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

The following logon box will be displayed:

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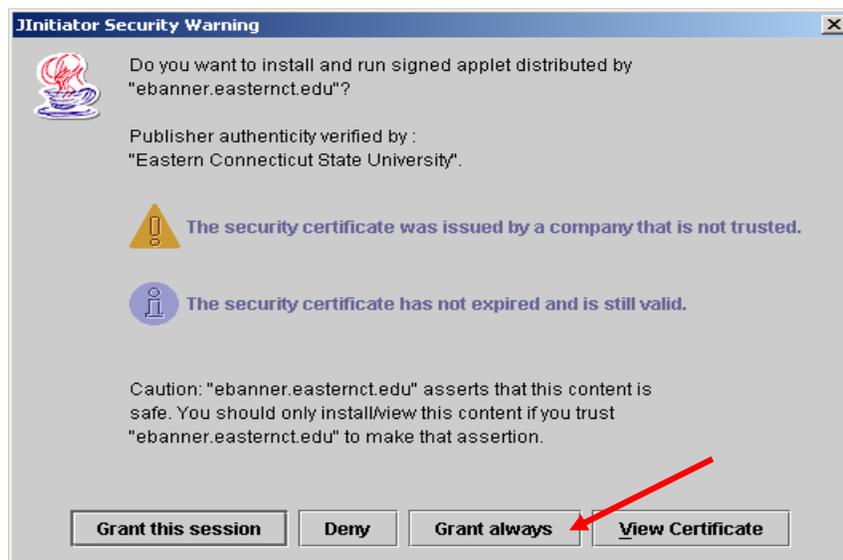
You will notice that there are actually two browser windows associated with this software. The Oracle – Web window remains maximized and is the active window. The other remains minimized. Do not close it or your Banner session will end.


B. Main or General Menu

System messages are displayed here.
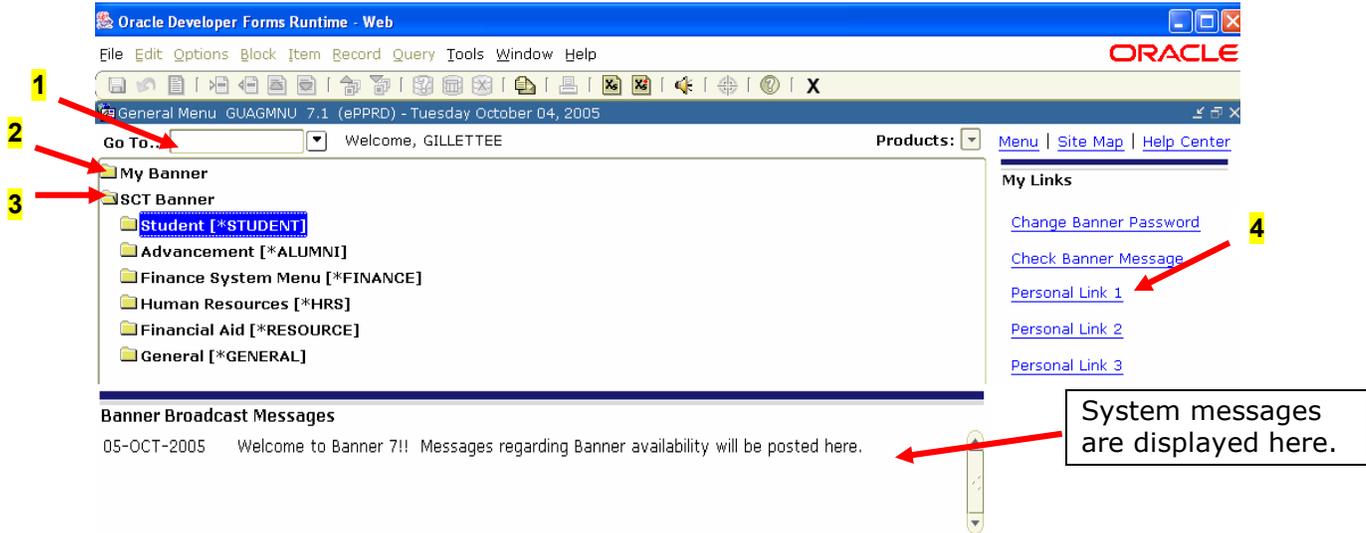
- **Go To…(direct access to a form) 1** - If you know the name of the form that you wish to access, type the seven character form name in the Go To… field and press the enter key. The desired object will open, assuming the proper authorization has been granted.

