



# Banner Training

## Navigation

Manual Version 4.0  
Banner Version 8.3.0.5



**NORTHEASTERN**  
STATE UNIVERSITY

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# Chapter 1: Banner Introduction

## What is Banner?

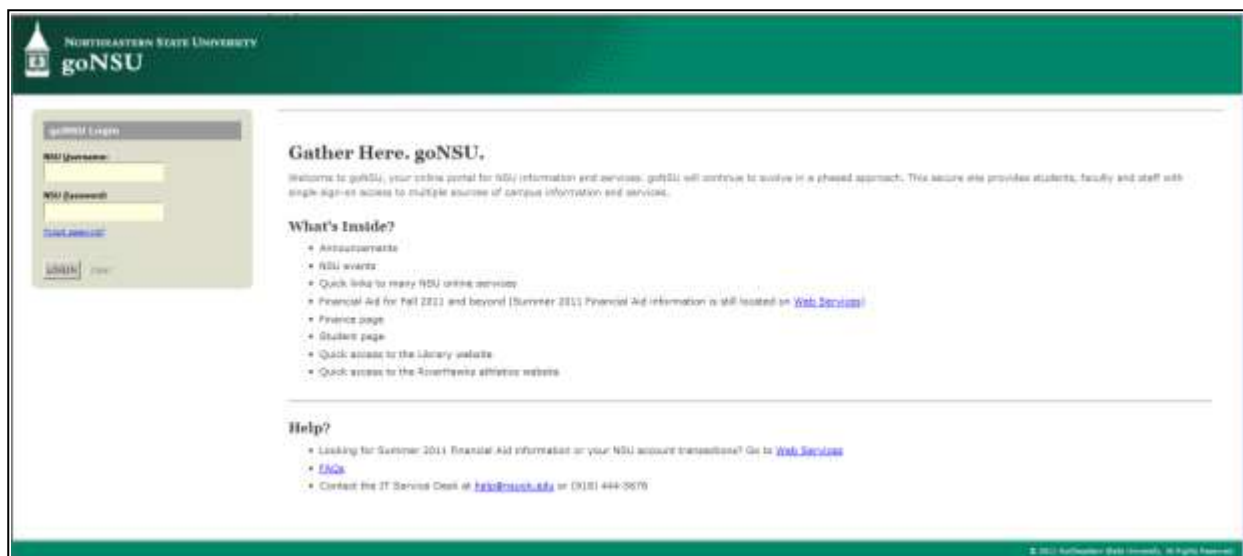
Banner is a Web-based, administrative software application developed specifically for higher education institutions by a company named Sungard Higher Education.

Banner provides an online environment that allows users to perform administrative functions in a highly efficient manner. Data is entered into a database, and integrated and shared among different departments across the University.

## How to log in

Banner is accessed via the Northeastern State University portal at <http://go.nsuok.edu>.

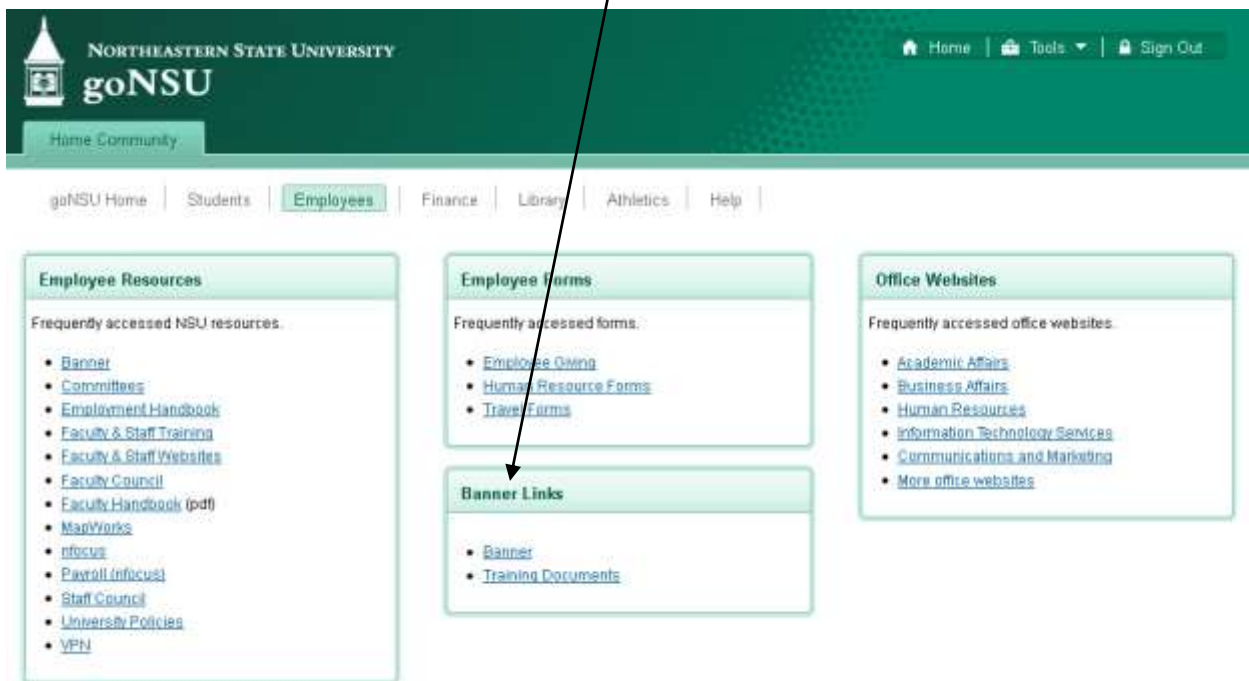
1. Using Internet Explorer, go to the Portal website.
2. Enter your same Username and Password that you use for GreenMail, click Login.



3. On the Home Community tab, click the desired channel



4. Once on the chosen channel, refer to the “Banner Links” box for access to Banner and Self-Service Banner.

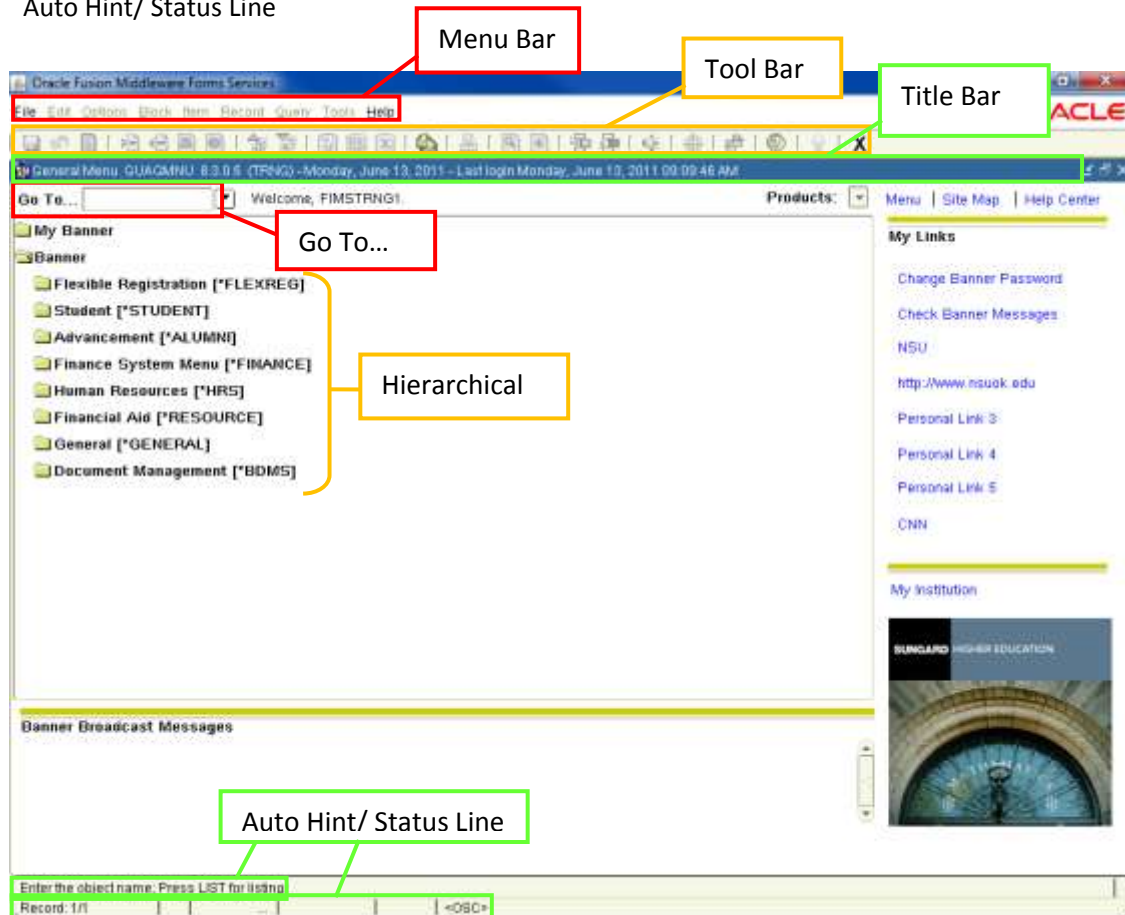


## Chapter 2: General menu and Navigation

The Banner Main Menu will be displayed after successfully logging on to Banner. The Main Menu provides an overview of the menus, forms, and jobs in Banner.

