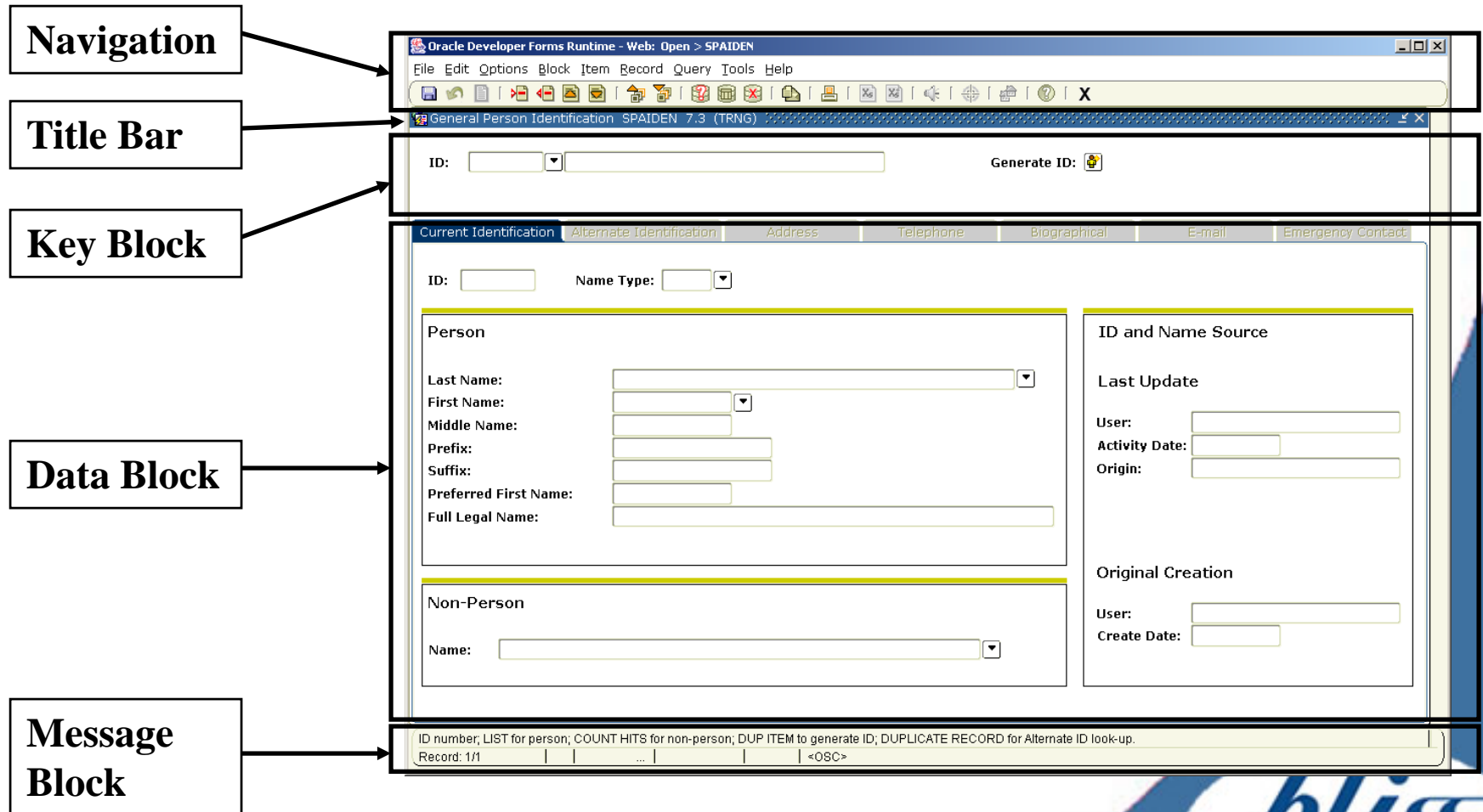
Types of Forms

- There are eight types of forms used in Banner, the last four are:
 - **Control**: used to define rules at the system level.
 - **Query**: used to look up existing information, often returning values to a calling form. Query forms are always called, you can not directly access a query form.
 - **Inquiry**: just like a query form except you can directly access an Inquiry form.
 - **Wizard**: used to give step-by-step instructions for completing an application.



Banner Navigation

Parts of a Form



Banner Navigation

Parts of a Form – Navigation Block

- There are two parts:
 - The Menu Bar:



File Edit Options Block Item Record Query Tools Help

- The pull-down menus are active except when you are in a dialog box, alert box or List-of-Values window.