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

Options Box: Right click outside any field on a form to display.

2
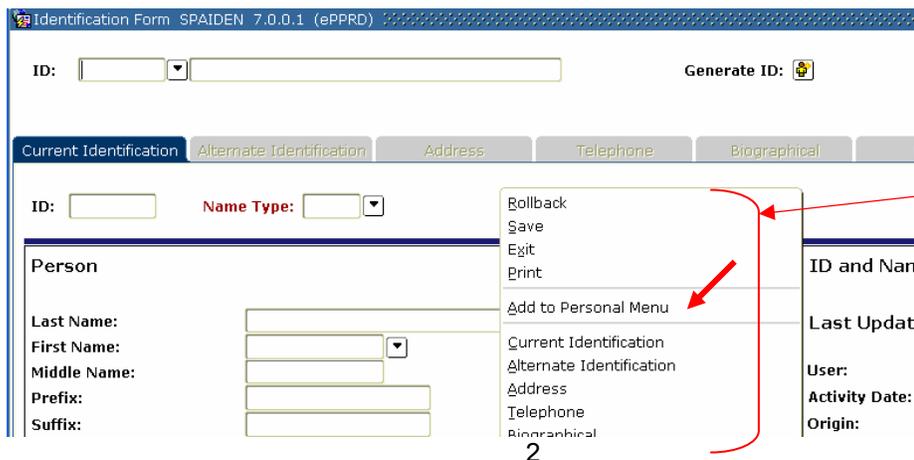
- **SCT Banner** <mark>3</mark> – double click on SCT Banner to view the sub-folders available for a specific module i.e., Student, Alumni, Finance, HRS, etc. Double click on the folders to view various forms that pertain to each module.

C. Setting Personal Preferences
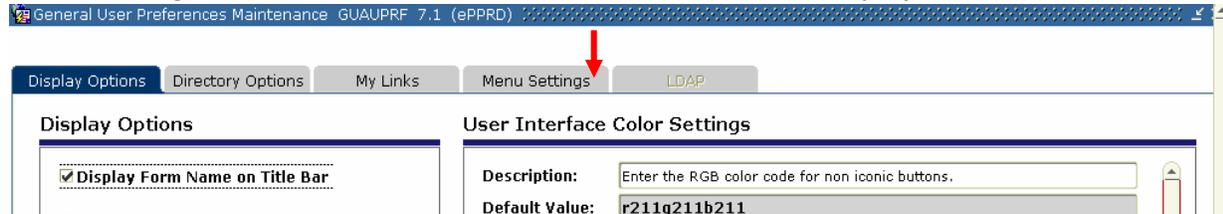
If you prefer to have 'My Banner' expanded (showing list of customized forms)
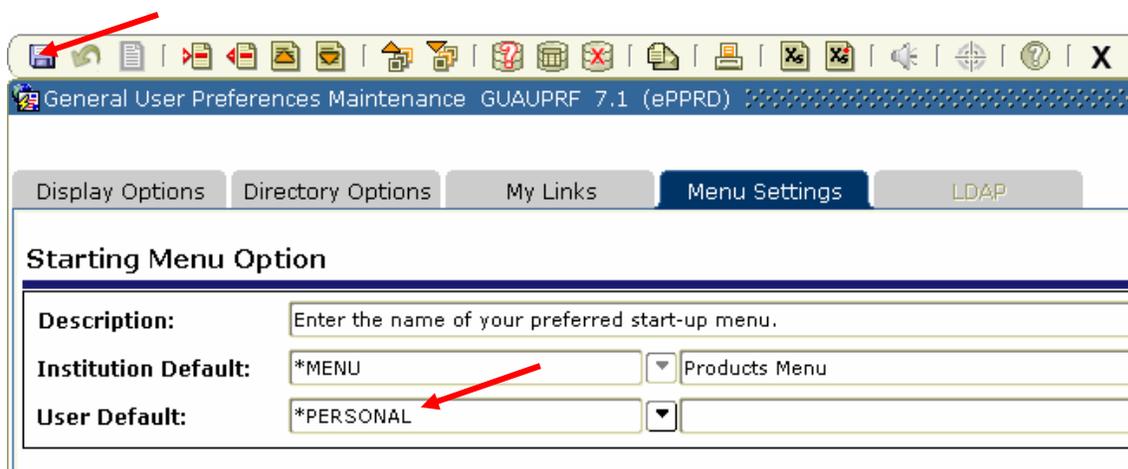- Click File on the Main menu bar
- Click Preferences
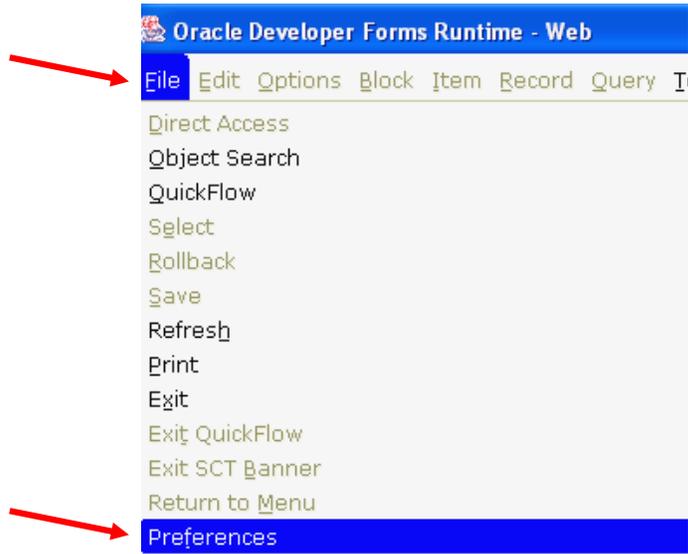
The following General User Preferences Maintenance form is displayed:

