

Youngstown State University

This guide is designed to be used in conjunction with attendance in training classes provided by the Banner Training Team.

Internet Native Banner 7 Navigation

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Goals



The goal of this guide is to provide the knowledge and needed information to accurately navigate within Banner and understand all necessary concepts, features, and terms.

Intended Audience

This guide is designed to assist all those functional areas that will be using Internet Native Banner (INB) for day-to-day operations.

Pre-requisites

In order to attend this class, participants should have the following pre-requisites:

-  Basic keyboard and mouse skills
-  Internet familiarity

What is Banner?

Banner is a web-based software application developed specifically for higher education institutions by a company called SunGard SCT. Banner provides an online environment that will allow YSU to perform computing functions in a highly efficient manner as all data will now be totally integrated and shared among different departments across the University.

Banner comes in two distinct options: Internet Native Banner (INB) and Self-Service. Employees in the functional areas will be using the Internet Native Banner option.

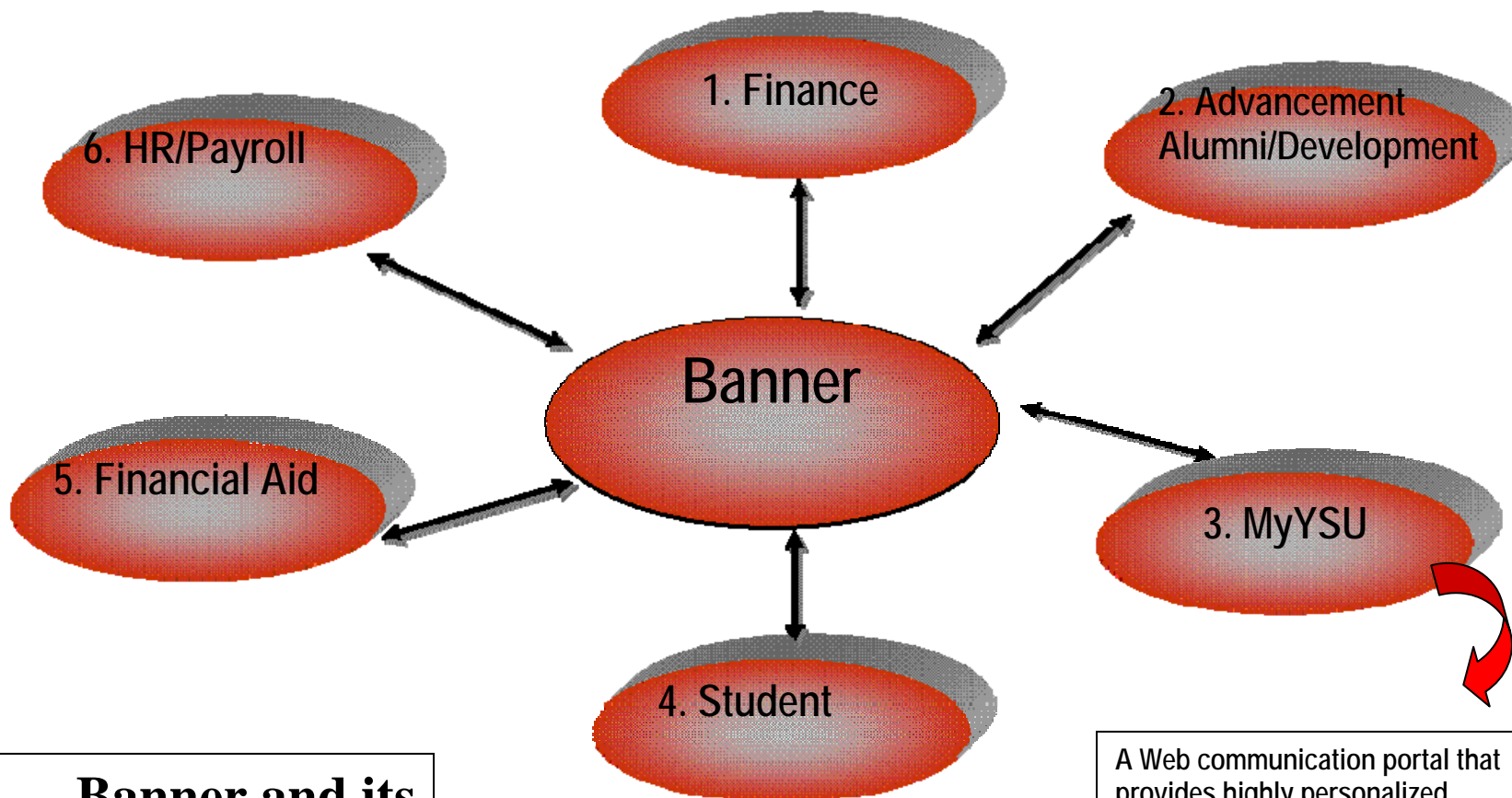
System

A system is a term used in Banner to describe an overall area of administration within Banner. For example, Finance and Human Resources are both systems within Banner.

Module

A module is an area of administration within a system. For example, Accounts Payable is a module under the Finance System.





Banner and its connection to operations at YSU

A Web communication portal that provides highly personalized information, Web services and community interaction to every campus constituent—from faculty and students to administrators and alumni.



Logging into Banner

Banner is a web-based program. To use it, open an Internet Browser (browsers include Microsoft Internet Explorer, Netscape Navigator, etc.) and log into Banner.

- 1 **Open** Internet Explorer
- 2 **Type:** <http://banner.yzu.edu> <press enter>

Internet Native Banner is available in two modes: training and production. Training INB provides the ability to perform the processes in this manual without harming real University data and will be used during the training class and for individual practice. **Production will be used to accomplish actual University activities.**

- 1 **Locate** Internet Native Banner
- 2 **Click** Training Database [TRNG]

Youngstown
STATE UNIVERSITY

YSU

SCT BANNER APPLICATION SERVER

WARNING: To protect the system from unauthorized use and to ensure that the system is functioning properly, activities on this system are monitored and recorded and subject to audit. Use of this system is expressed consent to such monitoring and recording. Any unauthorized access or use of this Automated Information System is prohibited and could be subject to criminal and civil penalties.

[Banner 6 instances](#) [Converter Tool](#) [Documentation](#)

Banner 7 instances

Banner 7 requires 1024x768 screen size

Internet Native Banner (INB)	Self-Service Banner (SSB)
PROD	PROD
YTRN	YTRN
TRNG	TRNG
PPRD	PPRD
TEST	TEST
CONV	CONV
PPRZ	PPRZ
TRN7	TRN7

Quick Tip

Banner has a 3-hour timeout limit established. However, if you are not using the product, please exit properly before the timeout limit has been reached.

Quick Tip

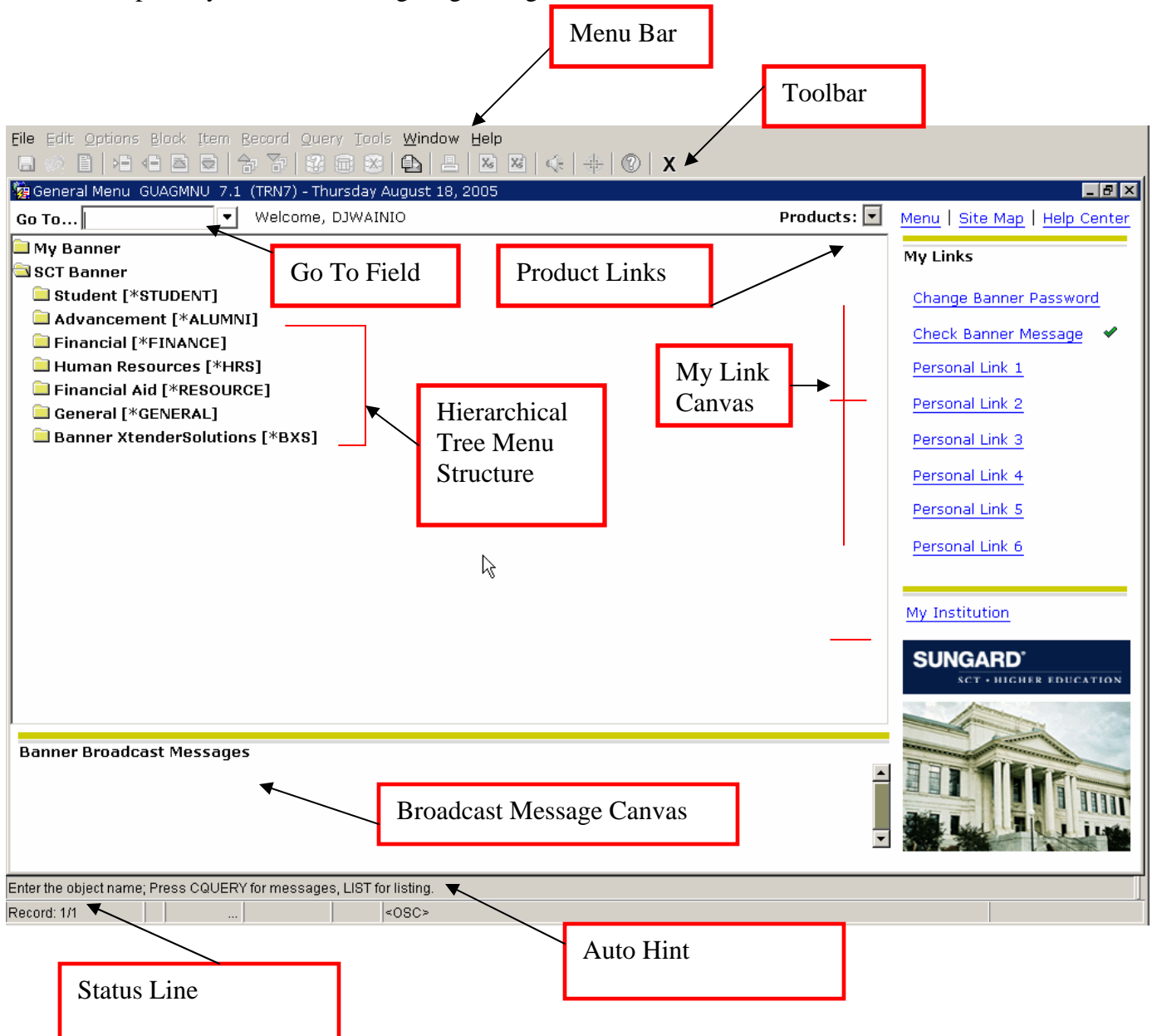
The first time you login to INB, a program called Oracle Jinitator will download. Click all necessary buttons if prompted for downloads and installs. This is a one-time download.

Interface Overview and Menus

Menus provide a method for navigation throughout Banner.

Main Menu

The main menu provides an overview of the menus, forms, jobs, and QuickFlows in Banner. The main menu is the primary method for navigating through Banner.



Quick Tip

Double-click on the folder to expand any of these areas in the main menu; continue double-clicking on the remaining folders until the form icon appears. Double-clicking on the form icon retrieves the form. Double-clicking on an open folder closes the folder.

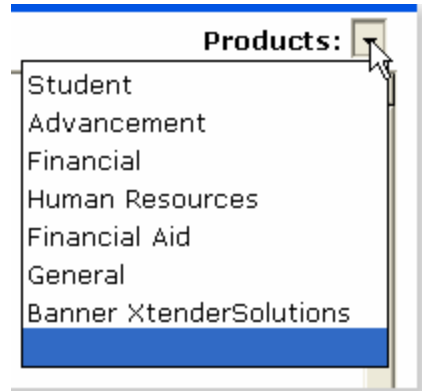


Product Links

Provide for access to SCT Banner modules directly.

