

GENERAL NAVIGATION REFERENCE GUIDE FOR BANNER 7.X

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Effective as of: 11/21/05

Section I: Banner Basics

A. Launching Banner

• Start Internet Explorer (IE) browser by clicking on this icon on your computer:

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- Type **ebanner** in the address line
- Press Enter



The following logon box will be displayed:

Logon 2000000000000000000000000000000000000	×
Username:	
Password:	
Database:	
Connect Cancel	

- Type your Banner **Username**, which is the same as your Windows Login username. (If unable to type, please see NOTE below.)
- Tab to, or click in the **Password** field and type your Banner password. (*Do not advance to the password field by pressing the enter key this causes an error.*)
- **Database** field should be left blank.
- Press the enter key or click on the **Connect** button to complete your logon.

NOTE: If you are unable to type your username or if you logon and cannot type into a form or clicking on dropdown arrows within a form results in no list, press the **Alt+Tab keys** simultaneously until the JInitiator Security Warning window is displayed. Release the Alt+Tab keys. Click on **Grant always**. This is a one-time process, necessary once per given computer. You will then be returned to the logon window and can proceed.

JInitiator 9	Security Warning	x
S	Do you want to install and run signed applet distributed by "ebanner.easternct.edu"?	
	Publisher authenticity verified by : "Eastern Connecticut State University".	
	The security certificate was issued by a company that is not trusted.	
	The security certificate has not expired and is still valid.	
	Caution: "ebanner.easternct.edu" asserts that this content is safe. You should only install/view this content if you trust "ebanner.easternct.edu" to make that assertion.	
G	rant this session Deny Grant always View Certificate	

1

You will notice that there are actually two browser windows associated with this software. The Oracle – Web window remains maximized and is the active window. The other remains minimized. Do not close it or your Banner session will end.



B. Main or General Menu

	🏀 Oracle Developer Forms Runtime - Web		
	Eile Edit Options Block Item Record Query Tools Window Help		ORACLE
1	🕞 🖉 🖺 1 🖓 🖶 🗟 1 🎓 🖓 1 🕄 📾 🖄 1 🏝 1 📓 📓 1 🚸 1 🌒 1 🗴		
<u> </u>	General Menu GUAGMNU 7.1 (ePPRD) - Tuesday October 04, 2005		≚ ⊡ ×
2	Go To Welcome, GILLETTEE	Products: 🔽	Menu Site Map Help Center
	A My Banner		My Links
<mark>3</mark>	Student [*STUDENT]		Change Banner Password
	Advancement [*ALUMNI]		Check Banner Message
	Einance System Menu [*FINANCE]		Dercenal Link 1
	🗎 Human Resources [*HRS]		Personal Link 1
	Financial Aid [*RESOURCE]		Personal Link 2
	🗀 General [*GENERAL]		Personal Link 3
	Banner Broadcast Messages 05-0CT-2005 Welcome to Banner 7!! Messages regarding Banner availability will be posted here.		System messages are displayed here.
			<u> </u>

- **Go To...(direct access to a form) 1** If you know the name of the form that you wish to access, type the seven character form name in the Go To... field and press the enter key. The desired object will open, assuming the proper authorization has been granted.
- **My Banner 2** Initially this folder is empty. To ease navigation, 'My Banner' can be customized to include forms that are accessed on a regular basis.

Adding forms to My Banner:

- Go To... a form routinely accessed
- While form is displayed, Right click anywhere outside of a field. Options menu is displayed.
- Click on Add to Personal Menu.
- \circ Press **X** on horizontal tool bar or Cntrl +q to Exit the form.
- Type Refresh in the Go To... field and Press enter.
- Double click on 'My Banner' and the new form should display in the My Banner menu.

Identification Form SPAIDEN 7.0.0.1 (ePPRD) 20203000000000000000000000000000000000	Generate ID:	₩ ₩	
Current Identification Alternate Identification Address ID: Name Type:	Telephone Biograp	hical E-	Options Box: Right
Person	Exit Print Add to Personal Menu	ID and Name	field on a form to display.
Last Name: First Name: Middle Name: Prefix: Suffix:	Current Identification Alternate Identification Address Ielephone Biographical	Last Update User: Activity Date: Origin:	

• **SCT Banner 3** – double click on SCT Banner to view the sub-folders available for a specific module i.e., Student, Alumni, Finance, HRS, etc. Double click on the folders to view various forms that pertain to each module.