- Click on Menu Settings tab
- Type ***PERSONAL** in the User Default field
- Press enter
- Click on SAVE

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)

The link descriptions followed by the URL or Banner Object (form) of each description are listed in pairs.

Up to 6 personal links can be customized.

- 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
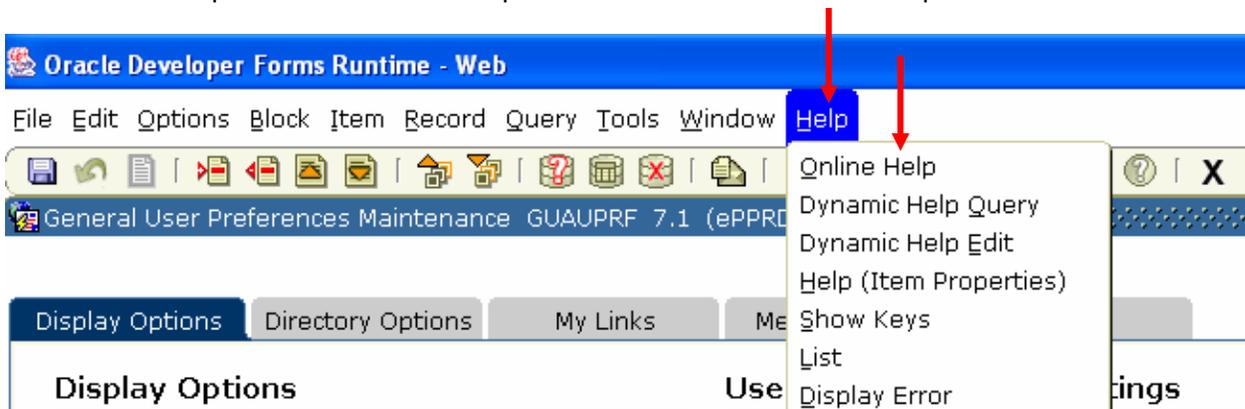
F. Exiting Banner

- Click the "**X**" icon on the end of the horizontal toolbar
- or click "File" on the menu bar ➜ 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.