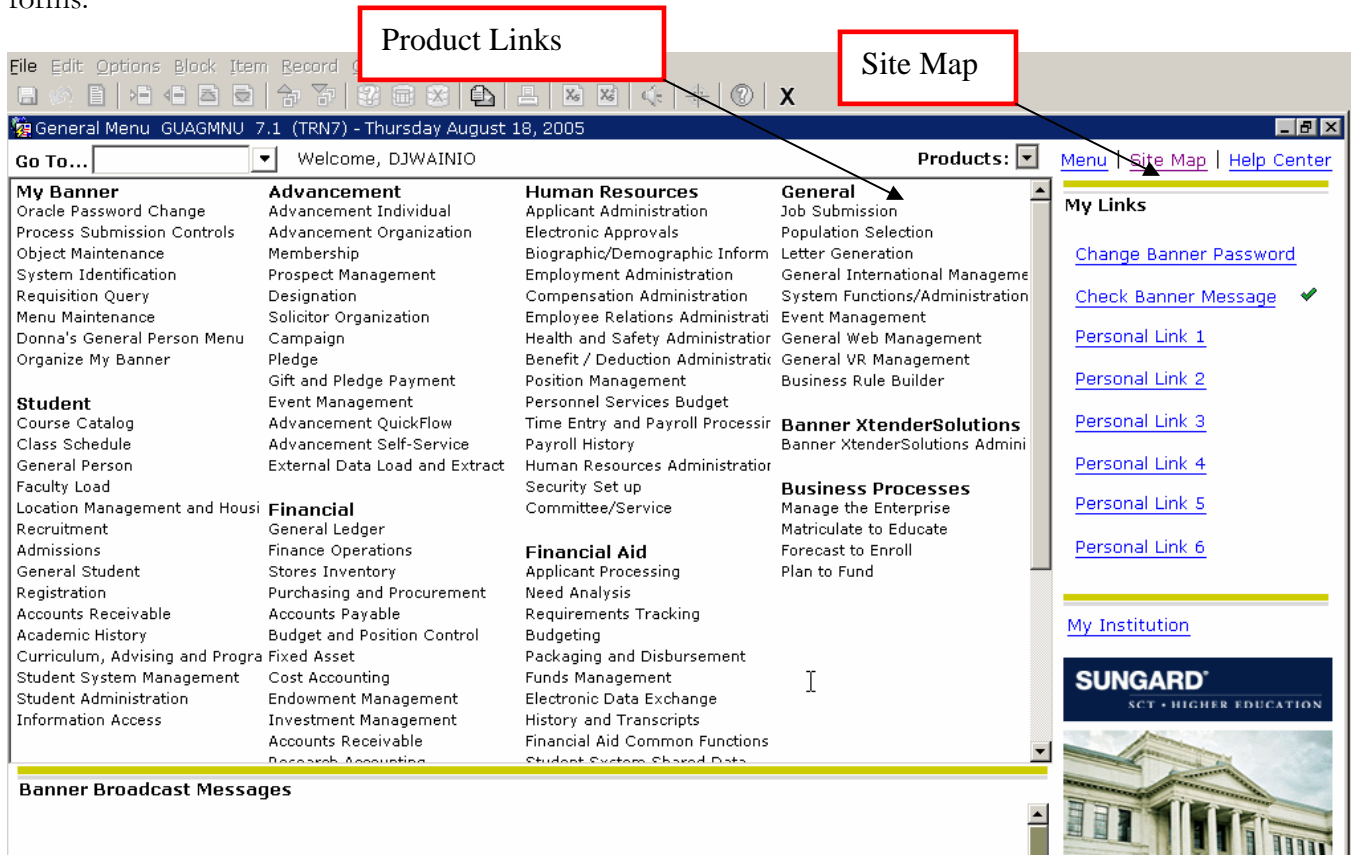


Click and hold the dropdown arrow on the Products link to select the system.



Site Map

The site map lists top level menus and one level below. No fields are listed, just links to various menus and forms.



Menu Bar

This familiar Windows menu bar is located at the top of every form and contains pull-down menu choices. If a menu item is dimmed, it is disabled and cannot be accessed.

File Edit Options Block Item Record Query Tools Window Help



Forms

A form is an online document where information is entered and retrieved. Forms visually organize information so it is easier to enter and read. A form is similar to a paper document except information is entered once and is used by other Banner forms. Forms are comprised of fields. Data is entered into fields.

Types of Forms

Forms can be categorized as being either set-up or day-to-day. Set-up forms need to be completed during implementation and before day-to-day forms are used. Validation, rule, and control forms are Set-up forms used to tailor INB to YSU's requirements. Revisions can be made to these forms any time--provided a security level permits. Day-to-day forms would be inquiry, application, query, maintenance, and wizard. Internet Native Banner uses eight types of forms:

Main menu (GUAGMNU): used to navigate through INB. It provides an overview of the menus, forms, jobs, and QuickFlows available in Banner.

Set-Up Forms

Validation forms: used to define the values that can be entered in specific fields on application forms. These values are used throughout INB. When you look up a code or select the List function, these values appear in the List of Values (LOV) window.

Rule forms: used to define the calculations and parameters that impact processing on other forms, reports, and jobs.

Control forms: used to define the processing rules for application and validation forms at the system level.

Day-to-Day Forms

Application forms: used to enter, update, and query information. This is the most common type of form.

Query forms: used to look up existing information, often returning information to the calling form. These forms are accessed from another form—they cannot be accessed directly from the main menu, with direct access, or with object search.

Inquiry forms: used to look up existing information, often returning information to the calling form. These forms can be accessed from the main menu, from another form, with direct access, or with object search.

Wizard forms: used to give step-by-step instructions for completing an application. There are very few of these form types.

Form Naming Conventions

Each form in Banner has a seven (7) character name – this name is an acronym which identifies the type of information the form contains, the University business process it is related to, and much more. See the chart at the end of the document.

Position 1:
Identifies the primary system owning the form.

Position 2:
Identifies the business process (module) owning the form.

Position 3:
Identifies the form type.

Position 4-7:
Uniquely identifies the form.

S

P

A

IDEN

1

2

3

4-7

- Advancement (A)
- Finance (F)
- General (G)
- Position Control (N)
- HR/Payroll/ Personnel (P)
- Financial Aid (R)
- Student (S)

- General Person (P)
- Application (A)
- Budget (B)
- COBRA (C)
- Benefit/Deductions (D)
- Employee (E)
- Electronic Approvals (R)
- "Overall" to a business process (O)
- General to a business process (G)

- Application (A)
- Inquiry (I)
- Validation (V)
- Maintenance (M)

- Examples:
- Identification (IDEN)
 - Position (POSN)
 - Encumbrance (ENCB)
 - Employee (EMPL)
 - Job information (JOBS)
 - Requisition (REQN)
 - Check (CHEK)



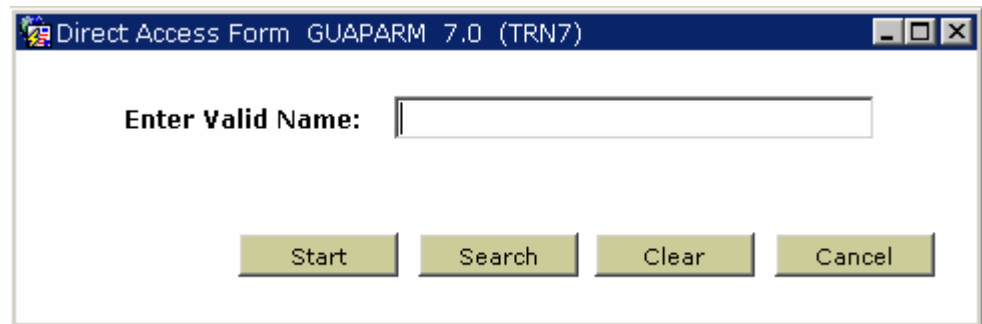
	Example: <i>FPAREQN</i>	Example: <i>SAAADMS</i>	Example: <i>PHICHEK</i>
Position 1: Identifies the primary system owning the form	F = Finance	S = Student	P = HR/Payroll/Personnel
Position 2: Identifies the business process (module) owning the form	P = Purchasing	A = Admissions	H = History
Position 3: Identifies the type of form	A = Application	A = Application	I = Inquiry
Position 4-7: Uniquely identifies the form	REQN = Requisition	ADMS = Admissions	CHEK = Check

Accessing Forms

There are multiple methods for accessing forms in Banner.

Direct Access

Use the Go field (or direct access) to open a menu or form by typing the seven-character name into the field and pressing the Enter key. The direct access command can also be found from the File menu or from within a form.



Use the keyboard shortcut of F5 to access the Direct Access menu form within any Banner form.

Last 10 Forms

The File menu provides access to the Last 10 forms previously accessed during the current Banner session. Once the session has been exited, the forms are no longer available.

Object Search

Go To...




The object search opens the form GUIOBS to enable searching of a form. When the correct seven-character name code for the form is unknown, use the object search feature. Refer to the section on wildcard characters for additional information.

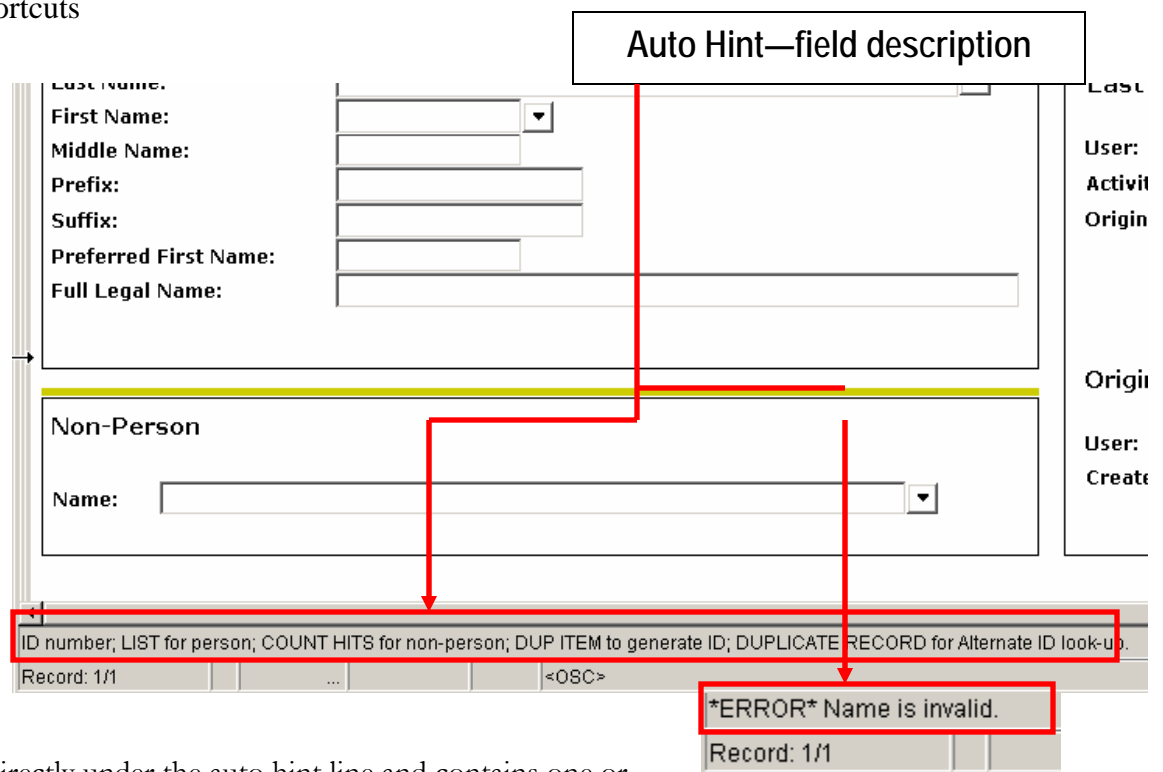
Special Areas of a Form

There are special areas that are very helpful to refer to on every Banner form.

