

BLISS210

Workshop 3 – Updating/Adding Records




Overview:

This set of Activities will provide you with practice in Adding and updating records in Banner.

Special Instructions:

NOTE: The forms and records to which you have update access will be determined by your roles in Banner. For Training purposes, you have access to data which might not be the case when you are using your own login ID in the Production system. If you feel that you need update access to data which your role does not permit, discuss this with your supervisor.

Activity 1 – Updating an existing Record

Step	Action	Results
1.	Navigate to the SPAPERS – General Person form.	Banner displays the SPAPERS form.
2.	Enter your employee ID (remember to use 00 in front the number on your ID card). Or Enter your name (last, first) in the Name field.	Your record should be in context in the key block of the form.
3.	Perform a Next block function and navigate to the Marital Status field.	The cursor should be in the Marital Status field
4.	Change the value of the field. Remember this is only the test system it has not effect on your actual personnel records.	Banner places the new value in the field
5.	Perform the Save Record function using the Save icon  , the F10 key or the File/Save option from the Dropdown menu.	Banner issues a message in the Auto Hints block: “FRM-40400: Transaction complete: 1 record applied and saved.

Activity 2 – Adding a new record (one record displayed per page).


Step	Action	Results
1.	Navigate to the SPACMNT – Person Comment form.	Banner displays the SPACMNT form your ID is still in context.
2.	Perform a Next Block function.	Banner moves the cursor to the comment type field. The Auto Hint is: “FRM-040350: Query caused no records to be retrieved.”
3.	Select a value for the Comment Type field (e.g. GEN would be a general comment), navigate to the ‘Comments:’ field and enter some text (e.g. ‘This is a general comment’). Execute the Save function.	Banner saves the record, and the Auto Hints Block contains the message: “ FRM-40400: Transaction complete: 1 record applied and saved.”

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Activity 3 - Adding a record to a multi-record form.

Step	Action	Results
1.	Navigate to the Banner form SPATELE for your ID.	Banner displays the SPATELE form with your ID in the key block.
2.	Perform a Next Block function.	Banner places the cursor in the 'Telephone Type:' field.
3.	Enter a 'Local' Telephone type and save the record. Note: tab through the fields to discover which are required.	Banner saves the record, and the Auto Hints Block contains the message: " FRM-40400: Transaction complete: 1 record applied and saved." Note that the cursor is still in the Data block on the record you just saved.
4.	Perform a 'Roll Back' function.	Banner moves the cursor back to the ID field in the Key Block.
5.	Perform a 'Next Block Function'.	Banner moves the cursor to the first record in the Data block.
6.	Add a second telephone record. You can either use the down-arrow to move to an blank record, or you can use the 'Insert Record function. (the insert record icon  or the Record/Insert dropdown menu option, or the F6 function key.	Banner moves the next available empty record and places the cursor in the 'Telephone Type' field for that record.
7.	Enter a new telephone record using the CELL type, Save the record.	Banner saves the record, and the Auto Hints Block contains the message: " FRM-40400: Transaction complete: 1 record applied and saved."

Activity 4 – Deleting records.

Step	Action	Results
1.	Perform a 'Roll Back' function.	Banner moves the cursor back to the ID field in the key block.
2.	Perform a Next Block function.	Banner places the cursor in the 'Telephone Type:' field on the first record in the Data Block.
3.	With the cursor on the first record, perform a Remove Record (delete) Function. You can either use the Remove Record icon  or use the Record/Remove option from the Dropdown menu, or use the Shift+F6 keys.	Banner removes the record from the form. NOTE the record has not actually been removed from the data base at this point. The delete is not 'real' until a 'Save' function has been performed.

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Step	Action	Results
4.	Perform a 'Roll Back' function.	Banner displays a dialog box with the message: "Do you want to save the changes you have made?" with the options: Yes – Delete the record from the Data Base. No – Do not delete the record from the Data Base. Cancel – Return to the data block, I will make additional changes before saving.
5	Click on the 'No' option in the Dialog box.	Banner moves the cursor back to the ID field in the Key block.
6	Perform a Next block Function.	Banner moves the cursor back to the first record in the Data Block. NOTE the record you removed is still there.
7.	With the cursor on the first record, perform a Remove Record (delete) Function.	Banner removes the record from the form.
8.	Now perform a SAVE function.	Banner issues the message in the Auto Hints line: " FRM-40400: Transaction complete: 1 record applied and saved." The record has now been deleted from the Data Base.

Summary:

In this set of activities you have Updated, Added and Deleted records from banner forms.

Remember that with any Insert or Delete/Record Remove function, the action is not complete until you do a 'Save ' function.

In the Production system you will not have access to add and delete records from every form. If you get a message that you do not have privileges to perform a Change, Add, or Delete, you need to contact your supervisor.

Some Banner forms require that you add or delete records in blocks in a specific order. If you do not get the expected results always check the Auto Hints message to see if there is some dependency which must be met before you can perform your desired action.