A. Parts of a Form

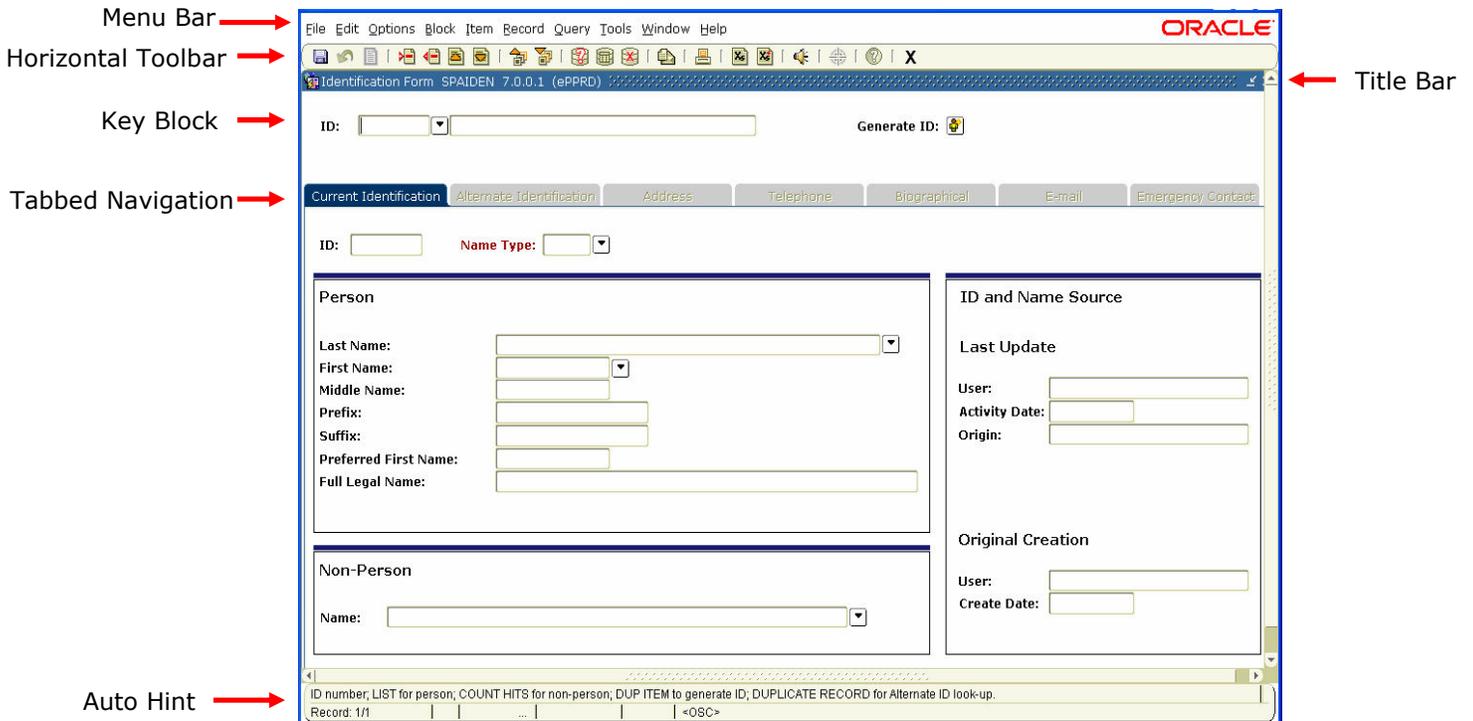|	
Menu Bar	The menu bar, located at the top of every form, contains pull-down menus that offer an array of functions, most of which can also be done with an equivalent keystroke or a click of the mouse.
Horizontal Toolbar	The horizontal toolbar provides another way to access commonly used functions, i.e., previous block, next block, etc., with the click of the mouse. Placing the mouse arrow on each icon will cause a description label to be displayed. Standard Icons on the Horizontal Toolbar are shown below. Keyboard equivalents for toolbar functions are listed on the next page.