Auto Hint Line

The auto hint line appears at the very bottom of the Banner window and can display various messages depending on what forms and features are being accessed in Banner. The auto hint line provides messages and hints about how to proceed while working in Banner. Examples of various messages are:

-  Brief field descriptions
-  Error and processing messages
-  Keyboard shortcuts



The screenshot shows a Banner form with several input fields. A box labeled "Auto Hint—field description" is positioned above the form. A yellow horizontal bar highlights the auto hint line. A red box highlights the status bar at the bottom, which contains the message "*ERROR* Name is invalid." and "Record: 1/1".

Status Bar

The status bar is directly under the auto hint line and contains 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 windows, 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).

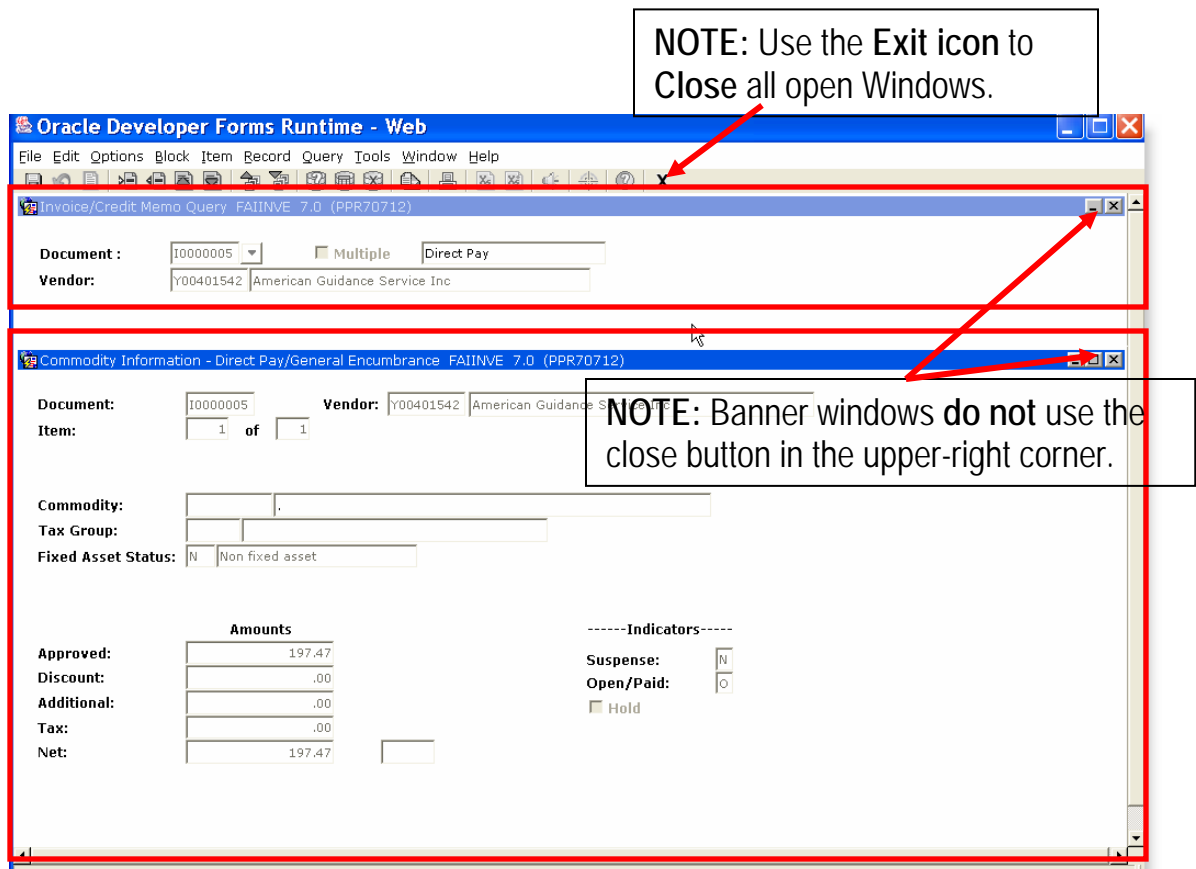
Enter-Query –indicates the form you are using is in query mode and can be used for searching.

Navigating in Forms

There is no *one way* of using every form. Each form has its own purpose and its own method of usage. However, there are some navigational features that most forms do share.

Windows

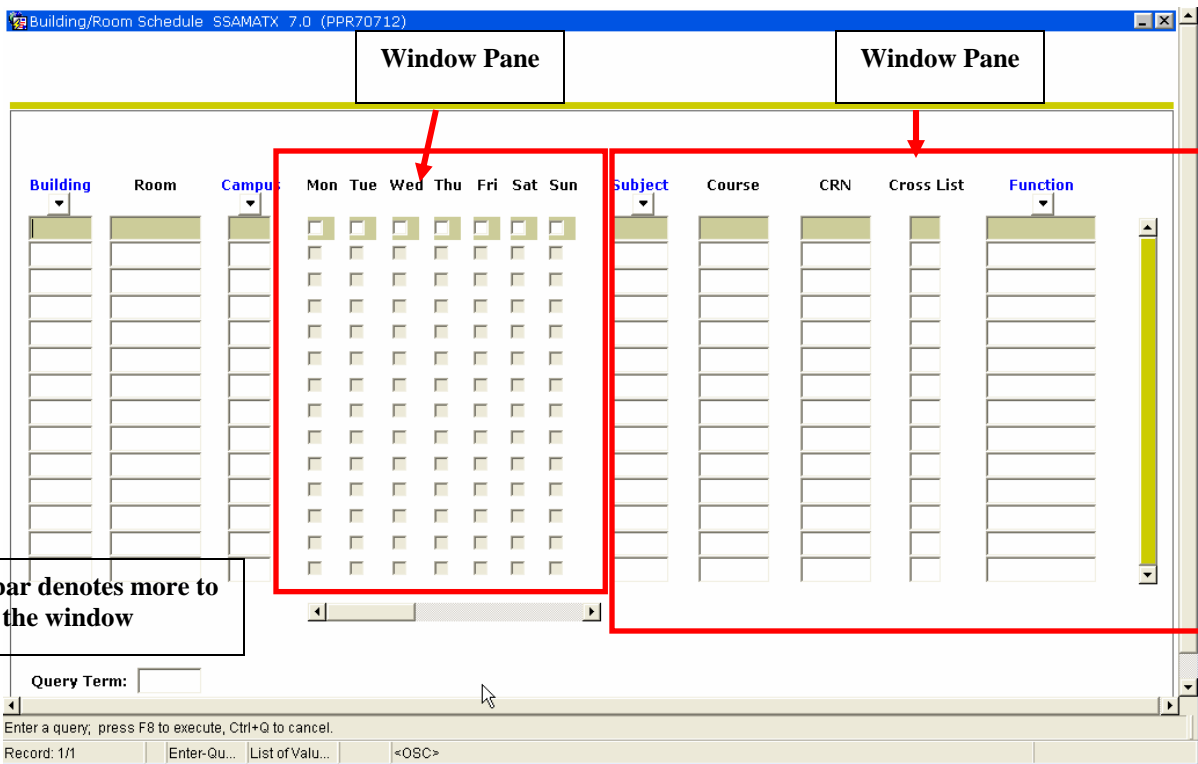
A window is a framed portion of a form. Just as some paper forms have multiple pages, some Banner forms have multiple windows. The first window in a form is called the main window and is identified by the form name. All other windows in the form have their own unique names. More than one window can be open at the same time. The only limits are determined by the amount of memory installed on your computer. Not all windows are the same size, so you might see parts of more than one window at the same time. You can move a window by dragging its title bar to a new location. (You cannot move the title bar above the screen.)



Window Panes

A window pane is an area within a window that has more fields than can appear at one time. Use the horizontal and/or vertical scroll bars at the bottom and/or right of a window pane to see the remaining fields in that pane. It may not be possible to view all fields at one time.

If a window does not display a scroll bar, then all available fields can currently be viewed.



Tabs

Many, but not all, forms in Banner 7.0 have been combined through the use of tabs across the top of the form.

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 box.

Key Blocks

The first block on most forms contains key information and is the starting point of each form. This key block determines what is entered or displayed on the rest of the form. All information on the form refers to the **key block**.

The key block:

determines what is entered or displayed on the rest of the form. All information on the form refers to the key block;

has at least one field and sometimes more;

remains on the form as subsequent blocks appear.

When the cursor is in the key block, enterable fields in the key block are enabled. When you leave the key block, enterable fields in the key block are disabled.

Data Blocks

A data block is a section of a form or tabbed window that contains information related to the key block—or chunks of information grouped together. If a form or window contains more than one block, each block (except the key block) may be enclosed in a solid line box or on a separate tab.

Fields

Fields are areas on a form where data can be entered, queried, changed, and displayed. The following terms describe a field:

- Enabled.** You can put the cursor in the field. Information in the field appears in black text.
- Disabled.** You cannot put the cursor in the field. Information (if it exists) appears in gray text.
- Enterable.** You can enter information in the field. The field is usually enabled. In certain situations, however, it may be disabled.
- Display only.** You cannot enter information in the field.

List of Values (LOV):

Many fields only accept codes from a defined List of Values (LOV). Most codes and associated descriptions in a LOV are defined on a validation form. A drop-down arrow often appears next to the LOVs. When a LOV is called from a specific field, only information that is relevant to the current form is displayed in the LOV.

With this feature you can:

- Enter a complete code or description;
- Look up a code or description based on a partial entry;
- Display the entire LOV and select a code.

Records

Records are sets of related fields. If a block has multiple records, the records often appear in rows and columns. A horizontal scroll bar appears under the columns if all columns do not fit into the window at once. A vertical scroll bar appears on the right side of the rows if all rows do not fit into the window at once. When a row is selected, the entire record is highlighted to identify it as the current record.

These areas can be accessed via the toolbars or through the Options menu.

The screenshot shows the Banner software interface with several annotations:

- KEY BLOCK:** A red box highlights the 'Encumbrance:' dropdown menu at the top left.
- FIELD:** A red box highlights the 'Description:' and 'Date Established:' input fields.
- COLUMN:** A red box highlights the 'Transaction Amount' column in the table below.
- RECORDS/ROW:** A red box highlights a single row in the table.
- DATA BLOCKS:** A vertical label on the left side of the interface, with red arrows pointing to the 'Encumbrance:' dropdown and the table area.

The interface includes a menu bar (File, Edit, Options, Block, Item, Record, Query, Tools, Window, Help) and a toolbar with various icons. The table below has columns for Transaction Date, Type, Document Code, Action, Transaction Amount, and Remaining Balance.

Toolbars and Buttons

Toolbars are a set of buttons or icons that offer quick access to commonly used Banner functions. A tool tip appears as the mouse is moved over the icon.

The screenshot shows the Banner software interface with two annotations:

- MENU:** A red box highlights the menu bar (File, Edit, Options, Block, Item, Record, Query, Tools, Window, Help).
- TOOLBAR:** A red box highlights the toolbar containing various icons for navigation and actions.

The interface also shows the 'Encumbrance:' dropdown, 'Description:' and 'Date Established:' fields, and the 'Item:', 'Sequence:', 'Fiscal Year:', and 'Commit Indicator:' fields at the bottom.

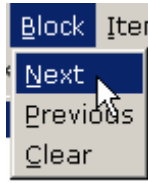


Moving around a form

Sometimes moving to other blocks will move you to another area on the same form, or sometimes it will open a totally new window displaying another block of information.