### Components of the Main Menu include:

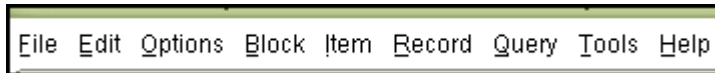
- Menu Bar
- Tool Bar
- Title Bar
- Go To... field – Direct Access
- Hierarchical menu
- Auto Hint/ Status Line



## Menu Bar

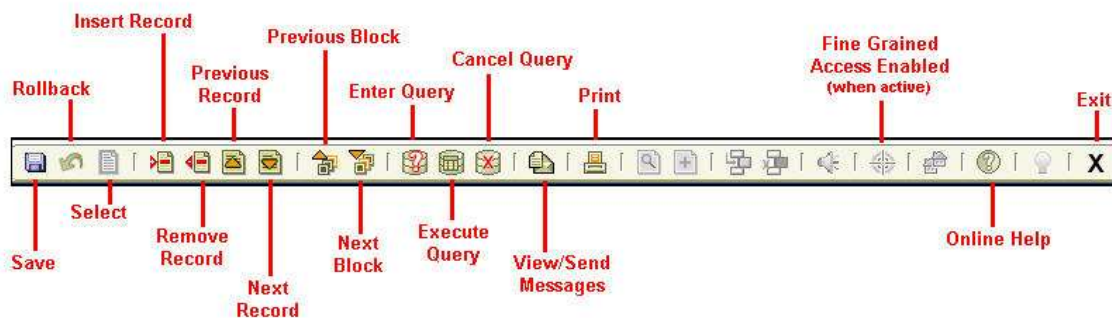
The Banner Menu Bar, located at the top of every form, contains pull-down menus. It offers a variety of options for navigating within Banner. The Menu Bar is accessible anytime except when a dialog box, alert box, or list of values (LOV) is displayed on the screen.

There are nine pull-down menus on the Menu Bar, each with a variety of selections.



## Tool Bar

The Banner Tool Bar contains buttons that perform common functions. It is located directly under the Menu Bar.



To access a Tool Bar button:

Select the appropriate button. You can click a button any time, except when you are in a dialog box, alert box, or List of Values (LOV). (You must respond to these windows before you can select a button.) If a button is dimmed, then it is disabled and cannot be clicked.

## Title Bar

The Title Bar of all Banner forms shows the description, form name, version number, and database:



## Bubble Help

When you move your cursor over a button and pause, a tool tip appears with text that describes the function of the button.



## Direct Access

**Direct Access** is entering the name of the form (e.g., SPAIDEN, SAAADMS, TSAAREV) in the **Go To...** field of the Main Menu. When the Main Menu is open, your cursor focus will automatically be in the **Go To...** field. Simply type the name of the form and press ENTER on your keyboard.



You can also access forms using Direct Access if you are not in the Main Menu. Choose File > Direct Access, then enter the name of the form, and press ENTER. You will be taken to the form you chose (if you have access to that form).

## Hierarchical Menu Tree Structure

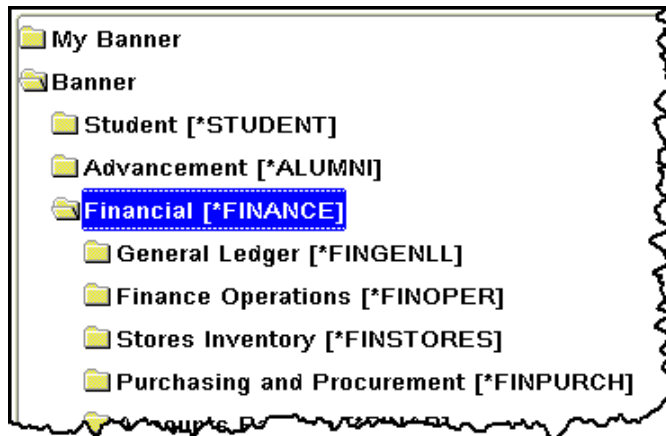
When accessing Forms from the Main Menu they are displayed as a hierarchy. You can expand and collapse content by clicking on the folders.

### Closed folder

Select the closed folder to the left of an item to expand and view items contained under it.

### Open folder

Select the open folder sign to collapse the menu into the original item.



## Last 10 Forms in the File Pull-Down Menu

You can quickly re-access a form that was previously opened in the current session. The bottom of the File pull-down menu lists the last forms (up to ten) you used in the current session. You can re-access any form in the list.

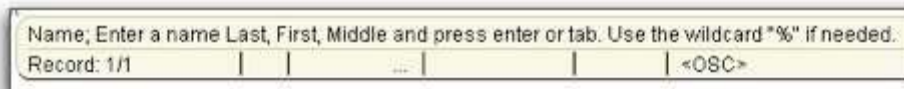
### Note:

The only forms that never appear in this list are the QuickFlow Form (GUAQLW), Direct Access Form (GUAPARM), and Object Search Form (GUIOBS).

### To access a form from the File pull-down menu:

1. Access the File pull-down menu.
2. Select the form name from the list at the bottom of the pull-down menu.

## Auto Hint and Status Line



### Auto Hint

The Auto Hint at the bottom of the form may contain the following information for the field where the cursor is located:

- Brief field description
- Error and processing messages
- Keyboard shortcuts
- Instructions for accessing other blocks, windows, or forms from the field

**Tip:** If you have typed something that is not allowed in the field, read the message on the Auto Hint line. To clear the message, select the **Help** button once; this will re-display the original information about that field.

### Status Line

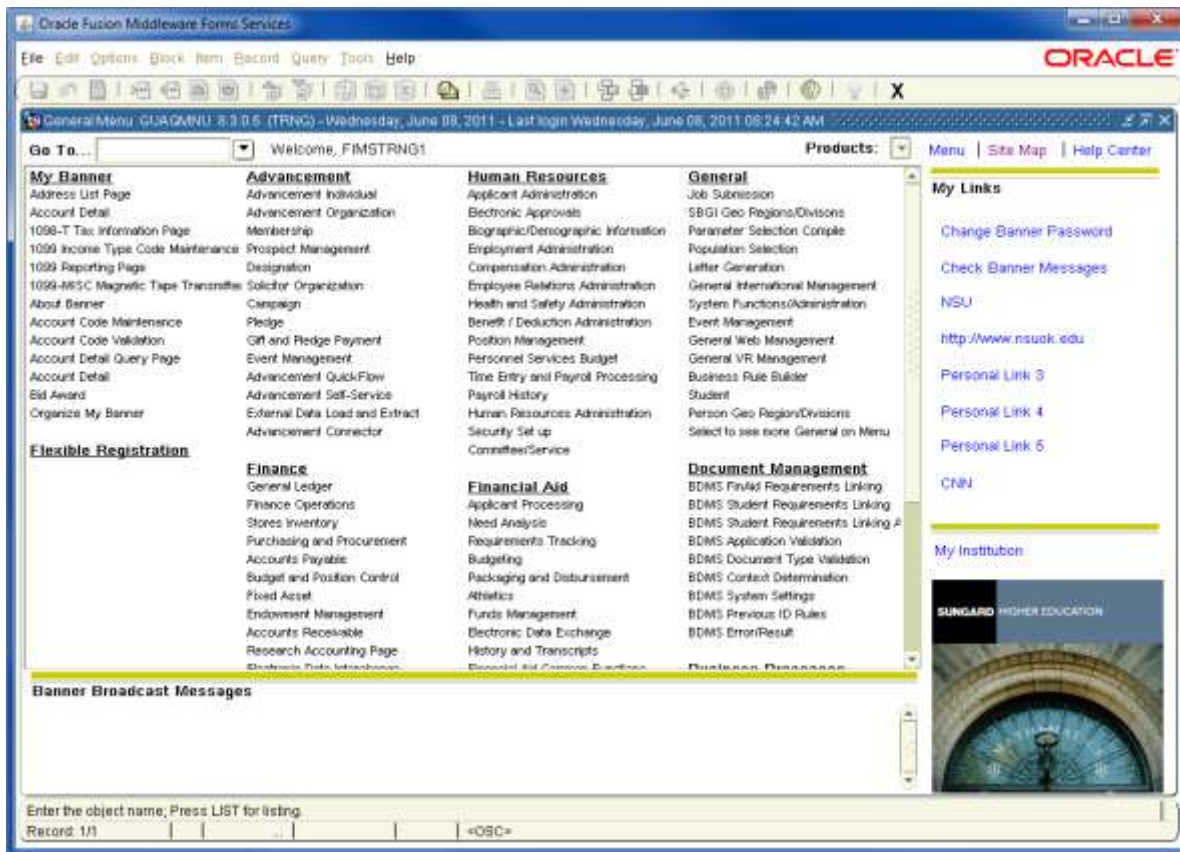
The Status Line directly under the Auto Hint can contain one or more of the following messages:

- **Record n/n:** Shows the number of the current record followed by the total number of records in the current block. If there are more records than fit in the window, the total appears as a question mark (for example, 3/?) until you scroll to the last record in the block. Once the last record is displayed, the total appears as a number (for example, 3/15).
- **List of Values:** Indicates the field has a List of Values.
- **Enter-Query:** Indicates the form is in query mode.



# Site Map

The Site Map provides an all-encompassing look at the Banner menus.



## Chapter 3: Banner Forms

**Banner is composed of forms.** Forms are what might also 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 or class schedule form.

**PLEASE NOTE: YOU WILL ONLY SEE THE NAMES OF FORMS TO WHICH YOU HAVE ACCESS.**

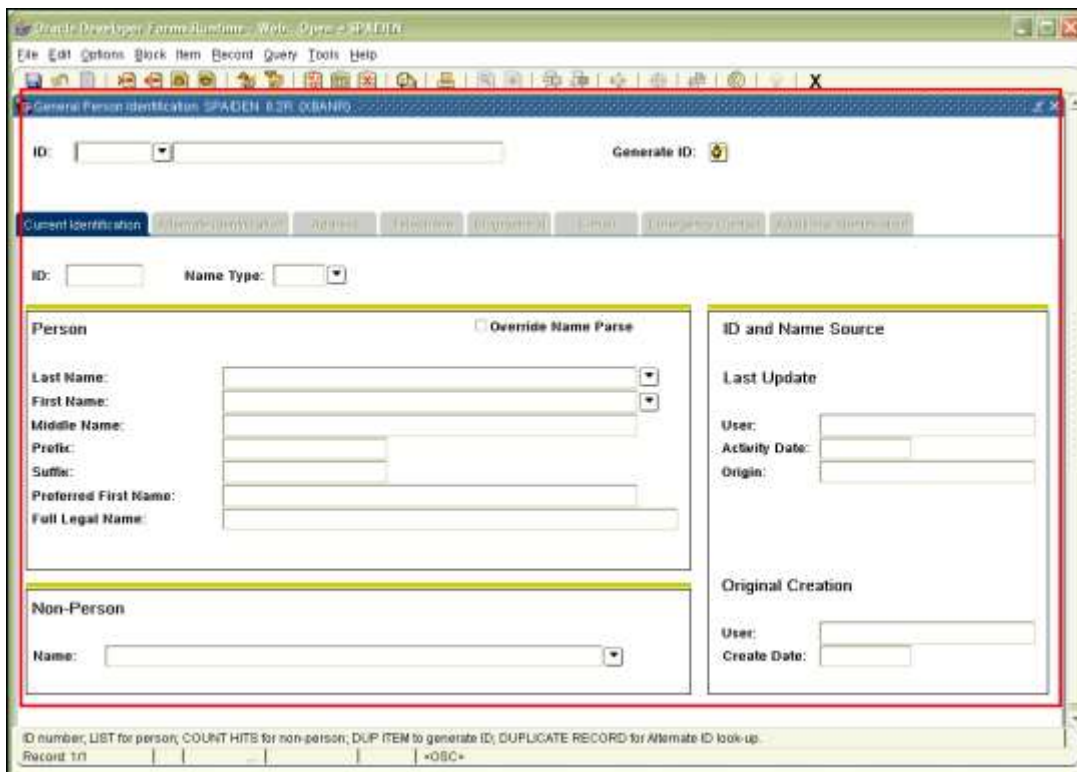
**Every form has a unique 7-character name** (e.g., SPAIDEN) **and a description of the form** (e.g., General Person Identification Form). For information about how Banner forms are named, see the appendix Banner Naming Conventions.

**Information in Banner forms, like paper forms, is arranged in blocks.** Understanding Banner navigation and the many functions a form has, will better help you in retrieving data.

A form is an online document where you can enter and look up information in the database. A form visually organizes information so it is easier to enter and read. A Banner form is similar to a paper form, except information is entered once and then used by other forms, reports, and jobs.

Forms can include windows, dialog boxes, and alert boxes.

For example, in the picture below, the red box outlines the SPAIDEN form.



The screenshot shows a web browser window titled "Oracle Developer Forms Runtime - Web: Open - SPAIDEN". The browser's address bar displays "General Person Identification: SPAIDEN 6.20 OXBANK". The form itself is titled "General Person Identification: SPAIDEN 6.20 OXBANK" and features a "Generate ID:" button. Below the title bar, there are several tabs: "Current Identification", "Address Information", "Address", "Telephone", "Dissemination", "Other", "College Contact", and "Additional Information". The main form area is divided into sections: "Person" (with an "Override Name Parse" checkbox), "Non-Person", "ID and Name Source", "Last Update", and "Original Creation". Each section contains various input fields and dropdown menus. 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." and "Record 1 of 1" with a "+OSC+" button.

## Parts of a Form

A form is composed of multiple parts. Not all parts can be seen on all forms. These parts will be described below.

The screenshot shows a software window titled "General Person Identification - SPAIDEN 8.2R (KBANP)". The form contains several sections:
 

- Title Bar:** Located at the top, containing an "ID:" dropdown menu and a "Generate ID:" button.
- Key Block:** A horizontal bar below the title bar with tabs for "Current Identification", "Alternate Identification", "Address", "Telephone", "Biographic", "E-mail", "Emergency Contact", and "Additional Identification".
- Information Block:** A vertical panel on the right side containing fields for "Last Update", "User", "Activity Date", "Origin", "Original Creation", "User", and "Create Date".
- Search icon:** A dropdown menu labeled "Name Type:" with a magnifying glass icon.
- Field:** A large section for entering personal information, including "Last Name", "First Name", "Middle Name", "Prefix", "Suffix", "Preferred First Name", and "Full Legal Name".
- Non-Person:** A section at the bottom for "Name:" with a dropdown menu.

Item	Description
Title Bar	May display the form's descriptive name, the seven character ID name, the software version number and the database name.
Key Block	Contains information that determines what is entered or displayed on the remainder of the form.
Information Block	Displays data about the information entered in the Key Block. Area where you enter information prior to updating a record.
Search Icon	Calls up the set-up form that contains the pre-entered data for you to select an ID.
Field	Area on a form where you can enter, query, change, and display specific information.

Item	Description
Tabs	Tabs are used to arrange information in a meaningful way, and allow you to navigate easily between groups or blocks of information.
Radio	Used to select one of several options. Only one radio button can be selected at a time.
Checkbox	Used to enable or disable features or options.
Pull-down list	Used to select a field value from a list of pre-defined values. A down arrow in the right side of the field indicates that the field has a pull-down list.

## Blocks

A block is a section of a form or window that contains related information. If a form or window contains more than one block, each block (except the key block) may be enclosed in a beveled box.