- The Tool Bar



- The tool bar contains buttons that perform common functions.

Banner Navigation

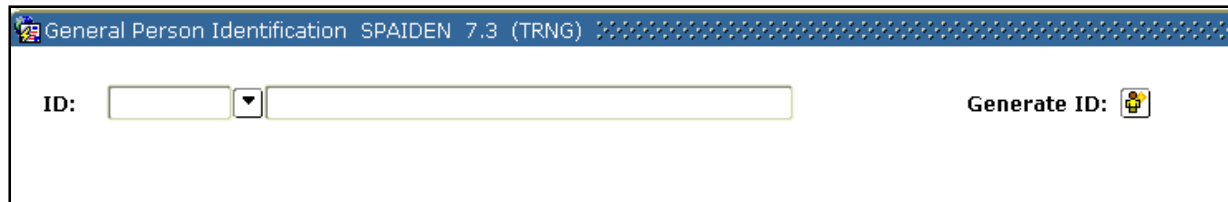
Parts of a Form – Title Bar



- The Title bar can show the following information:
 - Descriptive form name
 - The 7 character form name
 - The Banner release number
 - The name of the Database instance
(from the GUAINST form)


Banner Navigation

Parts of a Form – Key Block



General Person Identification SPAIDEN 7.3 (TRNG)

ID:

Generate ID: 

- Most forms have a Key Block (validation and some list forms don't).
- The Key block determines what is entered or displayed in the data blocks of the form.
- Key blocks may contain one or more fields depending on type of data.
 - Person forms may only have an ID field
 - Student forms may have an ID and Term fields

Banner Navigation

Parts of a Form – Data Block

- A form may have one or more data blocks
- When multiple blocks exist they may be:
 - Separated by a ‘bar’ on the same window,
 - Separated by ‘tabs’ on the window,
 - May display on different windows.

Banner 101

Parts of a Form – Data Block

- Separated by ‘tabs’ on the window

The screenshot shows the Oracle Developer Forms Runtime interface for SPAIDEN. The window title is "Oracle Developer Forms Runtime - Web: Open > SPAIDEN". The menu bar includes File, Edit, Options, Block, Item, Record, Query, Tools, and Help. The toolbar contains various icons for navigation and actions. The main content area displays a form titled "General Person Identification SPAIDEN 7.3 (TRNG)". The form has a tabbed interface with the following tabs: "Current Identification" (selected), "Alternate Identification", "Address", "Telephone", "Biographical", "E-mail", and "Emergency Contact". The "Current Identification" tab is highlighted with a black box and labeled "Block Tabs" with an arrow. The form contains several data blocks:

- ID:** A text input field with a dropdown arrow and a "Generate ID:" button with a key icon.
- Name Type:** A dropdown menu.
- Person:** A data block containing fields for Last Name, First Name, Middle Name, Prefix, Suffix, Preferred First Name, and Full Legal Name.
- Non-Person:** A data block containing a Name field.
- ID and Name Source:** A data block containing fields for Last Update, User, Activity Date, and Origin.
- Original Creation:** A data block containing fields for User and Create Date.

At the bottom of the form, there is a status bar with the text: "ID number; LIST for person; COUNT HITS for non-person; DUP ITEM to generate ID; DUPLICATE RECORD for Alternate ID look-up. Record: 1/1 | ... | <OSC>".

Block Tabs

Banner Navigation

Parts of a Form – Message Block

- The message block is always at the bottom of the form. It may display:
 - Informational messages:

ID number; LIST for person; COUNT HITS for non-person; DUP ITEM to generate ID; DUPLICATE RECORD for Alternate ID look-up.				
Record: 1/1			...	<OSC>

- Functions specific to a block:

From term not equal to key term, press DUP REC or COPY to update course data.				
Record: 1/1			...	<OSC>

- Error messages:

ERROR Invalid code, press LIST for valid codes.				
Record: 1/1			... List of Valu...	<OSC>