C. Setting Personal Preferences

If you prefer to have 'My Banner' expanded (showing list of customized forms)

- Click <u>File</u> on the Main menu bar
- Click Preferences



The following General User Preferences Maintenance form is displayed:

Display Options Directory Options My Links	Menu Settings LDAP	
Display Options	User Interface Color Settings	
✓ Display Form Name on Title Bar	Description: Enter the RGB color code for non iconic buttons. Default Value: r211g211b211	
 Click on Menu Settings tab Type *PERSONAL in the Us Press enter Click on SAVE 	lser Default field	
🔚 🔊 📄 í 🔎 🖨 🖻 📄 í 🎓 🙀 General User Preferences Mainten.) 🚰 [🚰 📾 🔀 [📤 [📇 [🐱 🖼 [🐗 [🕀 [🛞] 🗙 hance GUAUPRF 7.1 (ePPRD) XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	
Display Options Directory Option	ns My Links Menu Settings LDAP	
Starting Menu Option		
Description: Enter the name	ame of your preferred start-up menu.	
Institution Default: *MENU	Products Menu	
User Default: *PERSONAL		

For this option to take effect, you must log off and log back into Banner.

D. My Links 4 – Customization of the Personal Links

Click on the My Links tab on the General User Preferences Maintenance form to create a
personalized group of links. (File → Preferences)

🙀 General User Pre	ferences Maintenance GU	JAUPRF 7.1 (e	PPRD) 00000000					
		L L						
Display Options	Directory Options	My Links	Menu Settings	LDAP				
Description:	Enter the URL for the "My	Institution" link.						
Default Value:	http://www.easternct.edu							
User Value:		The link descriptions						
					followed by the URL or			
Description:	Enter the description for t	he "My Personal	Link 1" link.		Banner Object (form) of			
Default Value:	Your first personal link de	scription			each description are listed			
User Value:	GOOGLE SEARCH		in pairs.					
Description:	Enter the URL or Banner o	bject for the ""	Up to 6 personal links can					
Default Value:	Your first personal link UR	L	be customized.					
User Value:	http://www.google.com							

- Type a User Value description
- Type a User Value form name or URL
- Click Save
- Exit Form
- Log off and log back into Banner. Paired links will display as My Personal Links.

E. Online Help

• Click on Help and then Online Help to access the SCT Banner Help Center

🏙 Oracle Developer	Forms Runtime - We	b				
Eile Edit Options	<u>B</u> lock Item <u>R</u> ecord	Query <u>T</u> ools	<u>W</u> indow	Help		
🔲 🔌 🖹 🛛 🝋 🤇	🗗 🖻 토 í 🎓 🍯 ferences Maintenand	🔁 1 (ePPRE	Online H Dynamic Dynamic Help (Ite	lelp : Help Query : Help <u>E</u> dit :m Properties)	◎ 「 X 0000000000	
Display Options	Directory Options	My Links	Me	Show Ke List	995	
Display Optic	ons	Use	Display I	Error	tings	

F. Exiting Banner

- Click the "X" icon on the end of the horizontal toolbar
- or click "File" on the menu bar \rightarrow click on "Exit" in the drop down list
- Click yes to confirm that you do want to exit the Banner session.

II. Navigation Review

This document is intended to serve as a review and reference guide to reinforce what was covered during Banner navigation training and as a handy on-the-job reference tool.

Menu Bar	Eile Edit Options Block Item Becord Query Iools Window Help ORACLE D D D D D D D D D D D D D D D D D D D	←	Title Ba
Key Block →	ID: 🔽 Generate ID: 🖗		
Tabbed Navigation	Current Identification Address Telephone Biographical E-mail Emergency Contact ID: Name Type: Person Last Name: First Name: Middle Name: Prefix: Suffix: Prefix: Suffix: Preferred First Name: Full Legal Name: Non-Person Name: Original Creation User: Create Date:		
Auto Hint>	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 <08C>		

A. Parts of a Form

		Men	u Bai	r			The r that equiv	nenu offer a /alent	bar, lo an arra keyst	ocate ay of roke	d at th functi or a c	he top (ions, m lick of t	of ever ost of the mo	ry form which o ouse.	, cont can al	ains p so be (ull-down done wit	menus h an	
		Hori	zonta	al To	olba	ır	The funct funct Placin displa Keyb	norizo ions, ng the ayed. oard	ntal to i.e., pi e mous Stand equiva	oolbai revio se ari ard I lents	r prov us blo row or cons c for to	ides an ock, nex n each i on the l oolbar f	other (t blocl icon w Horizo functio	way to k, etc., ill cause ntal Toe ns are	acces with t e a de olbar a listed	s com the clio scripti are sho on the	monly us ck of the ion label own belc e next pa	sed mouse. to be w. ge.	
	5	<u>[]</u> [▶	•	Z	Ē	1	T	í 😰		X	í 🚯	[📙	[Χ ₆]	X		[<u>4</u>]} [1	Х
Save	Rollback	Select	Insert Record	Remove Record	Previous Record	Next Record	Previous Block	Next Block	Enter Query	Execute Query	Cancel Query	View/Send Message	Print	SCT Banner Xtender Solutions	BSX Add Document	New Broadcast Msg.		Online Help	Exit