### Blocks:

- Group information together
- Can be one or more on a screen
- May be organized on tabs within a form
- Think of them as “sections” on a form

For example, a student’s record in SPAIDEN contains the following blocks: Current Identification (A), Person Name Information (B), and Non-Person Information (C).

There are two types of blocks, a Key Block and an Information Block

### Key Block

- The place you start on a form.
- Every form has a Key Block.
- A unique code is entered such as an ID number, term code or document number.
- Lets Banner know what piece of information you want to retrieve.
- The rest of the information on the form will refer to the information that you enter on the Key Block.

### Information Block

- Section that contains related information to what was entered in the Key block.
- A line may separate each Information block on the form.

## Navigating Blocks

To navigate in between blocks or tabs, you would use the Next Block or Previous Block functions. These are icons located on the Tool Bar in a form. If you prefer to use keystrokes for navigation, you can use Ctrl-Page Down to reach the Next Block or Ctrl-Page Up for the Previous Block.

Next Block



Previous Block



## Fields

Fields are labeled space within a block. You can enter, query, change and/or display specific information within a field.

There is usually more than one field on a form. Below is an example of a form and some of its fields have been marked as examples.

The screenshot shows a web application window titled "General Person Identification SPAIDEN 0.2R (KBANP)". At the top, there is an "ID:" field containing "U00294852" and a text field containing "Tigerpaw, Lily". To the right is a "Generate ID:" button. Below this is a navigation bar with tabs: "Current Identification", "Alternate Identification", "Address", "Telephone", "Biographical", "E-mail", "Emergency Contact", and "Additional Identification". The "Current Identification" tab is active. Below the navigation bar, there is an "ID:" dropdown menu showing "U00294852" and a "Name Type:" dropdown menu. The form is divided into two main sections: "Person" and "Non-Person". The "Person" section includes fields for "Last Name" (containing "Tigerpaw"), "First Name" (containing "Lily"), "Middle Name", "Prefix", "Suffix", "Preferred First Name", and "Full Legal Name". There is an "Override Name Parse" checkbox. The "Non-Person" section includes a "Name:" field. To the right of the "Person" section is the "ID and Name Source" section, which includes "Last Update" information: "User:" (U0MRPT), "Activity Date:" (16-MAR-2010), and "Origin:" (GOAMTCH). Below this is the "Original Creation" section: "User:" (U0MRPT) and "Create Date:" (16-MAR-2010). Several fields are highlighted with red boxes: the "Last Name" field, the "Name:" field in the "Non-Person" section, the "User:" field in "Last Update", and the "User:" field in "Original Creation".

### Field States

A field can be in one of two different states on a form: Enabled or Disabled.

#### Enabled

- Cursor is allowed in the field.
- Information in the field is displayed in black text.

#### Disabled

- Cursor is not allowed in the field.
- If information exists, it cannot be changed.

**NOTE: YOU MAY NOT BE ABLE TO NAVIGATE TO ALL FIELDS WITHIN A FORM. ON QUERY ONLY FORMS, YOU FREQUENTLY CANNOT MOVE THROUGH ANY FIELDS AT ALL.**

## Field Values

Any data that is entered or displayed in a field is a value. There are two types of values as detailed in the chart below.

**NOTE: THE NAMES OF THE FIELDS THAT HAVE A PRE-DEFINED VALUE, OR LOV, HAVE A DROP DOWN ARROW NEXT TO THE FIELD. FIELDS THAT YOU CAN SEARCH FOR A VALUE IN THE DATABASE ALSO HAVE A DROP-DOWN ARROW NEXT TO THE FIELD. THE MOST COMMON EXAMPLE IS THE ID FIELD ON THE %IDEN FORMS.**

<b>Citizenship:</b>	<input type="text" value="Y"/>	<input type="button" value="▼"/>	US Citizen
<b>Marital Status:</b>	<input type="text" value="S"/>	<input type="button" value="▼"/>	Single
<b>Religion:</b>	<input type="text" value="NO"/>	<input type="button" value="▼"/>	No Preference

Type	Description	Example
Free-format	Free access to type in whatever information is required.  Not previously defined on a validation form.	Street addresses
List of Values (LOV)	Data on the LOV comes from previously defined values on a validation form.  When you double-click on a LOV field. Use a Search icon or press the F9 key, previously defined values are displayed.	State codes – FL, PA, DE
Search Field	If a field is a search field you must click the search icon to search.	ID, Last Name, First Name



## Navigating Fields

To navigate between fields, use the next and previous field keystrokes as detailed below.

Function	Command
Next Field	Tab OR Enter
Previous Field	Shift + Tab

**NOTE: YOU MAY ALSO NAVIGATE BETWEEN FIELDS USING THE ITEM PULL-DOWN MENU ON THE MENU BAR.**

## Chapter 4: Searching

### Search using a Wildcard

A wildcard is a special character that represents one or more other characters. Use wildcard symbols % and \_ in the search criteria.

- % (percent sign) represents any number of characters
- \_ (underscore) represents one occurrence of a character

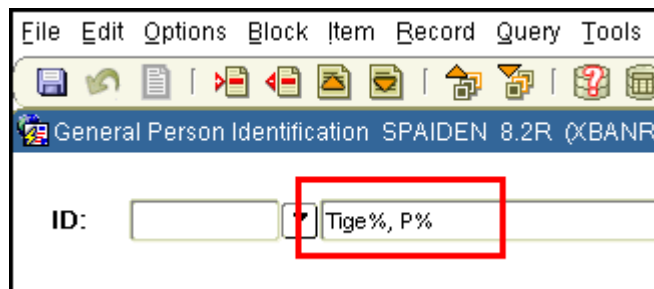
**NOTE: MA IS USED AS AN EXAMPLE. THE WILDCARD SYMBOLS CAN BE USED WITH ANY COMBINATION OF LETTERS IN ANY ORDER.**

To get these results...	Enter these criteria...
All entries that contain ma	%ma%
All entries that begin with ma	ma%
All entries that end with ma	%ma
All entries that have m as a second character	_m%

1. Press Tab to place the cursor within the *Name* field.

Type as much of the name as possible and then place % at the end to signal where you are unsure of the values. The screen shot below shows an example.

Press Enter when you are ready to search. The *ID and Name Extended Search* window will appear.



2. Click on the *Search Results* field drop down (A); the list of results will appear.

If the Wildcard produced too many results for you to determine the correct user, additional search criteria may be entered into this window; see the screen shot below (B).

After entering additional criteria, click the magnifying glass icon (C) to continue the search. The new results can be viewed within the Search Results drop down (A).

The screenshot shows a search window titled "ID and Name Extended". At the top, a search results dropdown menu (A) is open, displaying two entries: "Tiger, Pouncer A. U00322859" and "Tiger, Pouncer U00322858". Below this, the "Search Results:" label is followed by a blue bar and a page number "2". The main search area is divided into "Person Search Detail:" and "Non-Person Search Detail:". Under "Reduce Search By", there are radio buttons for "Person", "Non-Person", and "Both" (which is selected). A text prompt reads "Enter search criteria then press Execute Query or select button to reduce search." (C). Below this are input fields for "City:", "State or Province:", "ZIP or Postal Code:", "Name Type:", "SSN/SIN/TIN:", "Birth Date:", and "Gender:". A magnifying glass icon (C) is located to the right of these fields. A red bracket (B) groups the "City:", "State or Province:", "ZIP or Postal Code:", and "Name Type:" fields. At the bottom, a text prompt reads "Press Enter Query or select button to clear search." The window title bar includes "Original Creation".

## Object Search

You can use Object Search to access a form if you know part of its name, description, or type.