To move to Next Block:

Click Next Block from toolbar  OR
Choose Next from Block menu



To move to Previous Block:

Click Previous Block from toolbar  OR
Choose Previous from Block menu

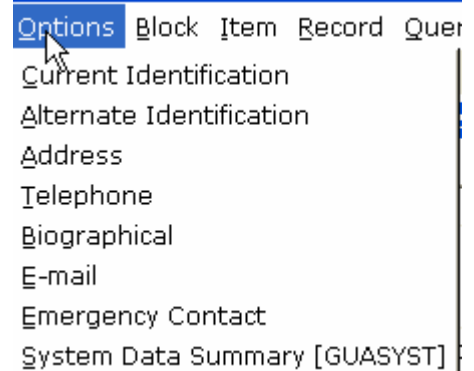


Quick Tip

Use keyboard shortcut of CTRL PgDn or CTRL PgUp to activate Next Block/Previous Block command.

To move to Next/Previous Tab:

Click desired Tab OR
Choose Tab from Options menu



Quick Tip

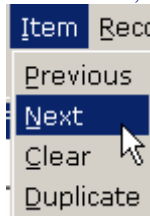
Use keyboard shortcut of CTRL Tab or CTRL Shift Tab to activate Next Tab/Previous Tab command or press F2, List Tab Pages, to display the tabs

Quick Tip

The close button on the form does not work the same as in other Windows environments- - reactivate the original form by clicking on it. The other form(s) will hide in the background. When the original form is closed, all other forms will also close.

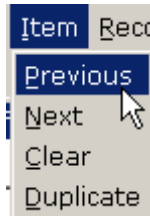
To move from field to field:

Choose Next from Item menu



To move back from field to field:

Choose Previous from Item menu



Quick Tip

Use keyboard shortcut of Tab or SHIFT Tab to activate Next Item/Previous Item command. Fields are sometimes referred to as Items.


Once the cursor reaches the end of the available fields in a block, it will typically start again at the first field and continue to cycle through all fields in that block.

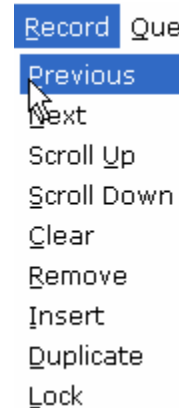
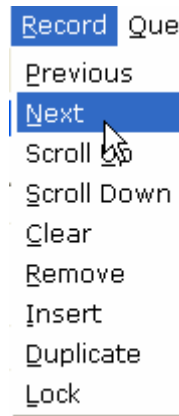
Quick Tip

To access fields that are in another block, you must move to the next/previous block first.


Some forms are designed to display a list of records, such as a query form. These forms may not have blocks.

To move from record to record:

Click Next Record from toolbar  OR
Choose Next from Record menu



To move back from record to record:

Click Previous Record from toolbar  OR
Choose Previous from Record menu



Use keyboard shortcuts of the cursor arrow down and cursor arrow up.

Options Menu

The Options menu on the Main Menu bar contains navigation options that are frequently used. Navigation options vary from form to form and depend on the cursor location. Some options take you to other blocks and windows within the current form.

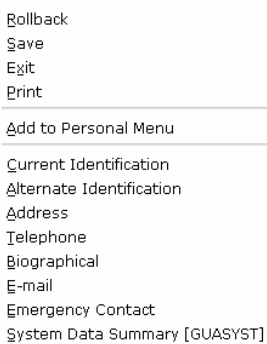
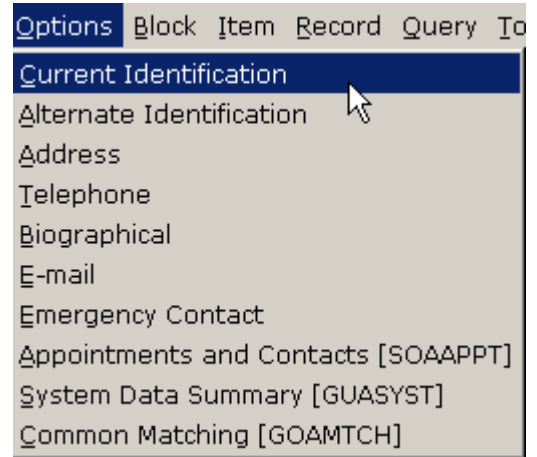
Other options take you outside the current form to related forms. Choices selected from the Options menu will display additional areas that will allow access to further form data.



The form names in parenthesis indicate that another related form will be accessed.



Forms which are currently open may not be accessed again through the Options menu.



Additionally, right-clicking the form will activate the quick menu which provides access to related forms.



Press F2, List Tab Pages, to display the tabs

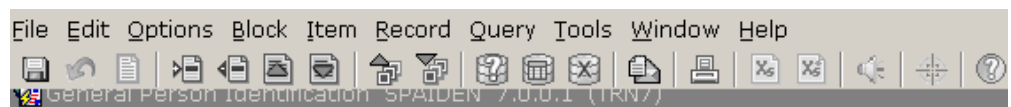
Rollback

This feature provides an option to rollback to a previous area. That area could be to a key block or beginning field depending upon the type of form opened at the time of the rollback.



Rollback is NOT an undelete feature or an undo feature!

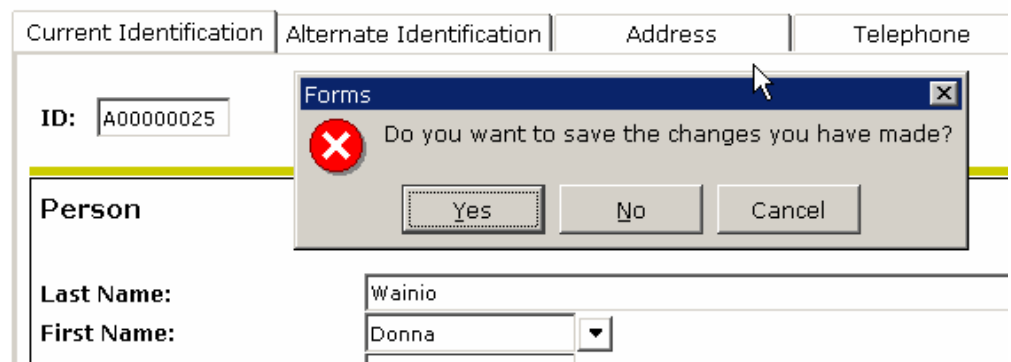
If changes have not been saved recently and the “rollback” is executed to the beginning of an area, Banner will usually prompt to save what has been done before rolling back.



ID: A00000025 Wainio, Donna J.

Click Yes to save any changes to the record before rolling back to the previous area.

Click No to discard any changes to the record before rolling back to the previous area.



Rollback works as follows:

Application and Inquiry forms:

Clears all information (except key information) and returns you to the first enterable field in the key block. If you enter changes and do not save them before trying to rollback, you are prompted to save.

Validation forms:

Returns you to the first enterable field on the form.

Query forms:

Returns you to the first enterable field on the calling form.



Using Wildcards

The use of wildcards is essential to performing quality searches. Wildcards are characters that are used as placeholders for unknown letters.

Wildcard Characters

Use the wildcards, “%” and “_” in defining the search criteria—without the quotes. The “%” character represents any number of unspecified characters. The “_” (underscore) character represents a single, unspecified character.

Examples:	
To get these results:	Enter this criteria:
All entries that contain “ma” in the name	%ma%
All entries that begin with “ma”	ma%
All entries that begin with “ma” but are only three characters	ma_
All entries that have “ma” as the last two characters	%ma
All entries that have “m” as the second character	_m%
All entries that begin with “s” but have only five characters	s_ _ _ _



The dropdown arrow is a search button.

Using Object Search

The Object Search window enables searching for items by the Banner seven (7)-character name code, description, type, or by any combination of the three.

Name:

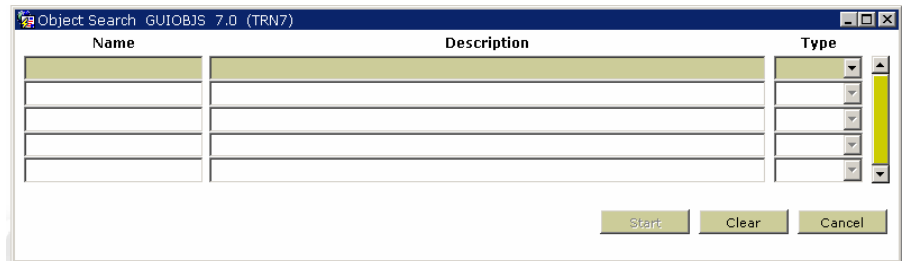
The multi-character code that identifies all objects (i.e., FTMVEND, PPAIDEN, SPAPERS, etc.).

Description:

Words used to further describe the objects.

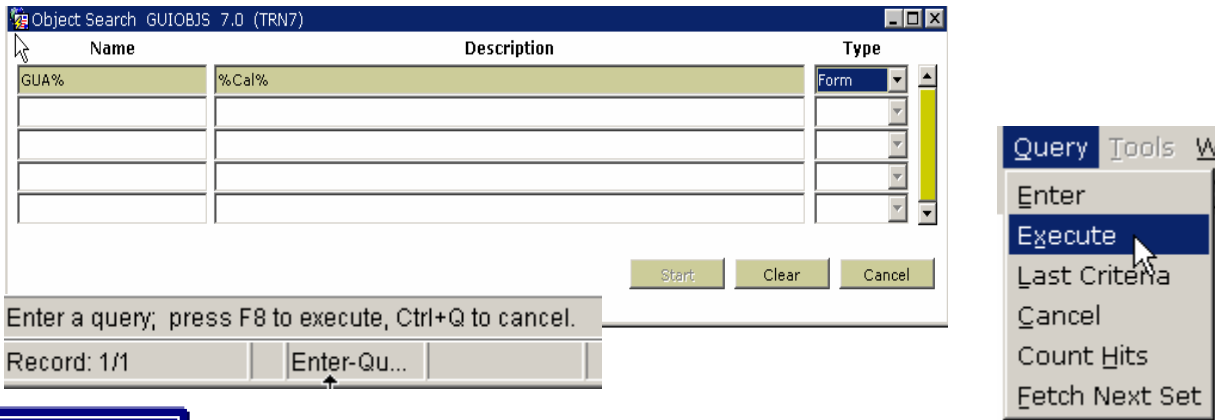
Type:

The category of objects (i.e., form, job, etc.).



To use Object Search to search for forms:

1. Type in the 7-character name code, description and/or choose Form from the Type field
2. Press F8 or Choose Execute from Query menu



The Start button in the (GUIOBJS) form is used to open a form once it is located. The F8 or Execute Query command must be used to activate the search. If the Start button or Enter key is pressed, it may cause an error of no records to be retrieved.

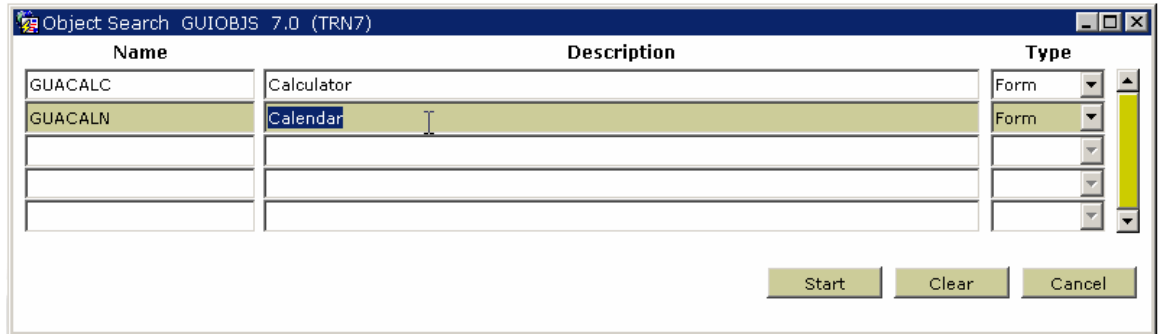


Some of the searches are case sensitive!