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
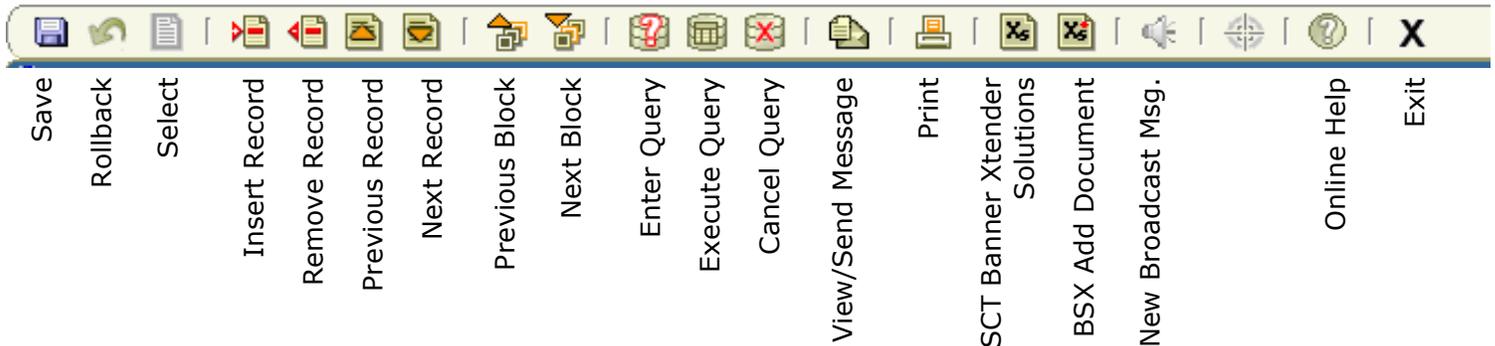
B. Keyboard Shortcuts

Function   Keystroke
Accept / Commit / Save F10
Banner Menu (Application Menu)...................... Alt + 1st letter of desired menu
Cancel .... Esc
Clear Block... Shift+ F5
Clear Form / Rollback .... Shift+ F7
Clear Item .... Ctrl+ u
Clear Record .... Shift+ F4
Commit / Accept / Save................................ F10
Count Query Hits (CQH)................................ Shift+ F2
Delete Record... Shift+ F6
<mark>Display (Direct access to forms, menus, etc.) .... F5</mark>
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 or 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 Keys .... Ctrl+ F1
Note: (*) Not all functions available at all times.
<mark>New with Version 7</mark>

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*.
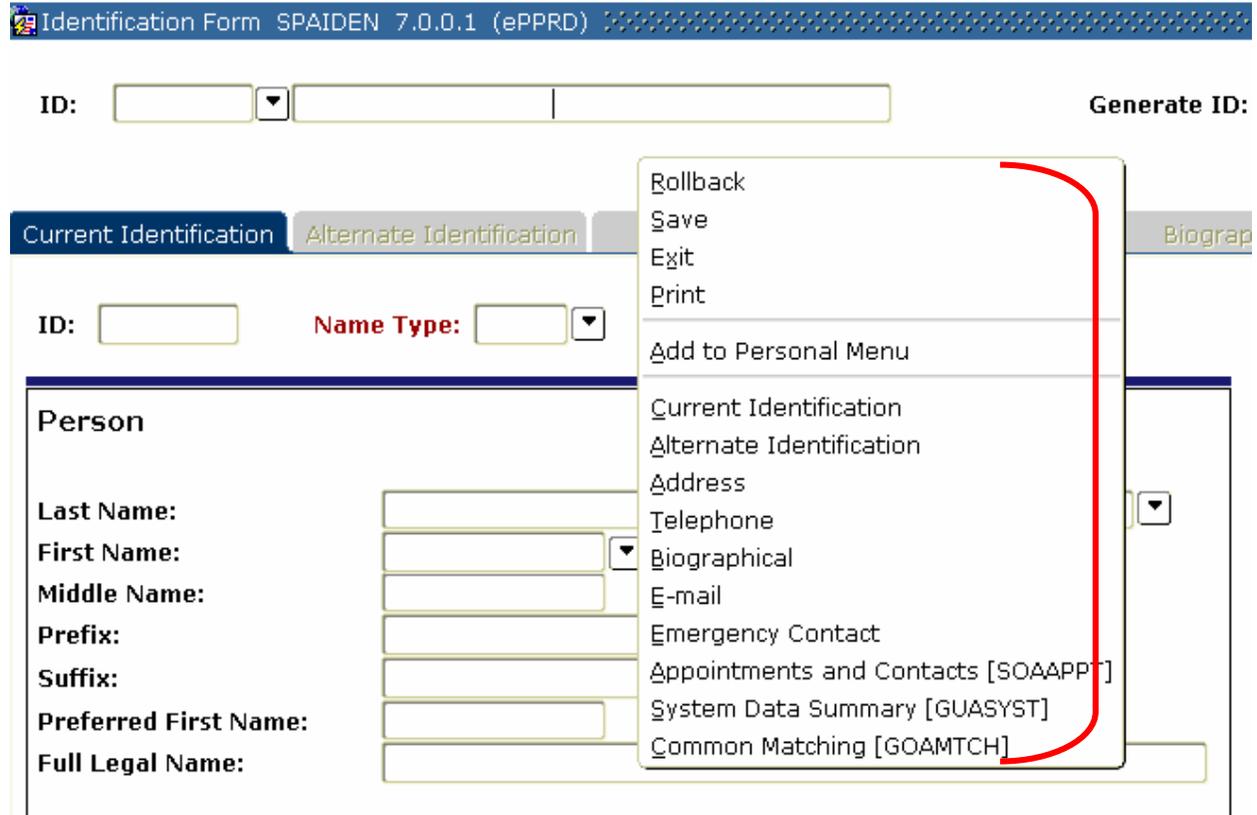