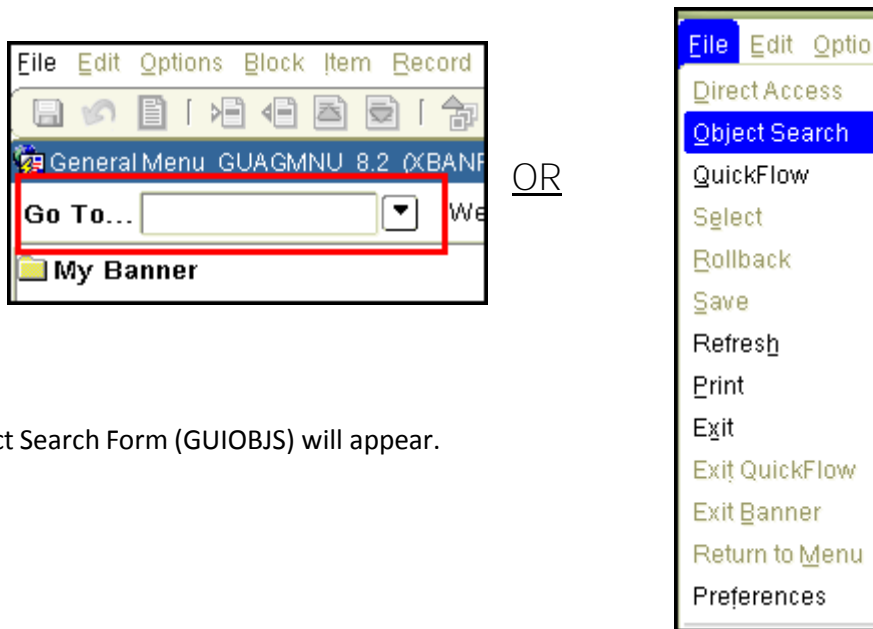
When you use Object Search from a form, the current form remains open. When you exit the requested object, you return to the original form.

**NOTE: YOU CANNOT SEARCH FOR AN OBJECT USING CODE/DESCRIPTION LOOKUP IN THIS FIELD. YOU CAN, HOWEVER, SEARCH BY SELECTING THE SEARCH BUTTON AND THEN PERFORMING YOUR SEARCH ON GUIOBS.**

### To use Object Search:

1. Double-click the Go To... field on the main menu OR Select File > Object Search from any form.

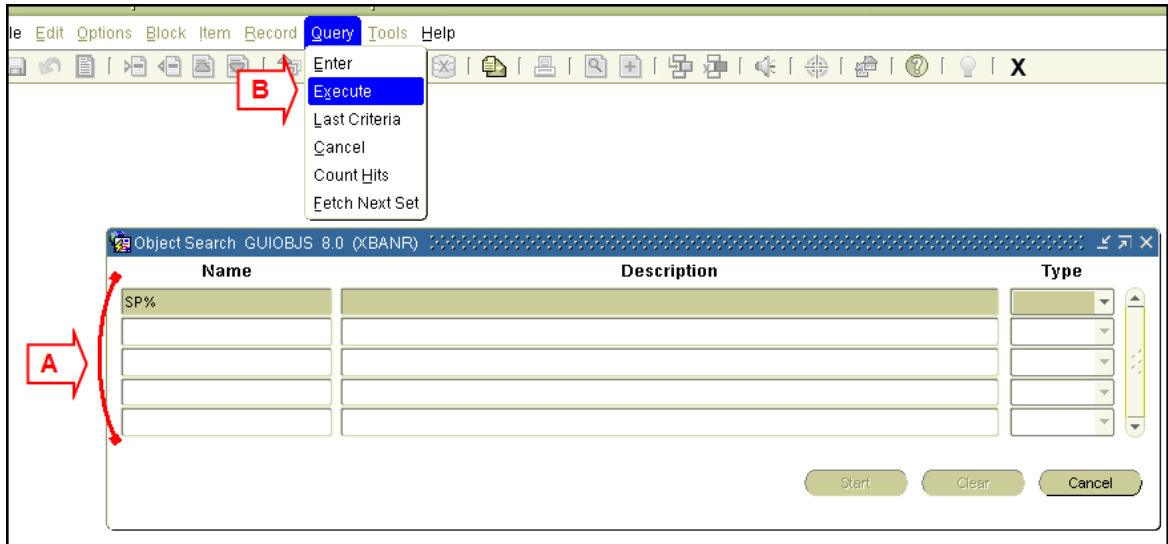
**NOTE: YOU CAN USE THE UP AND DOWN ARROW KEYS WITHIN THE GO TO FIELD TO SCROLL THROUGH FORMS THAT YOU HAVE PREVIOUSLY ACCESSED IN THE BANNER SESSION. PRESS ENTER TO GO TO THAT FORM.**



The Object Search Form (GUIOBS) will appear.

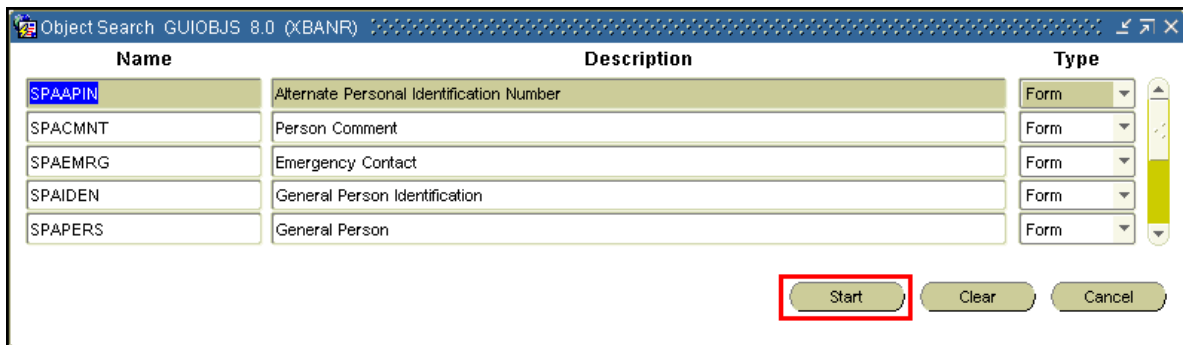
2. Enter your search criteria on the *Object Search* form (A). You can use any or all of the *Name*, *Description*, and *Type* fields. You can use the Oracle wildcards % and \_.

Select Query > Execute (also known as Execute Query) (B). A list of all matches will appear.



3. Find the desired name. You may need to use the scroll bar on the right side depending on list length.

Double-click the desired name or click Start. The object selected will appear.



## Querying the Database

To look up information in a database, you perform a query. In Banner, this is accomplished by entering the search criteria into a form and executing the query. Inquiry and query forms are designed for this purpose, but you can also execute a query from most of the application forms.

### Wildcard Characters






Wildcard characters can be useful when performing queries. A wildcard is a special symbol that represents one or more characters. This enables you to enter search criteria in a query form without having to type the entire word or phrase you are searching for. Wildcards will also allow you to find multiple records with a single query.

Banner allows the use of two wildcard characters: the percent sign (%) and the underscore (\_). The % represents any combination of characters. The \_ represents a single occurrence of any character.

To obtain these search results	Enter this as your search criteria
All entries containing the characters ha	%ha%
Entries beginning with the characters ha	ha%
Entries ending with ha	%ha
Entries where h is the second character	_h%

### Query Functions

The following functions are used to perform queries in Banner. The Enter, Execute, and Cancel functions are available via icons on the Horizontal Tool Bar. They are also available on the Query pull-down menu, along with the rest of the Query functions.

Enter 	Erases any search results that may already be displayed in the form and allows you to “enter” your search criteria. The phrase “Enter Query” appears in the status line.
Execute 	Used after you have entered your search criteria, this function searches the database and displays the results of the query.
Last Criteria 	Causes the search criteria from your last search to be entered in the form. Any of the criteria can be changed prior to executing the query.
Cancel 	Cancels the query if the form is in query mode or exits the form (if not in query mode).
Count Hits 	Counts the number of records that will be returned by the search criteria. This number is displayed in the Auto Hint Line.

Fetch Next Set      Replaces records currently displayed in the window with the next set of records that match the search criteria.

## Perform a Basic Query

1. Open the form you will use to execute the query.
2. If the form opens in query mode (i.e., the form contains no search results, and the phrase “Enter Query” is displayed in the status line), go to step 3.

If the form opens already displaying search results, click **Query/Enter** or the **Enter Query** button on the Horizontal Tool Bar.

3. Input the search criteria. It is possible to search for information in any field that you can access. It is unnecessary to type the complete search criteria if you use the Banner wildcard characters % and \_. Queries in Banner are usually case-sensitive, so enter your search criteria according to the way the data you are searching has been input.
4. Click **Query/Execute** or the **Execute Query** button on the Horizontal Tool Bar. All records that match the search criteria will be displayed on the form.

## Multiple Methods to Perform Functions and Tasks

A function or task is an activity performed on a Banner form. There are a variety of different ways to perform functions or tasks: click an icon/button, click a pull-down menu selection, or press a keystroke combination.