B. Keyboard Shortcuts

Function	Keystroke
Accept / Commit / Save	Alt 1 1 st latter of desired many
Concel	
Class Block	
Clear Form (Pallback	
Clear Hore	Smil+ F/
Clear Item	
	Snift+ F4
Commit / Accept / Save	F10
Count Query Hits (CQH)	Shift+ F2
Delete Record	Shift+ F6
Display (Direct access to forms, menus, etc.)	F5
Display Error	Shift+ F1
Duplicate Item	F3
Duplicate Record	F4
Edit	Ctrl+ e
Enter Query	F7
Execute Query	F8
Exit	Ctrl+ q
Exit with Value	Shift+ F3
Help	F1
Insert / Create Record	F6
List of Values	F9
Next Block	Ctrl+ PageDown
Next Item	Tab
Next Primary Key	Shift+ F3
Next Record	Shift+ Down Arrow
Next Set of Records	Ctrl+ Shift+ >
Previous Block	Ctrl + PageUp
Previous Item	Shift+ Tab <u>or</u> Shift+ Ctrl+ Tab
Previous Record	Shift+ Up Arrow
Print Active Window	Shift+ F8
Save / Accept / Commit	F10
Scroll Down	PageDown
Scroll Up	PageUp
Select	SpaceBar or Enter
Select Button (Exit with Value)	Shift+ F3
Show Kevs	Ctrl+ F1
Note: (*) Not all functions available at all times	
New with Version 7	

Title Bar	The form name, version of Banner and the database instance: (ePROD) is listed.
Key Block	A block is a section of a form or window that contains related data. The key block is the first block on most forms (validation forms and other list forms usually do not have a key block). It will contain the key information and will dictate what is displayed on the rest of the form. To navigate between blocks you would use the "next block" and "previous block" functions.
Tabbed Navigation	Selected forms have improved internal window navigation. Clicking on a Tab is equivalent to selecting next block or previous block.
Auto Hint	The Auto Hint provides information regarding the field where the cursor is located. It may indicate the use of the field, what can be done next, or how to move to the next logical location. In addition, the Auto Hint is also used to display any error or processing messages.

C. Options Box

• **Right click** anywhere outside of a field to display the options box. This options list contains form-specific navigation as well as common functions such as *Rollback*, *Save*, *and Print*.

ID:	Generate
Current Identification Alternate Identification	Bollback Save Exit Print Add to Personal Menu
Person	Current Identification
Last Name:	Telephone
Prefix:	Emergency Contact Appointments and Contacts [SOAAPP [*]]
Preferred First Name: Full Legal Name:	System Data Summary [GUASYST] Common Matching [GOAMTCH]

• **Options Dropdown** list is an alternate navigation tool. Click Options on the menu bar to display a list containing form-specific navigation options.

🏙 Oracle	Develor <mark>er Forms Runtime - Web</mark>
<u>F</u> ile <u>E</u> dit	Options Block Item Record Query Tools Window Help
E 🔊 Rate Identif ID:	Current Identification Image: Contact Alternate Identification Image: Contact Address Image: Contact Telephone Image: Contact Biographical Image: Contact
Current	Address Appointments and Contacts [SOAAPPT] Address System Data Summary [GUASYST] Common Matching [GOAMTCH]

D. Validation Fields

- Click on the down arrow next to the field window and a predefined list or table of valid values will be displayed
- Scroll or search through the list to find the correct highlighted value
- Click OK or
- Double click on the value and it is returned to the form



- **Red Field Description** indicates that Double clicking within the field will display the list of possible valid values or
- Type in a value that is known to be valid

A	ternate I	dentification Address	Telephone	Biographic						
N	Name Type:									
-		an Validation (CT (NTVD) - SSSSSSS								
	vane ryp									
	Find%									
	Code	Desc	Activity Date							
	AKA	Alias/Nickname	26-OCT-1998							
	AUDT	Auditor	30-SEP-2002	1.1						
	AUXL	Auxiliary Employee	30-SEP-2002							
	CONT	Outside Contractor	27-JUN-2002							
::	CSRT	Corporate Sort	26-OCT-1998							
	ECLB	E-Club	05-AUG-2002							
	FRND	Friend of Eastern	26-JUN-2003							
	GENB	Generic Departmental Account	23-OCT-2002							
	GRAD	Graduation	26-OCT-1998							
		Eind	<u>OK</u> Cancel							

III. Search Procedures

A. ID and Name Search

Use any form with ID and Name in the Key Block.