- **Options Dropdown** list is an alternate navigation tool. Click Options on the menu bar to display a list containing form-specific navigation options.
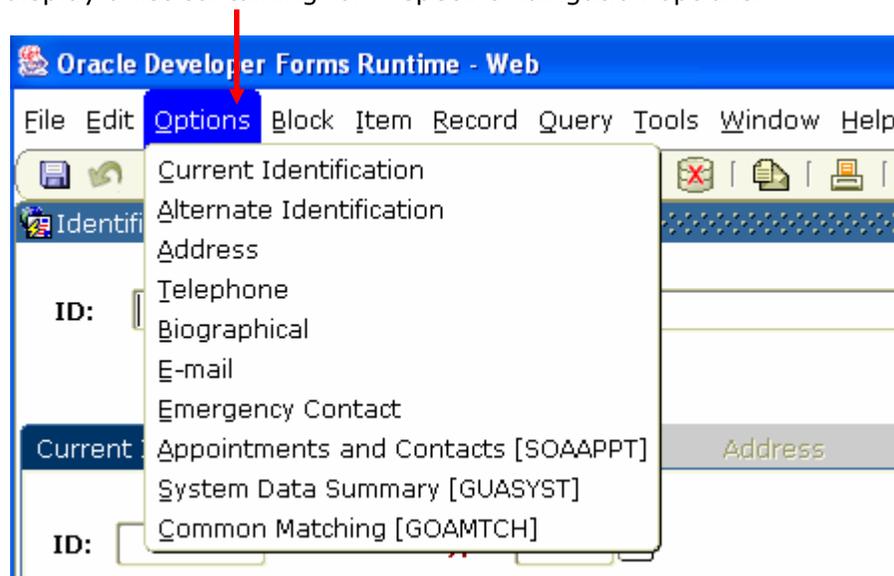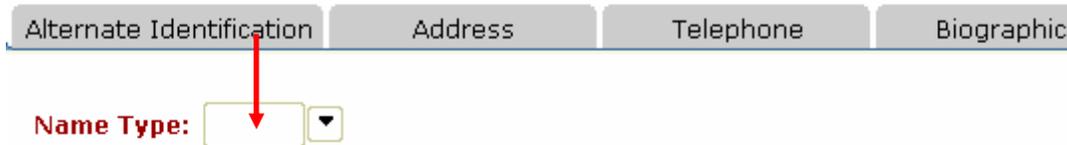
D. Validation Fields