The method used to perform actions in Banner is entirely up to the user. The correct keystroke combination will afford the same end result as clicking an iconic button or a pull-down menu. While many functions or tasks can be accomplished with a choice of three techniques to perform them, not every action has all three choices (corresponding buttons, keystrokes, and pull-down menus).

### Keystrokes











Keystrokes used to perform functions or tasks can be found by clicking **Help/Show Keys** or pressing **Ctrl+F1** keys.

### Iconic Buttons

In addition to the standard Windows response buttons (Yes, No, OK, Cancel, Exit, etc.), Banner utilizes iconic buttons that are unique to the Banner system. Iconic buttons are simply small squares that contain a picture (icon). These buttons are not displayed on the Horizontal Tool Bar. They are displayed within the forms as you navigate through the Banner system.

<b>Iconic Button</b>	<b>Function / Task</b>	<b>Description</b>
	Approve	Indicate the process is approved.
	Disapprove	Indicate the process is not approved.
	Calculate	Perform a calculation on data in the current field.
	Calendar	Open the Banner Calendar window.



	Comments	Open a freeform text box to enter comments regarding the current record.
	Complete	Indicate the process is completed.
	In Process	Indicate the process is started but not yet complete.
	Copy	Copy the current record(s).
	Data	Indicate that data is available for the current field.
	No Data	Indicate that no data is available for the current field.
	Detail	Display detailed information for the current record.
	Summary	Display summary information for the current record.
	Maintenance	Update information in the database.
	Search	Display a query form or window that allows a search for information associated with the current field.

## Features Distinctive to Banner

### List of Values (LOV)

As you create or modify records in the Banner database, you will encounter fields that accept only specific codes or values. These fields display a Search button (  ) immediately to the right. The Search button is an indicator that the field may have an associated List of Values (LOV). The LOV for the field contains all possible values that are acceptable for the field. These values are stored in a Banner Validation form, and the entire LOV can be viewed by clicking the Search button or double-clicking in the field box itself.

To input the correct value in a field controlled by a LOV, use one of the following methods:

- Type the value or code in the field box, if known.
- Type as much as you know of the desired value and use the Banner wildcard characters % or \_ to search for the code.
- Click the Search button (  ) next to the field or double-click in the field box to view the entire LOV. Scroll through the LOV to find and select the desired value.


### QuickFlows

QuickFlow is the Banner term that refers to a group of forms linked together in a chain. Linking forms allows the user to be automatically directed to the next form in the chain once they have finished with the previous form. This ensures that no steps are missed in a process, and eliminates the need for the user to remember which form should be used in what order.

QuickFlow, like other Banner forms, have a short name (usually 3-4 characters) and a Description. To start a QuickFlow, the short name can be entered in the Direct Access box on the General Menu. If the short name is not known, use Object Search to locate the QuickFlow with a partial short name or Description, combined with the Banner wildcard character (%). To see a list of all QuickFlow, go the *QuickFlow Form (GUAQFLW)* form and click the search button to view the list.

## Rollback

Rollback clears all information displayed in the information block and allows you to return to the Key Block. Once in the Key Block, you are able to search for and select a different record to work with or display in the form.

The Rollback button (  ) is available on the Horizontal Tool Bar, or you may click **Rollback** on any Options window or the **File** pull-down menu. If modifications to data have not been saved prior to returning to the Key Block, Banner will prompt you to save your changes.

# APPENDIX A

## Form Naming Conventions

Banner forms, reports, jobs, and tables are given long descriptive names and short 7-character names. Knowing how to decipher the 7-character name can tell you a lot about the purpose of a form. The naming conventions for the Banner products purchased by NSU are included in this appendix: Student, Finance, Human Resources, Financial Aid, and General.

## Student

<b>Position 1</b> Identifies the primary system that owns the form, report, job, or table.	
<b>S</b>	<b>Student</b>

<b>Position 2</b> Identifies the module within the primary system that owns the form, report, job, or table.	
A	Admissions
C	Catalog
E	Support Services
F	Registration/Fee Assessment
G	General Student
H	Grades/Academic History
I	Faculty Load
L	Location Management
M	CAPP
O	Overall
P	Person
R	Recruiting
S	Schedule
T	Validation Form/Table
U	Utility
W Y Z	Reserved for client-developed forms or modules. (Character in position 1 not = W, Y, Z.)

<b>Position 3</b> Identifies the type of form, report, job, or table.	
A	Application Form
B	Base Table
I	Inquiry Form
P	Process
Q	Query Form
R	Rule Table
	Repeating Table
	Report or Process
V	Validation Form/Table
	View

**Positions 4, 5, 6, 7**  
identifies unique, four character name for the form, report, job, or table.

### EXAMPLES:

Form Name	<b>S</b>	<b>P</b>	<b>A</b>	<b>I</b>	<b>D</b>	<b>E</b>	<b>N</b>
Letter Position	1	2	3	4	5	6	7

**S** Student  
**P** Person  
**A** Application  
**IDEN** Identification

Description: *General Person Identification Form*

Form Name	<b>S</b>	<b>H</b>	<b>R</b>	<b>R</b>	<b>O</b>	<b>L</b>	<b>L</b>
Letter Position	1	2	3	4	5	6	7

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

Description: *Grade Roll to Academic History Report*

# Finance

<b>Position 1</b> Identifies the primary system that owns the form, report, job, or table.	
<b>F</b>	<b>Finance</b>

<b>Position 2</b> Identifies the module within the primary system that owns the form, report, job, or table.	
A	Accounts Payable
B	Budget Development
C	Cost Accounting
E	Electronic Data Interchange
F	Fixed Assets
G	General Ledger
I	Investment Management
N	Endowment Management
O	Operations
P	Purchasing/Procurement
R	Research Accounting
S	Stores Inventory
T	Validation Form/Table
U	Utilities
X	Archive/Purge
W	Reserved for client-developed forms or modules. (Character in position 1 not = W, Y,Z.)
Y	
Z	

<b>Position 3</b> Identifies the type of form, report, job, or table.	
A	Application Form
B	Base Table
I	Inquiry Form
M	Maintenance Form
Q	Query Form
R	Rule Table
	Repeating Table
	Report or Process
V	Validation Form/Table
	View

**Positions 4, 5, 6, 7,**  
Identifies a unique, four character name for the job, or table.

**EXAMPLES:**

Form Name	<b>F</b>	<b>O</b>	<b>I</b>	<b>D</b>	<b>O</b>	<b>C</b>	<b>H</b>
Letter Position	1	2	3	4	5	6	7

- F** Finance
- O** Operations
- I** Inquiry
- DOCH** Document History

Description: *Document History Form*

Form Name	<b>F</b>	<b>G</b>	<b>R</b>	<b>A</b>	<b>C</b>	<b>T</b>	<b>H</b>
Letter Position	1	2	3	4	5	6	7

- F** Finance
- G** General Ledger
- R** Report
- ACTH** Account Hierarchy

Description: *Account Hierarchy Report*

## Human Resources

<b>Position 1</b> Identifies the primary system that owns the form, report, job, or table.	
<b>N</b>	<b>Position Control</b>
<b>P</b>	<b>Human Resources/ Payroll/ Personnel</b>

<b>Position 2</b> Identifies the module within the primary system that owns the form, report, job, or table.	
A	Application
B	Budget
C	COBRA
D	Benefits/Deductions
E	Employee
H	Time Reporting/History
O	Overall
P	General Person
R	Electronic Approvals
S	Security
T	Table (Validation or Rule)
U	Utility
X	Tax Administration
W Y Z	Reserved for client-developed forms or modules. (Character in position 1 not = W, Y, Z)

<b>Position 3</b> Identifies the type of form, report, job, or table.	
A	Application Form
B	Base Table
	Batch COBOL Process
I	Inquiry Form
P	Process
R	Rule Table
	Repeating Table
	Report or Process
V	Validation Form/Table

**Positions 4, 5, 6, 7,**  
Identifies a unique, four character name for the job, or table.

### EXAMPLES:

Form Name	<b>P</b>	<b>H</b>	<b>R</b>	<b>D</b>	<b>I</b>	<b>R</b>	<b>D</b>
Letter Position	1	2	3	4	5	6	7

**P** Personnel  
**H** Time Reporting/History  
**R** Report  
**DIRD** Direct Deposit

Description: *Direct Deposit Distribution Report*

Form Name	<b>N</b>	<b>B</b>	<b>A</b>	<b>P</b>	<b>O</b>	<b>S</b>	<b>N</b>
Letter Position	1	2	3	4	5	6	7

**N** Position Control  
**B** Budget  
**A** Application  
**POSN** Position Definition

Description: *Position Definition Form*

## Financial Aid

### Position 1

Identifies the primary system that owns the form, report, job, or table.

