

Banner Getting Started Guide

November 2006

Release 7.4



SUNGARD HIGHER EDUCATION

What can we help you achieve?

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Banner

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Preface

Purpose/Audience

Documentation for Banner systems consists of complementary user guides, handbooks, technical reference manuals, and online help. User guides provide overview information such as form descriptions, report descriptions, and operations cycles. Handbooks provide in-depth information for specific areas within some products. Technical reference manuals provide information useful to technical staff. Online help provides form and field information.

The *Getting Started Guide* provides an introduction to the Banner system. New users can learn how to navigate through the application; understand the different types of forms used in Banner, and the parts of each form; perform queries for information; and customize Banner to best reflect their needs and preferences.

How to Use This Manual

This manual is organized into the following chapters:

Chapter 1, "Overview"

Chapter 2, "All About Forms"

Chapter 3, "Getting Around Banner"

Chapter 4, "Features of Banner"

Chapter 5, "Customization"

Chapter 6, "Tips and Tricks"

Index

Related Documentation

In addition to the *Banner Getting Started Guide*, the following documentation supports your work with Banner:

General User Guide—a user/reference manual for the General product, its functions and features.

General Technical Reference Manual—a technical reference manual on General utilities, with application-specific supplements.

Banner Documentation Bookshelf Getting Started Guide—a how-to manual directing the installation and maintenance of the Bookshelf.

General Release Guide —a document containing notes about a release of the product, including descriptions of the enhancements and other modifications in the new release.

GTVSDAX Handbook—a user/technical/reference manual describing the setup and use of the Crosswalk Validation Form (GTVSDAX), which is used with the Object:Access views.

General Upgrade Guide—a technical guide to support your institution's conversion to the newest release.

API —an Application Program Interface provides an overview, documents the parameters, and describes the logic of fundamental business units of Banner.

API Developer's Guide—a developer's guide that describes the proper treatment of APIs in the Banner system.

ERDs— Entity Relationship Diagrams provide documents and schematics that show the interrelationship between different database tables in Banner.

SunGard Higher Education Documentation File Naming Conventions

SunGard Higher Education uses similar naming conventions to create the file name of every document delivered in electronic format. This section describes the components of this name. The PDF file names for most electronic documents generated from Banner use the following naming convention: *Product Identifier / five-digit Release Identifier / Manual Type Identifier*. The Release Identifier uses five digits to accommodate products that distribute double-digit interim releases within a main release. An example of a file name for a manual delivered as one file is *humres70301rg.pdf*.

- The Product Identifier is *humres* for Human Resources.
- The five-digit release identifier is *70301* for 7.3.1.
 - The 7 represents the major release number of the product.
 - The 03 represents the mandatory interim release number.
 - The 01 represents an optional interim release number.
- The Manual Type Identifier identifies the type of documentation. For example, the initials *rg* represent release guide.
- This file name is followed by a .pdf extension which represents the Adobe Acrobat Portable Document Format (pdf).

Exceptions to this naming convention include:

- Some manuals are produced for multiple releases and require a date rather than a release number. For example, this Release Identifier would be 0605 for June 2005.

Some examples of valid document names are listed below:

<i>Document</i>	<i>PDF Name</i>
Finance Release Guide 6.5	finance60500rg.pdf
Human Resources Release Guide 7.0.1	humres70001rg.pdf
Employee Self-Service User Guide 7.2	empss70200u.pdf
Advancement TRM Supplement 6.6	advanc60600trmsup.pdf
GTVSDAX Handbook, May 2006	gtvsdax0506hb.pdf

SunGard Higher Education Documentation Distribution

SunGard Higher Education delivers Banner documentation to our clients in electronic format.

Electronic Documents on CD

User manuals, reference manuals, and other product documents are delivered as electronic files in portable document format (PDF) on one or more CDs. You may print the files in whole or in part, and copies may be freely distributed to users at your institution. Your system administrator may choose to make the PDF files available electronically from a secured intranet Web site, or directly from a network.