Banner Navigation

Getting around on the Form

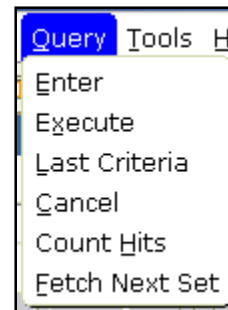
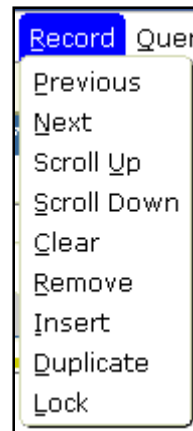
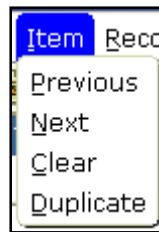
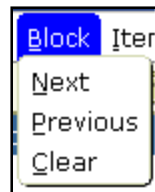
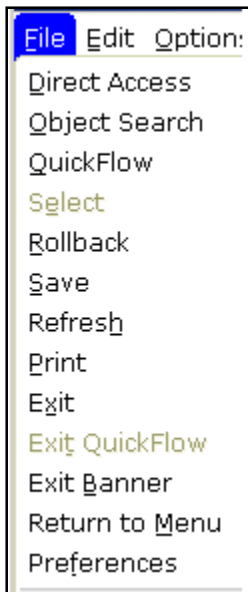
- Navigation in a form can be done using:
 - A menu bar options
 - A tool bar options
 - Keyboard Equivalents
 - Using the Mouse to click in a Field or on an Icon