<b>R</b>	<b>Financial Aid</b>
----------	----------------------

### Position 2

Identifies the module within the primary system that owns the form, report, job, or table.

B	Budgeting
C	Record Creation
E	Electronic Data Exchange
F	Funds Management
H	History and Transcripts
J	Student Employment
L	Logging
N	Need Analysis
O	Common Functions
P	Packaging and Disbursements
R	Requirements Tracking
S	Student System Shared Data
T	Validation Form/Table
U	Utility
W Y Z	Reserved for client-developed forms or modules. (Character in position 1 not = W, Y,Z.)

### Position 3

Identifies the type of form, report, job, or table.

A	Application Form
B	Base Table
I	Inquiry Form
P	Process/Report
R	Rule Form
	Repeating Rules Table
	Report
T	Temporary Table
V	Validation Form/Table
	View

### Positions 4, 5, 6, 7,

Identifies a unique, four character name for the job, or table.

### EXAMPLES:

Form Name	<b>R</b>	<b>O</b>	<b>A</b>	<b>I</b>	<b>N</b>	<b>S</b>	<b>T</b>
Letter Position	1	2	3	4	5	6	7

**R** Financial Aid  
**O** Common Functions  
**A** Application  
**INST** Institutional Options

Description: *Institution Financial Aid Options Form*

Form Name	<b>R</b>	<b>T</b>	<b>V</b>	<b>A</b>	<b>W</b>	<b>S</b>	<b>T</b>
Letter Position	1	2	3	4	5	6	7

**R** Financial Aid  
**T** Table  
**V** Validation  
**AWST** Award Status

Description: *Award Status Validation Form*



## Advancement

### Position 1

Identifies the primary system that owns the form, report, job, or table.

**A** Advancement

### Position 2

Identifies the module within the primary system that owns the form, report, job, or table.

A	Membership
D	Designation
E	Event Management
F	Campaign
G	Pledge & Gift/Pledge Payment
L	Label
M	Prospect Management
O	Organization
P	Constituent/Person
S	Solicitor Organization
T	Validation Form/Table
U	Utility
X	Expected Matching Gift
W Y Z	Reserved for client-developed forms or modules. (Character in position 1 not = W, Y, Z.)

### Position 3

Identifies the type of form, report, job, or table.

A	Application Form
B	Base Table
C	Called/ List Form
I	Inquiry Form
P	Process/Report
Q	Query Form
R	Repeating Rules Table
T	Temporary Table
V	Validation Form or View

### Positions 4, 5, 6, 7

identifies unique, four character name for the form, report, job, or table.

### EXAMPLES:

Form Name	<b>A</b>	<b>P</b>	<b>A</b>	<b>I</b>	<b>D</b>	<b>E</b>	<b>N</b>
Letter Position	1	2	3	4	5	6	7

Form Name	<b>A</b>	<b>G</b>	<b>P</b>	<b>A</b>	<b>C</b>	<b>K</b>	<b>N</b>
Letter Position	1	2	3	4	5	6	7

**A** Advancement  
**P** Person  
**A** Application  
**IDEN** Identification

**A** Advancement  
**G** Gift & Gift/Pledge Payment  
**P** Process/Report  
**ACKN** Acknowledgement Process

Description: *General Person Identification Form*

Description: *Acknowledgement Process*

# General

<b>Position 1</b> Identifies the primary system that owns the form, report, job, or table.	
<b>G</b>	<b>General</b>

<b>Position 2</b> Identifies the module within the primary system that owns the form, report, job, or table.	
E	Event Management
J	Job Submission
L	Letter Generation
O	Overall
P	Purge
S	Security
T	Validation Form/Table
U	Utility
X	Cross Product
W Y Z	Reserved for client-developed forms or modules. (Character in position 1 not = W, Y,Z.)

<b>Position 3</b> Identifies the type of form, report, job, or table.	
A	Application Form
B	Base Table
	Batch COBOL Process
I	Inquiry Form
O	On-Line COBOL Process
Q	Query Form
R	Rule Table
	Repeating Table
	Report or Process
T	General Maintenance
	Temporary Table
V	Validation Form/Table
	View

**Positions 4, 5, 6, 7,**  
Identifies a unique, four character name for the job, or table.

**EXAMPLES:**

Form Name	<b>G</b>	<b>U</b>	<b>A</b>	<b>U</b>	<b>P</b>	<b>R</b>	<b>F</b>
Letter Position	1	2	3	4	5	6	7

**G** General  
**U** Utility  
**A** Application  
**UPRF** User Preferences

Description: *General User Preferences Maintenance Form*

Form Name	<b>G</b>	<b>T</b>	<b>V</b>	<b>C</b>	<b>U</b>	<b>R</b>	<b>R</b>
Letter Position	1	2	3	4	5	6	7

**G** General  
**T** Validation Form/Table  
**V** Validation Form/ Table  
**CURR** Currency

Description: *Currency Codes Validation Table*

## Help and Online Assistance

There are various types of assistance available:

- Auto Hint (mentioned previously)
- Help Center
- Online Help

### Help Center

The Help Center is electronic documentation delivered by SunGard Higher Ed and is available for many forms. Please note that this documentation is baseline, which means that if NSU modified a form, this will not be reflected in the documentation. Also note that if online help exists for a form, there will be no information for that form in the Banner documentation.

To access the Help Center, click Help Center next to the Site Map button at the top-right hand side of the screen. For assistance, please send an e-mail to [help@nsuok.edu](mailto:help@nsuok.edu).

### Online Help

The Online Help system is the online information for Banner forms, windows, blocks, and fields. You can access Online Help by choosing Help from the Main Menu and then selecting Online Help from the drop-down menu that appears.

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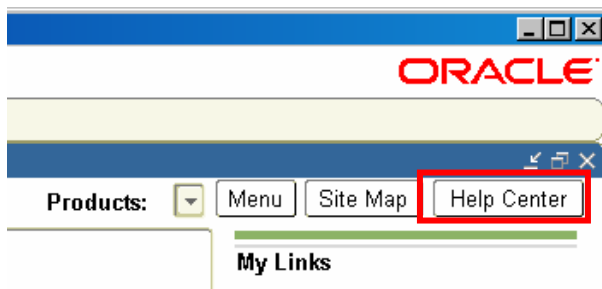
**Help icon**      You can use the **Online Help** Tool Bar icon to access online help.



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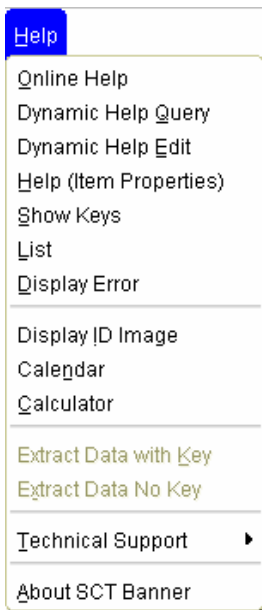
### Help Center link

You can access online help from the Banner main menu by clicking the **Help Center** link.



## Using Help

**Help menu** The **Help** pull-down menu contains the various help options.



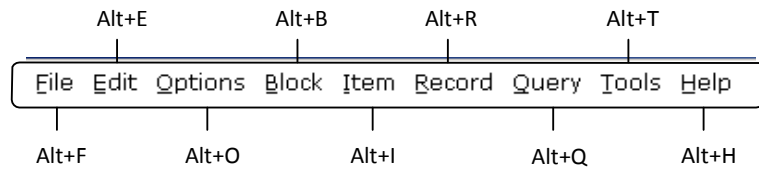
Option	Purpose
Online Help	Displays online information for the current field or form.
Dynamic Help Query	Displays the Dynamic Help Form (GUAHELP) in query mode, which is used to display traditional help for a field, block, or form.
Dynamic Help	Edit Displays the Dynamic Help Form (GUAHELP) in edit mode, which is used to edit traditional help for a field, block, or form.
Banner Bookshelf	Provides electronic access to hardcopy Banner documents directly from your computer.
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.
Display Error	If an Oracle error occurs, displays the code that is in error.
Display ID Image	If the cursor is in an ID field, displays the image associated with the ID, if available.