3. Locate the desired item
4. Double-click item

or

Click item
Click Start



To cancel a search once the Object Search (GUIOBJS) form has been opened, click Cancel twice or press Ctrl Q twice.



It is also possible to search with wildcard characters directly from the Go To field.

Searching in a Form


Some fields in a form enable searching for the correct data to input. Form fields that provide a search capability will have a search icon next to that field.



Depending on the form, in addition to using the magnifying glass icon to search, you can type in part of the data into a field, along with a wildcard symbol, then press ENTER. A separate window will appear where you can choose from a list of found records or continue to search further using more criteria.

To search on a form field:

1. Open the form
2. Place cursor in the field to search
3. Click Search icon
4. Choose the correct Option, if necessary
5. Type in the known data (along with Wildcard, if necessary) in the correct field
6. Press F8 to execute the query
7. Double-click on correct record to place that data in the original form
8. Continue filling out the original (calling) form

Vendor: 

Corporation: **Search**

Last Name:

Entity Name/ID Search FTIIDEN 7.0 (TRN7)

Vendors Grant Personnel
 Terminated Vendors Proposal Personnel

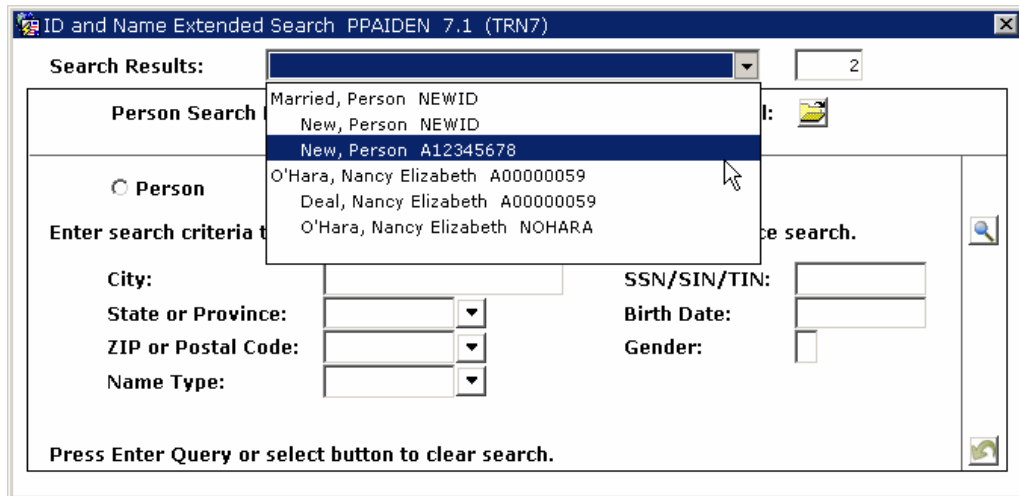
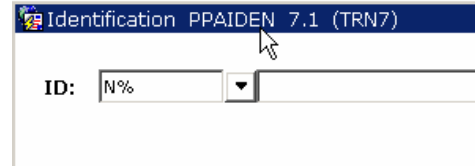
ID Number	Last Name	First
A00000074	ABC Corp	
300000020	ARCO Manufacturing Co., Inc.	
ASK000001	ASK Corp	
V9	AT&T	



Advanced/Extended Search

Some forms provide for extended or advanced options.


1. Open the form
2. Place cursor in the field to search
3. Type in the known data (along with Wildcard, if necessary) in the correct field
4. Press Enter key
5. Choose the correct record from the Search Results drop-down list



Use more criteria to limit search results by selecting the desired option buttons or typing in any additional criteria in the provided textboxes and clicking the Search icon.

Customizing Banner

Banner can be customized to make it more convenient and efficient for each individual user. There are multiple ways of customizing Banner, but the three most popular methods are detailed below.

-  Creating Personal Menus/Using My Banner
-  Creating QuickFlows
-  Changing Personal Preferences

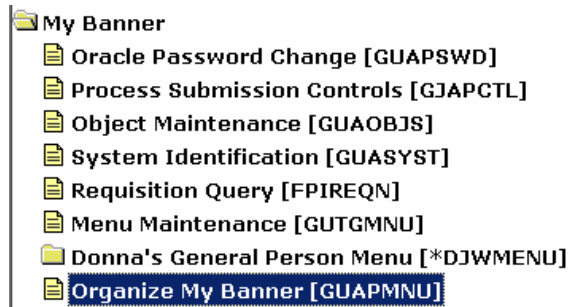
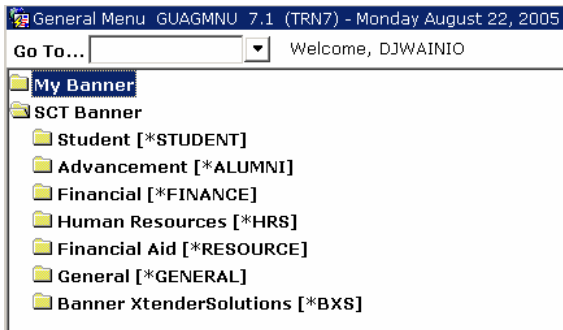
Personal (My Banner) Menu

My Banner is an area that is used to create your own personal menu of forms that is accessed on a daily basis. This is similar to favorites or bookmarks in your web browser.

My Banner is displayed as the first menu area on the Main Menu. Initially My Banner is empty. My Banner is customized to individual selections.

To customize the My Banner menu:

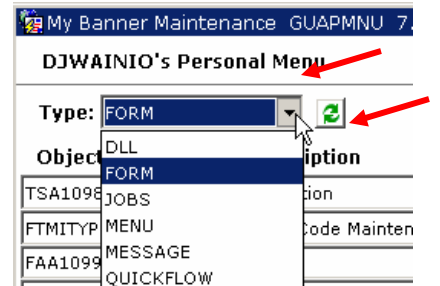
1. Click on My Banner
2. Double-click Empty or Organize My Banner. [GUAPMNU]



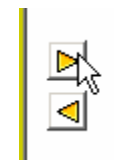
Quick Tip

Once My Banner has been customized, the menu will display Organize My Banner

3. Choose the type of object to add to the personal menu from the drop-down list at the top, left corner of the screen
4. Click the Sort Object List icon to list the objects alphabetically so that it is easier to find the desired item
5. Scroll through the left window pane of items, until the object to be added to the personal menu list in the right window pane
6. Select (highlight) the item(s) to add



Object	Description
TSA1098	1098-T Tax Information
FTMITYP	1099 Income Type Code Maintenance
FAA1099	1099 Reporting



7. Click the Insert Selection icon to add the item to the personal menu
8. Click Save icon
9. Click Exit icon
10. Exit Banner
11. Re-login to see changes to My Banner menu





To use the search features in this form, place the cursor in the left window pane, verify that no items are selected and press F7. Type desired search information (i.e., SP% to locate forms that begin with SP) about the item in area of the blank pane and press F8.

DJWAINIO's Personal Menu	
Type:	FORM
Object	Description
TSA1098	1098-T Tax Information
FTMITYP	1099 Income Type Code Maintenance
FAA1099	1099 Reporting
FOA1099	1099-MISC Magnetic Tape Transmitter D.
PXA1099	1099-R
PTV1099	1099-R Distribution Code Validation
RNAOV01	2000-2001 Applicant Override
RNRGL01	2000-2001 INAS Global Policy Options RL
RNIMS01	2000-2001 Miscellaneous Results Inquiry
RNANA01	2000-2001 Need Analysis
RNAVR01	2000-2001 Need Analysis Document Veri
RNAPR01	2000-2001 Need Analysis Processing
RNASL01	2000-2001 Student Loan Data

Object	Description
GUAPSWD	Oracle Password Change
GJAPCTL	Process Submission Controls
GUAOBSJ	Object Maintenance
GUASYST	System Identification
FPIREQN	Requisition Query
GUTGMNU	Menu Maintenance
*DJWMENU	Donna's General Person Menu

Removing Forms from My Banner

After adding forms to the personal menu, it may be necessary to remove certain forms from My Banner.

To remove items from My Banner:

1. Click on My Banner
2. Double-click Organize My Banner [GUAPMNU]
3. Select the items to remove from the right window pane

Object	Description
GUAPSWD	Oracle Password Change
TSA1098	1098-T Tax Information
GJAPCTL	Process Submission Controls

4. Choose the Remove Selection icon to remove items from the My Banner menu
5. Click Save icon
6. Click Exit icon
7. Exit Banner
8. Re-login to see changes to My Banner menu



The My Banner Maintenance and Copy Form (GUTPMNU) enables copying of a My Banner menu to or from another user.

QuickFlows

A QuickFlow is a series of forms that have been linked together into a set that will flow quickly from one to the next. Banner comes with some built-in QuickFlows that can be used and/or each individual user can create their own personal QuickFlows.

To use a QuickFlow:

1. Choose QuickFlow from File menu
OR
Type GUAQFLW from the Go field
2. Click Search icon to search for the QuickFlow
OR
Type the QuickFlow code in QuickFlow text box
3. Scroll through the list of QuickFlows in the top window pane
4. Click on desired QuickFlow
5. The list of forms included in the selected QuickFlow appears in the bottom window pane
6. Double-click the QuickFlow from the top pane

QuickFlow Form GUAQFLW 7.0 (TRN7)

QuickFlow:
Description:

Start Clear Cancel

QuickFlow Query GUQQUK 7.0 (TRN7)

QuickFlow Code	QuickFlow Description
ADM	Admissions List
ADMR	Define Applicant Codes
AHR	Define Grade Processing Rules
APP	Application Procedure
BUDG	Budget Inquiry

Form Name	Description
SPAIDEN	General Person Identification
SPAPERS	General Person
SOATEST	Test Score Information
SOAHSCH	High School Information
SAAADMS	Admissions Application

The code and description of the selected QuickFlow appears in the QuickFlow form

7. Click Start

QuickFlow Form GUAQFLW 7.0 (TRN7)

QuickFlow: ADM
Description: Admissions List

Start Clear Cancel

8. Use and exit each form in the QuickFlow series
9. At the last form in the QuickFlow, the QuickFlow Form (GUAQFLW) reappears
10. Exit the QuickFlow form



Quick Tip

A QuickFlow can be stopped at anytime by choosing Exit QuickFlow from the File menu.








Quick Tip

Skip any form that is presented in a QuickFlow without entering any data by closing the form as normal. If a message appears prompting to quit the form, click Yes. Once that form closes, the next form in the QuickFlow series appears.