Banner Navigation

Using Drop-Down Menus

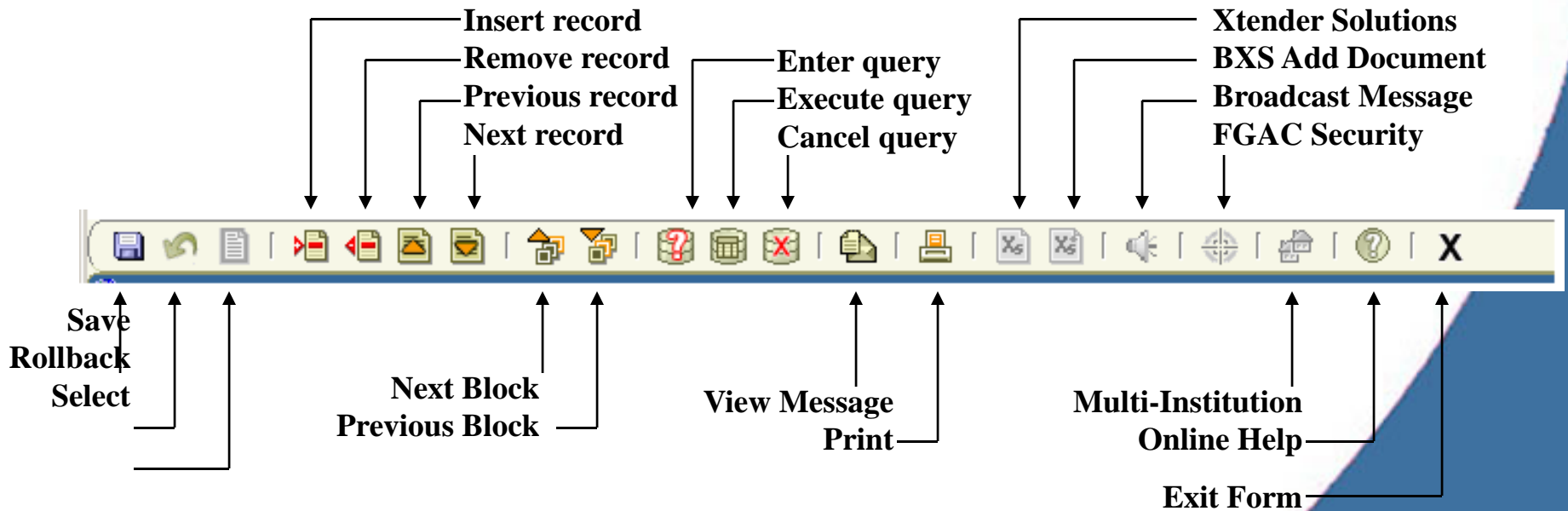
- Using the Menu Bar for navigation

File Edit Options Block Item Record Query Tools Help

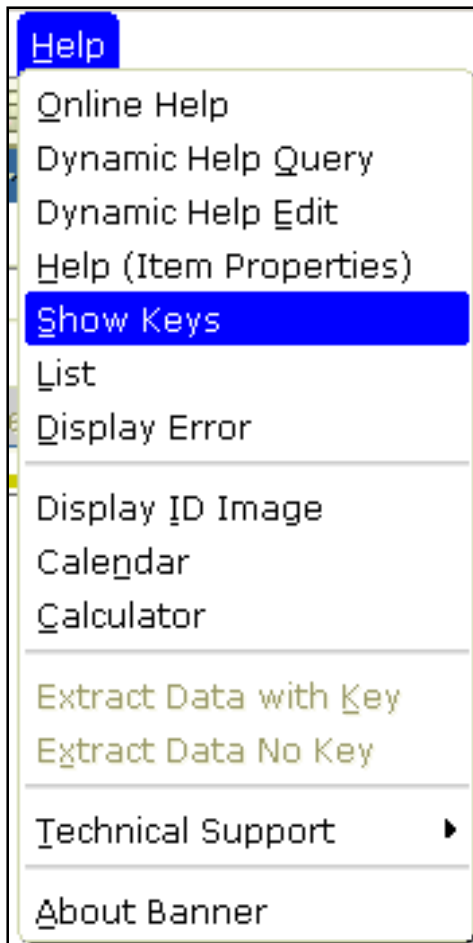


Banner Navigation Using Icons

- Using the Tool Bar Icons



Banner Navigation Using Key-Strokes



A screenshot of the 'Keys' dialog box, which is a table listing various functions and their corresponding key strokes. The table has two columns: 'Function' and 'Key'.

Function	Key
Clear Block	Shift+F5
Clear Field	Ctrl+U
Clear Form	Shift+F7
Clear Record	Shift+F4
Display Error	Shift+F1
Display Navigation window	F5
Display VPD Code	Shift+Ctrl+F10
Edit	Ctrl+E
Exit	Ctrl+Q
Function 1	Shift+Ctrl+F1
Function 2	Shift+Ctrl+F2
Function 3	Shift+Ctrl+F3
Function 4	Shift+Ctrl+F4
Function 5	Shift+Ctrl+F5
Function 6	Shift+Ctrl+F6
Function 7	Shift+Ctrl+F7
Function 8	Shift+Ctrl+F8
Function 9	Shift+Ctrl+F9
LIST	F9
Next Block/Query	Ctrl+PageDown
Next Primary Key	Shift+F3
Previous Block/Query	Ctrl+PageUp
Previous Field	Shift+Tab
Print	Shift+F8
Return	Return
Scroll Down	PageDown
Scroll Up	PageUp
Show Keys	Ctrl+F1
Update Record	Ctrl+U

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WORKSHOP #2 and 3
Logging into Banner



Getting Help

- Banner Documentation
 - On the <http://oraindex.sandiego.edu/> site, ‘Click here for the Documentation Servers’
 - Select either:
 - SGHE Banner Student
 - Contains the PDF/Bookshelf User Guides for all the Products.
 - Check the ‘SCT Banner General’ tab, then open the ‘SCT Banner Getting Started Guide / 7.2’
 - SGHE Banner Financial Aid
 - Contains the Release notes for the Financial Aid Upgrades



Banner 101 Getting Help

The screenshot shows a Microsoft Internet Explorer browser window. The address bar displays the URL: <http://oraindex.sandiego.edu/oradoc/bdoc6x/bkshlf7x.pdf>. The browser title is "Microsoft Internet Explorer provided by University of San Diego". The page content features a dark blue header with the "SUNGARD" logo and "SCT • HIGHER EDUCATION" below it. To the left of the header is a photograph of a wooden chair. The main body of the page is green and contains the text "SCT BANNER® BOOKSHELF" in white. Below this, the text "Main Menu" is displayed. On the left side of the browser window, a "Bookmarks" sidebar is open, listing various links related to SCT Banner documentation and services.

Bookmarks:

- SCT Banner Documentation Bookshelf Getting Started Guide / December 2005
- SCT Banner Release Interdependency Matrix / December 2005
- What is New? / December 2005
- Banner Luminis Data Integration (LDI)
- CAST
- Campus Pipeline
- Luminis Channels for Banner
- Luminis LDI Common
- Luminis LDI for e-Procurement
- SCT Banner Accounts Receivable
- SCT Banner Advancement
- SCT Banner Advancement Self-Service
- SCT Banner Employee Self-Service
- SCT Banner Faculty Self-Service
- SCT Banner Finance
- SCT Banner Finance Self-Service
- SCT Banner Financial Aid

Banner 101

Getting Help

- Banner Brown Baggers sessions
 - Wednesdays in Maher 112 from Noon to 1pm
- Scheduled Banner Training Sessions
 - Check the BLISS site for more information
- Your Banner Team Leaders



Banner 101

Getting Help

- Banner won't let me...I get an error when...
- So when contacting your Friendly IT person:
 - What instance are you in (trng, dev1, etc.)?
 - What form or process were you running?
 - What were you doing and what results were you expecting?
 - Are there any messages?
 - Auto-Hints, Dialog or Alert boxes?
 - Can you do a screen print (Alt + Print Screen)?