Examples:	APAIDEN
	FOAIDEN
	PPAIDEN
	SPAIDEN

	🙀 Identification Form S	PAIDEN 7.0.0.1 (ePPRD)	000000000000000000000000000000000000000	
IC	ID:	Name field] (
	Current Identification	Alternate Identification	Address	Telephone

Search by Full ID:

- Enter ID
- Press enter
- If the person exists in the system, the name will be displayed

Search by Full Name:

- With the ID field blank, **tab** to the name field, enter the full name [last name, first name] and press enter.
- If one match is found, the name and ID are returned to the form.
- If more than one match is found, the "ID and Name Extended Search" window appears. Details are on the next page.

Search by Partial Name:

- With the ID field blank, **tab** to the name field, enter a partial name with the wildcard %. The format is last, first, middle with a comma between each part of the name. Spaces are optional
- Press enter
- Examples:
 - smith,J% returns all ID's with last names "smith", first names starting with
 "j"
 - \circ mag%, p% returns all ID's with last name starting with "mag", first name starting with "P"
 - %, Barbara returns all ID's with first name "Barbara"

B. ID and Name Extended Search

- If more than one match is found, the "ID and Name Extended Search" window is displayed.
- Click on the down arrow to display the list
- Scroll to find the name
- Click on the name
- Name and ID are returned to the form

÷	ID and Name Extended Searc	h SPAIDEN 7.0.0.1 (ePPF	RD) 000000000000000000000000000000000000	000000000000000000000000000000000000000	$\approx \times$	Number of
	Search Results:			6		results
	Person Search Detail	: 📔 🛛 Non-P	erson Search Detail:			
-		Reduce Search I	By			
	O Person	ONON-Person	🖲 Both			
	Enter search criteria then p	ress Execute Query or se	lect button to reduce	search.		
	City:		SSN/SIN/TIN:			
	State or Province:		Birth Date:			
	ZIP or Postal Code:		Gender:			
	Name Type:					
					_	
	Press Enter Query or select	button to clear search.			6	

If you need to further reduce your search in the Extended Search window:

- Select the radio button for "Person", "Non-person" or "Both"
- Enter your search criteria in the fields of the "Reduce Search By" window (one or all fields may be used)
- Click the Search Button (magnifying glass icon). Use the drop down list to view reduced search results.

Once the correct ID is in the Key Block:

- Click the Next Block button on the toolbar or
- Click in a field in the detail block or
- Ctrl-Page Down to view information

To cancel the Extended Search:

• Click on the cancel button. 🔀

C. Alternate Option List

🧑 Ident	tification	Form	SPAIDEN	7.0.0.1	(ePPRD)	100000	 	-000-	200	-000)
ID:										I

Click on the down arrow to display the Option List:



If there is more than one search option for the form being accessed, the Option List window will be displayed. Click the desired selection. Person Search allows search by ID, Last Name, First Name, and Middle Name. Alternate ID Search gives an additional search field for the Social Security Number (SSN). Please note: SSN may not be on file for every individual. Non-Person Search is used for companies/vendors/etc.

When the search form displays:

- Enter search criteria, % is a wildcard
- Click the "Execute Query" button on the toolbar
- Double click the desired ID and the name and ID will be returned to the calling form

Once the correct ID is in the Key Block:

- Click the Next Block button on the toolbar or
- Click in a field in the detail block or
- Ctrl-Page Down to view information

ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Type
		Case Sensitive Que	ry?			
		® No OYes				

IV. Changing Your Banner Password

From the General Menu Form, click on Change Banner Password



The Oracle Password Change Form (GUAPSWD) will be displayed:

🙀 Oracle Password Change Form GUAPSWD 7.0 (ePPRD) 000000000000000 🗹 🛪 🗙

Oracle User ID:	GILLETTEE	
Oracle Password:		
Database:		
New Oracle Password: Verify Password:		

- Tab to the <u>Oracle Password</u> field, enter your current Banner password.
- Tab to the <u>New Oracle Password</u> field, enter your new password.
- Tab to the <u>Verify Password</u> field, re-enter your new password.
- Click Save
- Message displays: Password has been changed, reconnecting.
- Click OK to return to the Banner Main Menu

🙀 Oracle Pass	vord Change Form GUAPSWD	7.0 (ePPRD)	्≝ त्र ×े
ſ	orms 2000000000000000000	× 2000000000000000000000000000000000000	
Orac			
Orac	Password has h	een changed, reconnecting,	
Data		oon ondrigod, roconnoodingr	
New		OK	
Verit			