Option	Purpose
Calendar	Displays the Calendar Form (GUACALN), showing a calendar with the current month open by default.
Calculator	Accesses the Calculator Form (GUACALC), which functions as a calculator. You can use the mouse, number keys on the keyboard, or the numeric keypad to make calculations.
Extract Data with Key	Extracts Banner data for the current block, with key data, to a spreadsheet.
Extract Data No Key	Extracts Banner data for the current block, without key data, to a spreadsheet.
Technical Support	Contains three sub-menu options. The first two options allow you to turn the SQL Trace feature on and off. SQL Trace is a tool that helps your technical support staff track performance issues. The last option allows you to reconnect to the database if necessary.
About Banner	Displays a list of installed Banner products, their release number, and their installation date. This information will be helpful if you need to contact the ActionLine with a question.

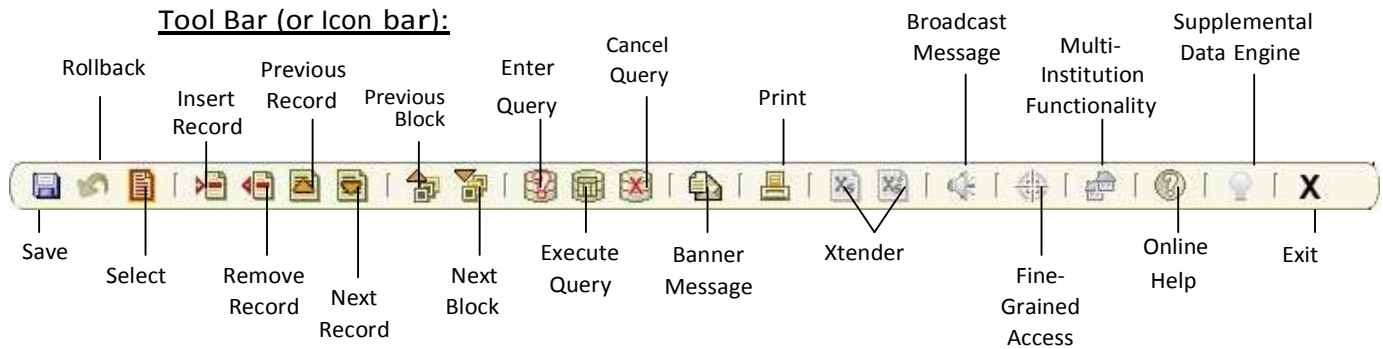
## Banner Navigation Short Cut Keys

There are numerous keyboard short cuts available in BANNER. The specific keystrokes for a function depend on your environment. The Show Keys command in the Help Menu lists the keyboard equivalents available in your environment for the current form, window and field. In addition, the **Alt** key gives quick access to the Menu Bar items.

### Menu Bar:



### Tool Bar (or Icon bar):



### Banner Shortcut Keys

Function	Shortcut Key	Function	Shortcut Key
File Save	F10	Block Next	Ctrl + PageDn
File Rollback	Shift + F7	Block Previous	Ctrl + PageUp
File Exit	Ctrl + Q	Block Clear	Shift + F5
Query Enter	F7	List of Values	F9
Query Execute	F8	Display Error	Shift + F1
Query Cancel	Ctrl + Q Query	Show Keys	Ctrl + F1
Count Hits	Shift + F2	Print Screen	Shift + F8
Record Next	↓ or PageDn Record	Field Next	Tab
Previous	↑ or PageUp Record	Field Previous	Shift + Tab Field
InsertF6		Clear	Ctrl + U Field
Record Duplicate	F4	Duplicate	F3
Record Clear	Shift + F4	Save	F10
Record Remove (delete)	Shift + F6	Rollback	Shift + F7
Select Record	Shift + F3	Options Menu	Right Click or F2
		Direct Access bar	F5

## Appendix B

### Banner General Rules for Clean and Accurate Records

- ✓ **Search first.** Before creating a new record for a person or organization, conduct an identification and name search to make sure the person or organization has not already been entered into the Banner system. Search for a person or vendor using social security number or federal ID number, birth date (if available), and all current and previous names. Then verify that the correct record has been found by checking pertinent information such as the birth date and/or address. Only if no record is found should you add a new record.
- ✓ **Changes may impact other modules.** A common institutional database offers the potential for better service and convenience to our constituents and greater accuracy across the institution. Simultaneously, each administrative position must be cognizant of data integrity requirements of other institutional departments in its practices. Name change practices are a key example where specific policies must be followed depending on the type of record. Whenever a constituent requests a name change it is necessary to determine in which modules the record occurs.
- ✓ **Special symbols.** Never store the percent symbol (%) in a data field. Never store the ampersand symbol (&) except in an address or business name. In addition, avoid the use of other special symbols such as #, @, \*, \_ /, ", =, >, and < whenever possible as these may interfere with programs running behind the scenes.
- ✓ **Check abbreviations.** Spell out all data unless it is necessary to abbreviate words to fit lines into the appropriate fields. Exceptions are made for items in addresses, such as directionals (NE, SW) and street suffixes (St for Street, Ave for Avenue). When abbreviating, use the standard abbreviations as specified in the Data Standards Manual. DO NOT use a period after an abbreviation.
- ✓ **Use mixed case.** Enter all data using mixed case and standard capitalization rules. Names and addresses in Banner should have a customer-friendly appearance. The objective is to enter names and addresses with mixed case (both upper and lowercase letters) so that when a name or address is printed on correspondence, it looks contemporary and professional.
- ✓ **Data entry rules.** Remember that some data fields have specific data entry rules. Those rules are outlined in the appropriate section of the Data Standards Manual.
- ✓ Refer to the Data Standards Manual for detailed information about Addresses in NSU's Banner system.

#### General Information about Names

- ✓ A person's legal name appears on official documents such as a birth certificate, court order, social security card, marriage license or passport. The Office of Admissions uses the name reported on an application as the legal name. Human Resources Office requires official documents.
- ✓ Name formats have also been developed to meet postal regulations. It is recommended that offices that collect person names on applications, or any other types of forms, designate separate fields on the form for that person to indicate first name, middle name and last name. This will facilitate our ability to enter a name correctly into the respective fields in Banner.
  
- ✓ The following forms are used to enter and change name information. The form used depends upon the Banner module in use:



FORM NAME	BANNER MODULE
SPAIDEN	STUDENT, FINANCIAL AID
PPAIDEN	HUMAN RESOURCES
FTMVEND	FINANCE ('non-person' vendors)
FOAIDEN	FINANCE ('person' vendors)
APAIDEN	ALUMNI/DEVELOPMENT

- ✓ Last Name, First Name and Middle Name appear on all of the above forms. First Name and Last Name are required fields in Banner. Although Middle Name is not required in Banner, middle name should be entered for reporting purposes.
  - Person Last Name – maximum length 60 characters
  - Person First Name – maximum length 60 characters
  - Person Middle Name – maximum length 60 characters
  - Non-Person Name – maximum length 60 characters
  - Prefix, Suffix and Preferred First Name appear only on SPAIDEN, PPAIDEN and APAIDEN.

### General Information about Addresses

- ✓ Street addresses are composed of a number, the street name and a possible unit designator. Street names should be spelled out in their entirety whenever possible. Street designators should follow the standard US Post Office standards.
- ✓ The USPS prefers use of pre-direction and post-direction abbreviations without a period. These describe the geographic direction before and after the street name. Directionals should be spelled out only when they are part of the street name. (ex: 123 E North St)
- ✓ Always abbreviate Post Office Box as PO Box.
- ✓ Zip or postal codes MUST be entered for all US and Canadian addresses. If available, it should also be entered for other international addresses. For all US addresses, enter the five-digit zip code before entering the city, county, or state. If the zip code is entered correctly the city, county, and state are automatically displayed in the appropriate fields. This not only eliminates the need to key this information, but also ensures that it is correct. Note that you must enter the five-digit zip code only, then press the ENTER key (or the TAB key), which will cause Banner to fill in the city, county, and state. You can then return to the zip code to add the remaining digits for a nine-digit zip code. If you are entering a vendor or employee, you MUST enter a nine-digit zip code.
- ✓ Punctuation (periods, commas and apostrophes) should not be used. Use hyphens and slashes in addresses when needed for clarity or designated fractions.