Creating your own QuickFlows

Banner provides built-in QuickFlows, and the functionality of creating customized QuickFlows. QuickFlows can be created with any combination of forms except the following:

-  Main Menu (GUAGMNU)
-  Welcome to Banner Form (GUAINTT)
-  QuickFlow Form (GUAQFLW)
-  Security Maintenance Form (GSASECR)
-  Any query form (Q is the third character of the form name)

To create a QuickFlow:

1. Determine the code and purpose of the QuickFlow
2. Identify all forms that must be accessed for the tasks to perform

For Example:

Code: JOB

Purpose: Add jobs to Job Submission

Forms needed: GJAJOBS, GJAPDEF, GJAPVAL, GJAPDEF

3. Open QuickFlow Code Validation Form (GTVQUIK)

4. Click Insert Record icon from toolbar



5. Type new QuickFlow code and description in the GTVQUIK form fields

Code	Description	Activity Date
ADM	Admissions List	10-SEP-1990
ADMR	Define Applicant Codes	03-JUL-1997
AHR	Define Grade Processing Rules	03-JUL-1997
APP	Application Procedure	04-MAR-1991
BUDG	Budget Inquiry	14-MAY-1997
COBR	COBRA Procedure	06-MAR-1991

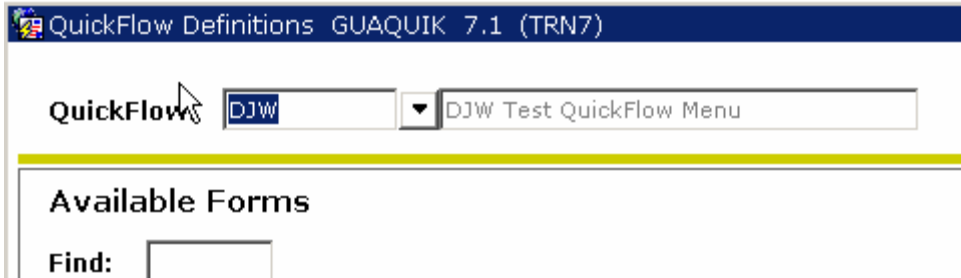
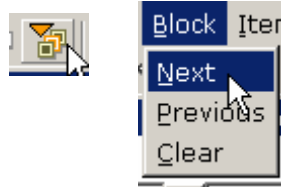
6. Click Save icon from toolbar
7. Exit the form



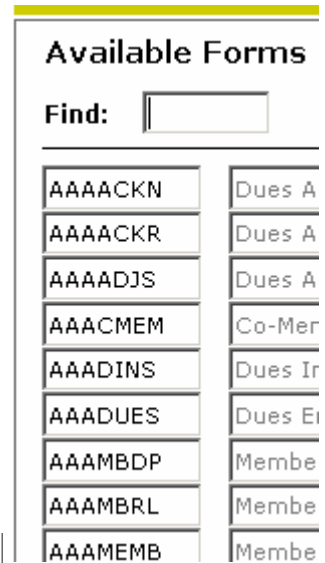
Quick Tip

A QuickFlow code can contain up-to-four characters.

8. Open QuickFlow Definitions Form (GUAQUIK)
9. Type QuickFlow code (determined previously) in the QuickFlow text box at top of form
10. Move to next block



11. All existing Banner forms appear in far left pane
12. Scroll, if necessary, to locate desired forms to add to QuickFlow



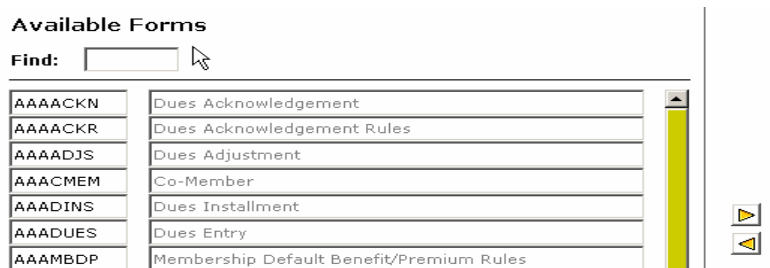
Quick Tip

QuickFlow codes must be typed into the first column in the right side pane (or copy and pasted). Double-clicking on code (or dragging) will not work.

Quick Tip

The QuickFlow forms will open in the order you list them on the GUAQUIK form.

13. Type code name of the forms in the order they should appear in the QuickFlow in the right side pane



Quick Tip

To change the order of an already created QuickFlow, you must remove the forms and re-add them in the desired order.

14. Continue adding forms in the desired order
15. Click Save icon
16. Exit the form



Editing QuickFlows

There may be times when additional forms will need to be added to or removed from a QuickFlow.

To add additional forms to QuickFlow:

1. Open QuickFlow Definitions Form (GUAQUIK)
 2. Type QuickFlow code to edit
- OR
- Search for correct QuickFlow by clicking on Search icon
3. Move to next block
 4. Locate form(s) to add from left pane
 5. Type code names in the order to appear in the right pane
- OR
- Copy and paste codes
6. Click Save icon
 7. Exit the form

To remove forms from a QuickFlow:

1. Open QuickFlow Definitions Form (GUAQUIK)
 2. Type QuickFlow code to edit
- OR
- Search for correct QuickFlow by clicking on Search icon
3. Move to next block
 4. Click form in the QuickFlow remove
 5. Click Delete Record icon
 6. Click Save icon
 7. Exit the form



Once a QuickFlow is deleted – it is permanently deleted.

Deleting QuickFlows

Removing unused QuickFlows can help to eliminate confusion.

To delete a QuickFlow:

1. Access QuickFlow Code Validation Form (GTVQUIK)
2. Select the QuickFlow to delete
3. Click Delete Record icon
4. If a Confirm Delete Alert box appears, click Yes
5. The QuickFlow should no longer appear in the list of QuickFlows
6. Click Save icon
7. Exit the form







Personal Preferences

By default, Banner does not display the seven-character form names next to the descriptions in the Main Menu tree. This feature is helpful when beginning to use Banner.

To display Form names:

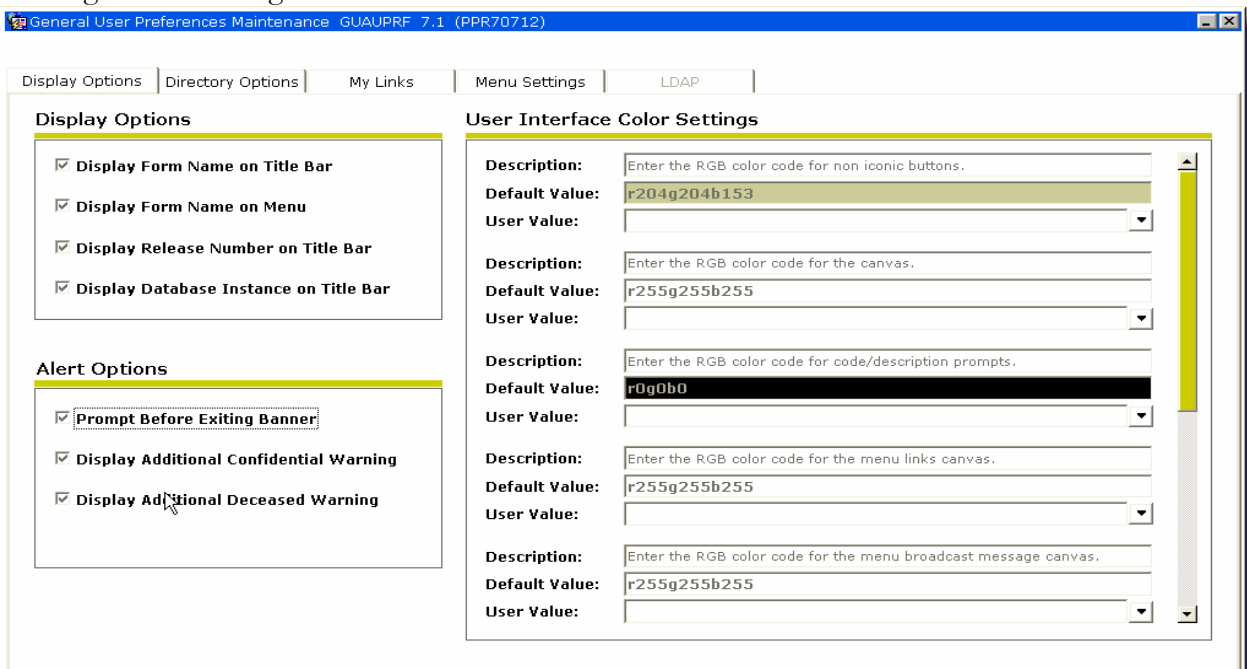
1. Choose Preferences from File menu
2. Display Options tab
3. Choose the desired Display Options and Alert Options
4. Choose the desired User Color Options

The User Interface Color Settings section customizes colors for various sections of Banner, such as:

-  Buttons, such as Cancel and OK (buttons in the toolbar are not included).
-  Canvas (white space) of all forms
-  Record highlighting
-  Scroll and separator bars
-  Code/Description prompts
-  Canvases within the main menu, including the broadcast message, menu, and menu tree canvases

To change the color setting:

5. Click on the dropdown arrow next to User Value
6. Select the new color
7. Click OK
8. Click OK
9. Exit Banner
10. Re-login to see changes to Banner menu



The screenshot shows a web browser window titled "General User Preferences Maintenance GUAUPRF 7.1 (PPR70712)". The window has several tabs: "Display Options", "Directory Options", "My Links", "Menu Settings", and "LDAP". The "Display Options" tab is active, showing a list of checkboxes for "Display Form Name on Title Bar", "Display Form Name on Menu", "Display Release Number on Title Bar", and "Display Database Instance on Title Bar". Below this is the "Alert Options" section with checkboxes for "Prompt Before Exiting Banner", "Display Additional Confidential Warning", and "Display Additional Deceased Warning". The "User Interface Color Settings" section is also visible, showing five rows of settings. Each row has a "Description", a "Default Value", and a "User Value" dropdown menu. The "User Value" dropdowns are currently set to the "Default Value".

Description	Default Value	User Value
Enter the RGB color code for non iconic buttons.	r204g204b153	r204g204b153
Enter the RGB color code for the canvas.	r255g255b255	r255g255b255
Enter the RGB color code for code/description prompts.	r0g0b0	r0g0b0
Enter the RGB color code for the menu links canvas.	r255g255b255	r255g255b255
Enter the RGB color code for the menu broadcast message canvas.	r255g255b255	r255g255b255

The **My Links tab** customizes the Personal Links that appear on the main menu.

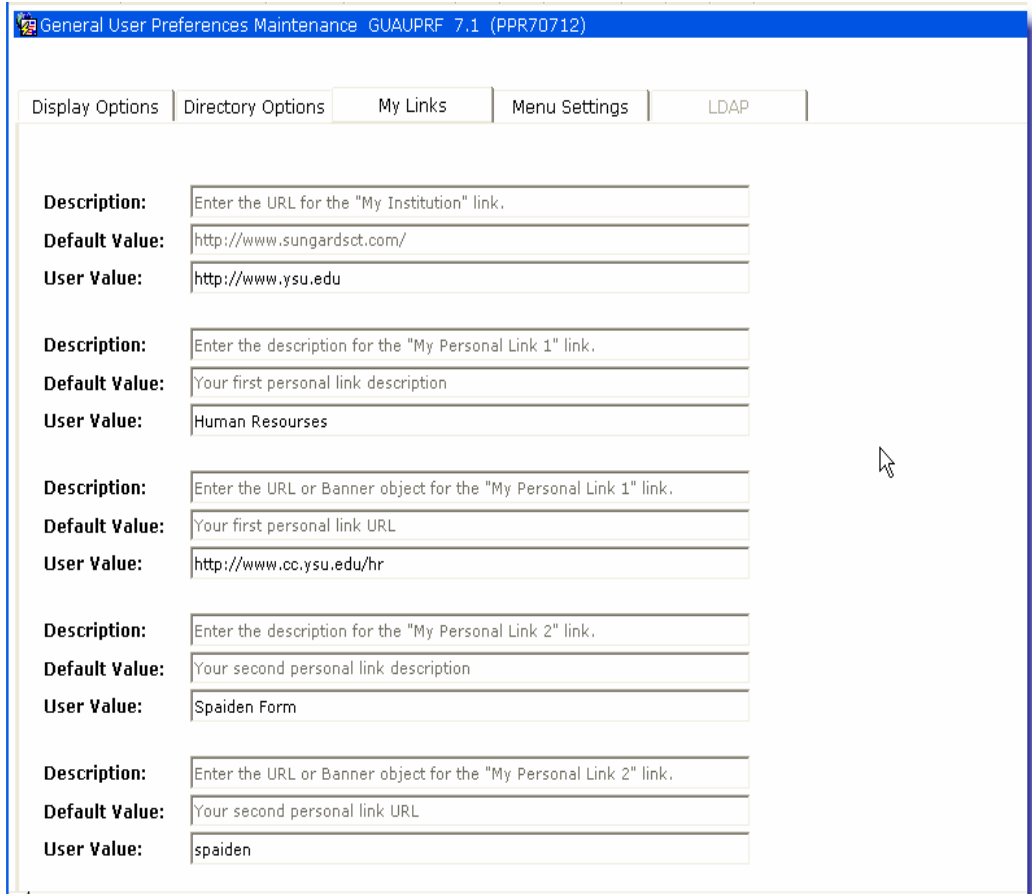
To add a Personal Link:

1. Click My Links tab
2. Click in the User Value field for the link description
3. Type a description for the link
4. Click in the User Value field for the link
5. Type the actual link

(if you are typing a web link, you must include the <http://> in front of the link (for example, <http://www.ysu.edu/>); if you are typing a form name, just type the 7-character name of the form).