- 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
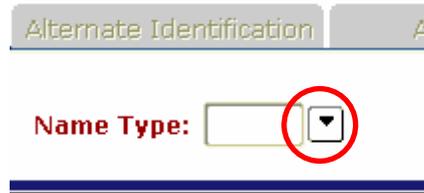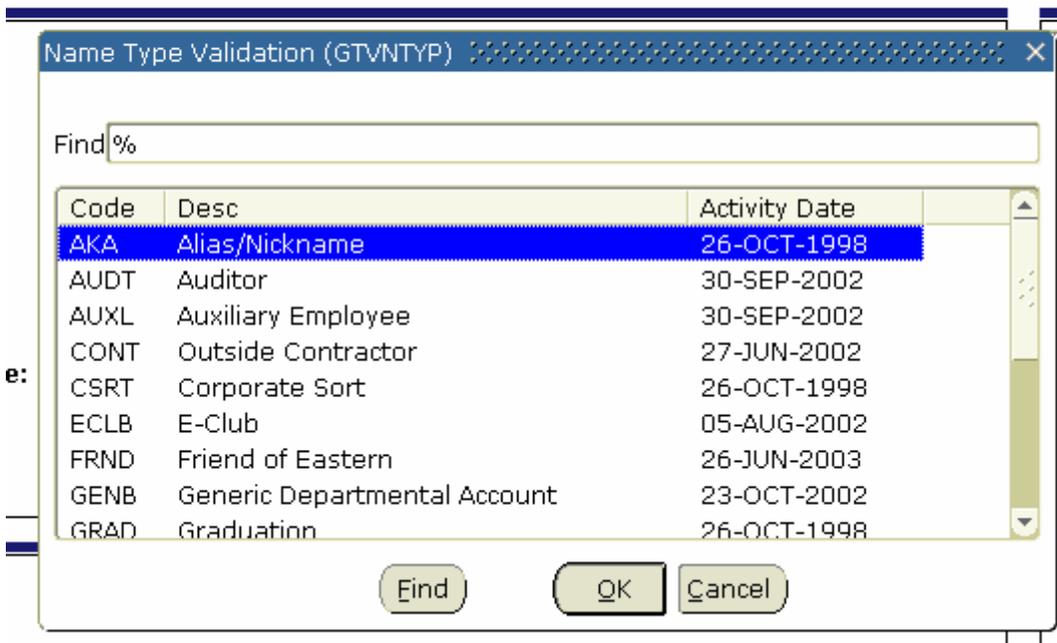

- **Red Field Description** indicates that Double clicking within the field will display the list of possible valid values or
- Type in a value that is known to be valid

III. Search Procedures

A.   ID and Name Search

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

Examples: APAIDEN
FOAIDEN
PPAIDEN
SPAIDEN

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"
  - 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

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:
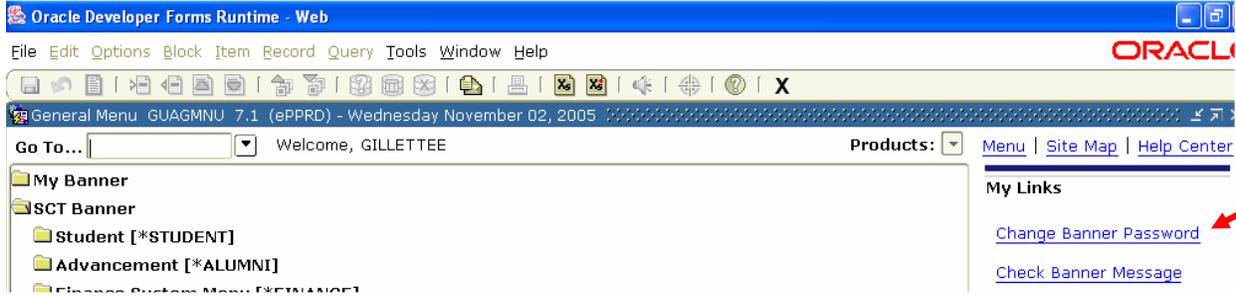- Click on the cancel button. ☒

C.   Alternate Option List

Click on the down arrow to display the Option List:

Option List

Person Search

Non-Person Search

Alternate ID Search

Cancel

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

Person Search SOAIDEN 7.0 (ePPRD)

ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Type

Case Sensitive Query?

● No   ○ Yes

IV. Changing Your Banner Password

From the General Menu Form, click on Change Banner Password

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

- 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