Each of the six personal links are comprised of two records—the description and the URL/Banner object. Make sure that the description matches the corresponding URL or Banner object record

Make sure that you do not have pop-ups blocked with any third-party software—it can interfere with the performance.



Help

There are many resources available for getting more information on using Banner.

Banner Bookshelf

The Banner Bookshelf is a series of user guides and other documents that provide a general overview of features.



Adobe Acrobat will launch to display the Bookshelf files.



To access Banner Bookshelf:

1. Click Bookshelf icon from the right side of the Direct Access bar
2. Click Bookmarks tab on the left of the screen
3. Widen the Bookmarks pane, if necessary, by dragging the border line to the right
4. Click Expansion Plus Sign [+] of the desired item(s)
5. Continue to drilldown until desired information is located
6. Click desired bookmark link to read Bookshelf document
7. Print or save the document as needed

Online Help

Help Center Link

The Help Center link accesses the SCT Banner Help Center.

Release 7.0 features a new online help system that contains information about forms and fields, as well as tasks you can perform with Banner. This help system runs in a web browser, and is available by choosing the Online Help icon on the toolbar or the Online Help option from the Help menu. Additionally, you can access online help by selecting the Help Center link on the main menu.

For forms with no help, the Banner online help error page may not appear for Internet Explorer users who use IE's "friendly" error messages by default. For optimal performance in IE, clear the Show friendly HTTP error messages check box that is located on the Advanced tab of your Internet Options.

Accessing Online Help from a Form

The Online Help icon and Help menu option initially display information about the form on which you are working.

Accessing the Help Center

If you want information about forms and tasks for another Banner product, use the Help Center link, which is available from the main menu of Banner, or from anywhere within the help system.

Features of Online Help

You can browse, search, and use the index to locate topics in online help.

Browsing for Topics

The Contents tab and the bread crumb trail both enable you to browse for topics categorically. Form and field information is organized by Banner module. Task information is contained under the Procedures heading.

Searching for Topics

The Search tab allows you to search for topics within the help system. You can also use your browser's "search on page" feature to find specific text on a help page.

Using the Index

The Index tab provides an alphabetical listing of topics within the help system. When you enter the letters of a term, the index will scroll through the topics to the closest alphabetical match.

Using the Field Link

Many form descriptions are quite long, so sometimes you will find a link that goes to field descriptions on a separate page.

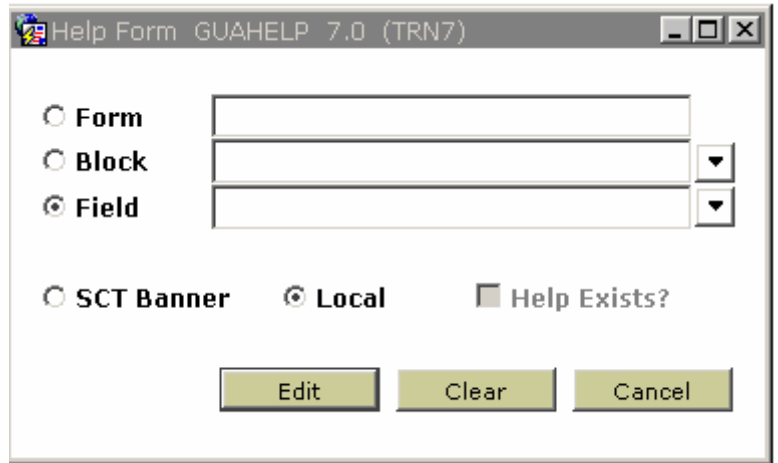
Using Dynamic Help Query

This feature is slowly being replaced by Online Help. Currently only a few forms have access to Online Help while most still have Dynamic Help Query. This feature is a built-in help system in Banner that gives information on specific fields, blocks, and forms used in Banner.

Although there are two areas; SCT Banner and Local, all information is provided in the SCT Banner area.

To use Dynamic Help Query:

1. Access desired form
2. Choose Dynamic Help Query from Help menu
3. Choose item to receive help (either Form, Block, or Field)

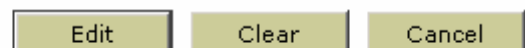


4. Check SCT Banner option
5. Click Display



All available help on that item will display

6. Click Cancel twice when finished

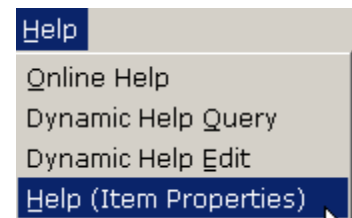


Help (Item Properties)




This help feature is designed to display the programming properties of each item in Banner.

To use Help (Item Properties):

1. Access desired form
2. Choose Help (Item Properties) from Help menu



Although this is basically used for programming, there are attributes that may be beneficial:

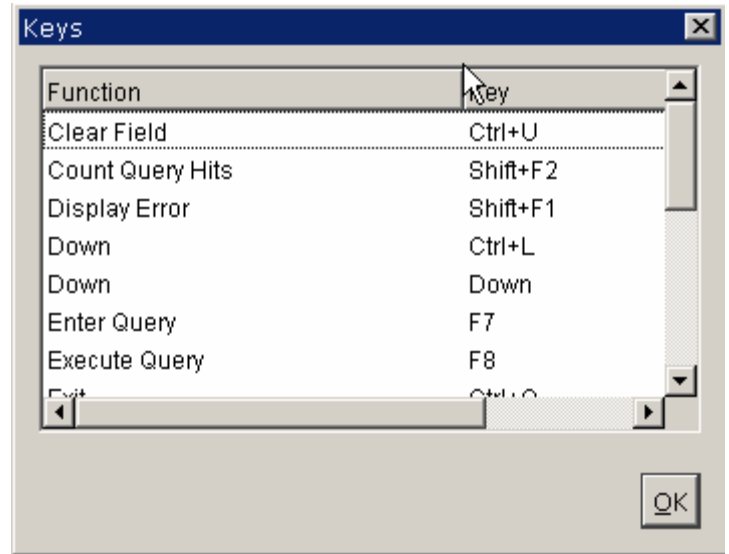
-  locate how many characters are available for a field
-  determine if a field is required
-  identify if a field is a query or update

Show Keys

This help option displays keyboard shortcuts and Oracle functions that could possibly be used in the current field, window, and/or form.

To use Show Keys:

1. Access desired form
2. Choose Show Keys from Help menu bar
3. Locate desired keyboard shortcut option
4. Click OK
5. Perform keyboard shortcut



Calendar

Banner has a built-in Calendar that can be used to view the current date and to place a particular date into a date field.

To access the Calendar:

1. Access desired form that contains date field
2. Double-click field

Calendar form (GUACALN) appears highlighting the current date

3. Double-click desired date



The current date in any date field can be populated by typing any character in the field.



Calculator

Banner also has a built-in Calculator that can be used similar to the Windows calculator.

To access the Calculator:

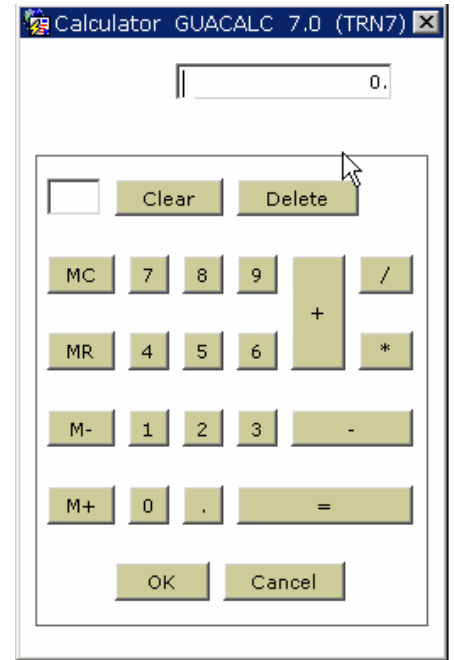
1. Choose Calculator from Help menu

Calculator form (GUACALC) appears

2. Perform desired calculation
3. Click OK







If the field is a calculated value, double-click on it to retrieve the calculator. Once the calculation is complete, Click OK to return the value to the field.




General Person Identification Form

There are over 2,000 individual forms available in Banner, each with its own specific purpose and method of usage. Each functional area at YSU will have forms they use most often. However, one type of form will be used by most functional areas on a regular basis is the General Person Identification form. This type of form is known by many Banner systems, but under different names. For example:

-  Student System: SPAIDEN
-  Finance System: FOAIDEN
-  Human Resources System: PPAIDEN
-  Advancement: APAIDEN

General Person Identification SPAIDEN 7.0.0.1 (TRN7)

ID: Generate ID: 

Current Identification | Alternate Identification | Address | Telephone | Biographical | E-mail | Emergency Contact

ID: Name Type:

Person

Last Name:

First Name:

Middle Name:

Prefix:

Suffix:

Preferred First Name:

Full Legal Name:

Non-Person

Name:

ID and Name Source

Last Update

User:

Activity Date:

Origin:

Original Creation

User:

Create Date:



Each one of these forms, although named differently, contains and provides much of the same information. Each form is dedicated to its own Banner system.

Example of Using General Person ID Form

Before someone can be anything else in Banner, they must first be entered as a person or a non-person. (A non-person would be a company or corporation.) Before you can be a student, you must be a person in Banner; before you can be an employee, you must first be a person; before you can be faculty, you must first be a person, etc.

The SPAIDEN Form is used by the student areas to input new people into the Banner system and/or to make changes to entry information. Since coming into the system through the SPAIDEN form, more than likely this person would be a student.

If the person were originally entered through PPAIDEN, which is the Human Resources department General Person Identification form, they more than likely would be a potential employee.

If the person were initially entered through RPAIDEN, which is Financial Aid's General Person Identification form, they more than likely would be applying for Financial Aid before even applying as a student.

If the person were being entered through FOAIDEN, which is Finance's General Person Identification form, they were receiving some type of financial benefit without being first entered in by Human Resources or the student areas.

If a person or company were being entered through FTMVEND, which is the Vendor Maintenance Form and accessible by multiple systems, they would be a Vendor (as a person or non-person). An individual person can be a Vendor as well as a company or corporation.

Persons can also possess multiple statuses. For example, an employee can also be a student. A student can also be a vendor. A vendor can also be an employee and a student. **Although each person can possess multiple roles, they are only entered into Banner once and only possess one "active" record within Banner.**


Before creating a new person/non-person record, SEARCH-SEARCH-SEARCH! It is **imperative** that before you enter a new record of any kind (person or non-person) into the Banner system that you thoroughly search to make sure that entry is not already in the system.

Creating "multiple" active records for the same person/non-person will make it impossible to correctly maintain records and data integrity will be jeopardized. The full Data Standards document is available online at the YES website <http://www.yсу.edu/YES>.

To use either SPAIDEN, PPAIDEN, FOAIDEN, FTMVEND, etc., to input a new person/non-person:

1. Access desired form
2. SEARCH thoroughly (at least three times) to see if the person/non-person to input is not already in the system

Once confirmed that the person/non-person is NOT already in the system

3. Click Maintenance icon to generate new ID number 

Insert information on Common Matching here

4. Move to next block
5. Type in all necessary information.
6. Access any Optional areas from the Options menu
7. Click Save icon
8. Exit the form

Banner Messaging

The View/Send Message icon provides the ability to send and receive messages from other Banner users at YSU. Messages are created and viewed on the General Message Form (GUAMESG).

This is a method of communicating among Banner members from directly within Banner and does NOT generate e-mail messages to an Outlook/Netscape/CUE, etc., mailbox. Some internal Banner messages will generate automatically for specific processes (i.e. when a requisition has been approved).

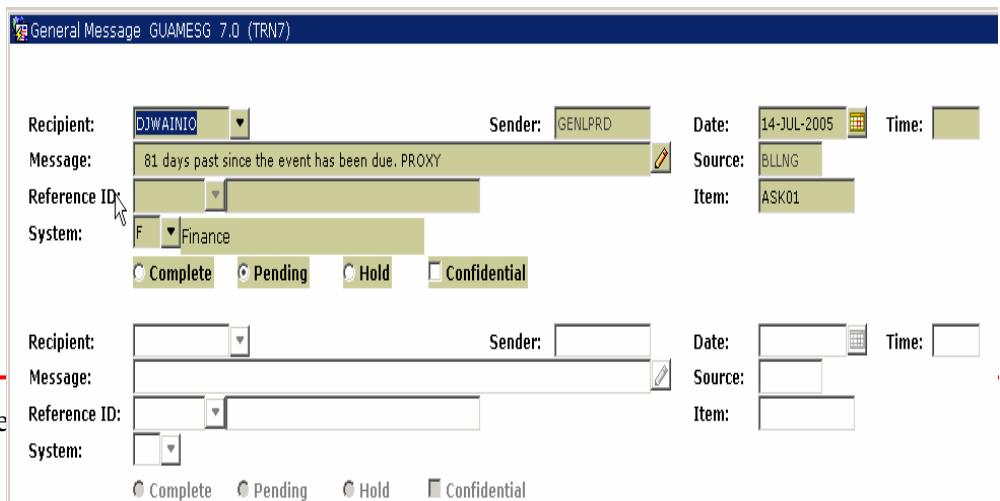
When a new message is available to view, the system displays a green checkbox the next time you return to the main menu. Returning to the main menu occurs when you access any form from the **Go** field, menu, or site map, and exit the form to return to the main menu.

To display your messages at any time:

1. Click the View/Send Message link from My Links

The GUAMESG Form appears with messages

2. Review messages
3. Click Complete
4. Click Save icon
5. Exit the form



General Message GUAMESG 7.0 (TRN7)

Recipient: DJWAINIO Sender: GENLPRD Date: 14-JUL-2005 Time: []

Message: 81 days past since the event has been due. PROXY Source: BLLNG

Reference ID: [] Item: ASK01

System: F Finance

Complete Pending Hold Confidential

Recipient: [] Sender: [] Date: [] Time: []

Message: [] Source: []

Reference ID: [] Item: []

System: []

Complete Pending Hold Confidential

To send messages:

1. Click the View/Send Message icon from the main menu toolbar

OR

- Access GUAMESG Form
2. Type: Recipient ID
 3. Type: Date
 4. Type: Message
 5. Type: System
 6. Determine Confidentiality status
 7. Click Save icon
 8. Exit the form



Don't forget!!! If the message is not marked confidential, it can be viewed by many others.

FOAPAL

Financial activities, the paying of expenses and accounting for incoming revenues, are based on an organizational method of processing. This organization is based on the idea of a hierarchy of related financial events.

The FOAPAL string of codes is the core of the Banner Finance System. FOAPAL is the hierarchy coding system used for classification, budgeting, and recording. It also gives users the ability of reporting and making inquiries at multiple levels.

Acronym	COA	F	O	A	P	A	L
Element	Chart of Accounts	Fund	Organization	Account	Program	Activity	Location
Identifies	Framework for accounting structure	Where the money is drawn from	Budget unit of the department processing the transaction	What financial activity is being recorded	Purpose of the transaction	N/A	Physical Location
Number of Characters per Field	1	6	6	6	2	6	6



- COA** Chart of Accounts is a systematic classification of accounts. YSU uses one COA: Y
- F** Fund identifies the source from which the money is being drawn.
- O** Organization identifies the department that is processing the transaction.
Examples: President's Office, Center for Urban Studies, College of Engineering and Technology.
- A** Account Code identifies the financial activity being recorded. Examples: assets, liabilities, fund balance, revenues, expenditures, transfer.
- P** Program identifies the purpose of the transaction. Examples: instruction, academic support.
- A** Activity is not currently used at YSU.
- L** Location is used only for fixed assets.

COA	F	O	A	P	A	L
<div style="display: flex; justify-content: space-between; align-items: center;"> COA </div> <input style="width: 100%; height: 20px;" type="text" value="v"/>	<div style="display: flex; justify-content: space-between; align-items: center;"> Fund </div> <input style="width: 100%; height: 20px;" type="text" value="111560"/>	<div style="display: flex; justify-content: space-between; align-items: center;"> Orgn </div> <input style="width: 100%; height: 20px;" type="text" value="25"/>	<div style="display: flex; justify-content: space-between; align-items: center;"> Acct </div> <input style="width: 100%; height: 20px;" type="text" value="72161"/>	<div style="display: flex; justify-content: space-between; align-items: center;"> Prog </div> <input style="width: 100%; height: 20px;" type="text" value="45"/>	<div style="display: flex; justify-content: space-between; align-items: center;"> Actv </div> <input style="width: 100%; height: 20px;" type="text"/>	<div style="display: flex; justify-content: space-between; align-items: center;"> Loch </div> <input style="width: 100%; height: 20px;" type="text"/>

Exiting Banner

Exiting Banner is a simple process. No matter where you are in Banner you can get out quickly and easily with no more than four clicks of the mouse.

To exit Banner:

- 1 Click Exit icon (blue and white [X])
- 2 Click again, if necessary
- 3 If an Alert box appears asking if you want to exit Banner, click Yes
- 4 Close the active browser window

Key Terminology

System:

A system is a term used to describe an overall area of administration within Banner. For example, Finance and Human Resources are both systems within Banner. These main level systems appear when you first login to Banner. They are displayed on the horizontal Products Link bar as well as in the vertical Main Menu tree. Systems will contain Modules and Forms.

Module:

A module is an area of administration within a system. For example, Accounts Payable is a module under the Finance System. Within the Accounts Payable module is information on the multiple processes that are required and the step-by-step instructions (procedures) for doing so. Modules will contain forms and may contain further sub-menus.

Process:

A process is the series of steps for completion of a particular feature in Banner. For example, Vendor Maintenance is a process that needs to be completed within the Accounts Payable module of the Finance System.

Procedure:

Procedures are the step-by-step instructions involved in completing a process. For example, some of the procedures for completing the Requisition process are as follows:

1. Open the Requisition Form (FPAREQN).
2. Type the word NEXT in the Requisition text box.
3. Press Ctrl + Page Down on keyboard to move to next block.

Forms:

A form is an online Banner document used to enter and/or look up information in the database. The form is the most basic product available in Banner. Banner is simply a collaboration of multiple forms working together to achieve a specific goal.



Terminology

Alert Box	A type of dialog box that notifies you of a condition that may affect how you can enter information or the kind of information you can enter. It requires you to acknowledge the message before you can continue.
Application Form	Form used to enter, update, or query information. (Most application forms will have the letter “A” in the third position of the form name.)
Block	An information area on a form typically indicated by a solid line or separate window.
Calling Form	Form from which you clicked a button and accessed another form.
Cancel	Exits you from an Option List, List of Values, Editor window, or Dynamic Help.
Clear Form	Clears all information and returns you to the first enterable field in the key information area.
Commit	Saves all changes entered since the last time you saved.
Count Hits	In query mode, counts the number of records that meet the search criteria and displays that number in the Auto Hint Line.
Count Query Hits	In query mode, counts the number of records that meet the search criteria and displays that number in the Auto Hint Line.
Dialog Box	A box containing information buttons such as Yes, No, or Cancel. Requires you to respond to it before you can continue.
Down	Use the <DOWN ARROW> key. Moves the cursor to the first enterable field in the next record, moves you lower on a List of Values, and moves you lower in a pull-down list.
Drop-down List	A drop-down list shows three or more values for a field. Any field with a down arrow icon contains a drop-down list.
Edit	Displays a window you can use to add, change, or delete text.
Enter Query	Puts the form into query mode and lets you enter search criteria to see what information is already in the database. Enter Query appears in the Status Line.
Execute Query	In query mode, searches the database and displays any records that match the search criteria
Exit with Value	From a called form, returns you to the calling form and enters the highlighted value into the field that called the form. From a List of Values (LOV), returns you to the calling form and enters the highlighted value into the field that called the form.
Exit without Value	From forms and windows, exits you out of the form or window without selecting a value.
Field	Area in a form where you can enter, query, change information, or where existing information is displayed. Banner describes fields as either enabled, disabled, enterable, or display only.
Form	Window containing enterable fields for a process.
Help	Displays the Oracle help window for the current field. (Online Help is gradually replacing SCT Banner Dynamic Help.)
Inquiry Form	Form used to look up existing information in the database. Allows you to view but not update. (An inquiry form will have the letter “I” in the third position of the form name.)

List of Values (LOV)	Displays a list of values for the current field if List of Values appears in the status line.
Menu	A list of options you can access with the mouse or keyboard.
Next Block	Moves the cursor to the next information area (block) that has at least one enterable field.
Next Field	The next enterable field in the current information area.
Next Item	The next enterable field in the current information area.
Next Record	Means to move the cursor to the first enterable field in the next record of the current information area. If the cursor is in the last record, a new record is created.
Object	An object can be a form, job, menu or QuickFlow used in Banner.
Online Help	Provides information for Banner forms, windows, blocks, and fields. Online Help is gradually replacing the SCT Banner Dynamic Help.
Option List	Dialog box displaying two or more items to choose from.
Previous Block	The previous information area that has at least one enterable field. If the previous area is another window, then that window is opened.
Previous Field	Means to move the cursor to the previous enterable field in the current information area.
Previous Item	Means to move the cursor to the previous enterable field in the current information area.
Previous Record	Means to move the cursor to the first enterable field in the previous record.
Query Form	Form used to look up existing information on the database. (A query form will have the letter "Q" in the third position of the form name.)
QuickFlow	A set of forms that are linked together in order to help you complete a process within Banner. When you use QuickFlow, it opens the first form in the set and the next form is automatically opened until the process is completed
Record	All information displayed in the window for an item
Rollback	From an application or inquiry form, clears all information and returns you to the first enterable field in the key information area. Rollback is a standard button and appears on most forms. From validation forms, rollback will return you to the first enterable field on the form. From a query form it will return you to the first enterable field on the calling form.
Save	Means to save all changes entered.
Scroll Down	The process of moving down repeating records or lists of information that cannot all be displayed in one window.
Select	Choose an item by highlighting it or clicking it with mouse.
Show Keys	Display the list of keyboard options.
Up	Use the <UP ARROW> key. Means to move the cursor to the first enterable field in the previous record, moves you upward on a List of Values or drop-down list. Use the arrow key.
Validation Form	Form used to define the values that can be entered in specified fields on application forms. (A validation form will have the letter "V" in the third position of the form name.)
Window	Displays an information area.