Online Documentation with the System

SunGard Higher Education also provides online documentation in the form of HTML-based help that runs in a web browser. Help is available for all Banner forms with the exception of certain security-restricted forms. Form and field descriptions

and task instructions form a comprehensive help support system for each of the Banner products. Form help provides an overview of the purpose and use of the form and procedural help relates the form functions to the real-life tasks you'll perform.

Banner Online Help can be accessed from the Online Help button on the toolbar, the Online Help option in the Help menu, and through the Help Center link on the main menu. It is delivered through a download from the Customer Support Center. Navigation features include a bread crumb trail, table of contents, index, and a search feature. More information about Online Help can be found in this document.

Dynamic Help, Local Dynamic Help, and Item Properties still exist and can be used to enter custom documentation. They also display column information when available.

Typographical Conventions Used in this Documentation

Special formatting is used in this document to enhance the meaning of various words. You will see italics, bold, and monospace. The meanings and examples of these conventions, listed below, show how they are used.

Italics

Italics identifies text when it is emphasized, an error message exists, or document appears, or the text represents a value. See the following examples:

<i>Reason</i>	<i>Example</i>
Emphasis	For this release, <i>Workflow</i> has been removed from Banner menus and form descriptions to more accurately reflect the functionality of these forms.
Error Message	The message was: <i>*WARNING* Dynamic parms exist at the Application level or Variable level that are not compiled into the selection ID(s). You should recompile the selection ID(s). New parms are: &SAISUSR_NAME.</i>
Document	For details, please refer to Section 1, "User Interface Enhancements," of the <i>Web General 6.1 Release Guide</i> .

<i>Reason</i>	<i>Example</i>
Value	With this release, disabled text is black. The text has the following codes: R=0 G=0 B=0

Bold

Bold indicates a field label. For example,

<i>Reason</i>	<i>Example</i>
Field Label	The Employer Name field is really an Edit box, like the comment fields.

Monospace

Monospace type identifies computer terms, code, or related items that should stand out.

<i>Reason</i>	<i>Example</i>
Computer Terms	Whenever either GORSEVS_USA_CITY or GORSEVS_NONUSA_CITY contained a city name that was longer than 16 characters and GORSEVS_SVTS_CODE contained C, an additional record was created even though nothing had been changed.
Code	Execute the following statements: <pre>set serverout on; call dbms_java.set_output(20000); begin gb_messaging.p_register_entity('\$CREATE_H ELLO_WORLD', gb_messaging.CREATE_OPERATION); gb_messaging.p_add_parameter('\$MESSAGE', 'Hello Banner World'); gb_messaging.p_publish; end; /</pre>
Related Items (URL)	http://www.sungardhe.com/Education/index.html

How to Contact SunGard Higher Education

Documentation Ordering Information

You may order a Banner documentation CD by mail, by telephone, by FAX, by ActionLine, by Customer Support Center, or by e-mail. Use the address and phone numbers listed below.

Address	SunGard Higher Education Distribution Services SunGard Higher Education 4 Country View Road Malvern, PA 19355
Telephone	(800) 522 - 4827, option 5 Distribution Services is staffed Monday through Friday, 9:00 am to 5:00 pm (EST).
FAX	(610) 578 - 6033
Customer Support Center	http://connect.sungardhe.com
E-mail	distserv@sungardhe.com

ActionLine

ActionLine personnel provide support to SunGard Higher Education maintenance customers. They help users resolve any questions or concerns that relate to SunGard Higher Education products.

The ActionLine telephone number for Bronze Maintenance level clients is:
800-522-4827

The ActionLine telephone number for Silver Maintenance level clients is:
866-265-9264

The ActionLine telephone number for Platinum Maintenance level clients is:
888-543-8094

Customer Support Center

The Customer Support Center refers to the secured area of SunGard Higher Education's World Wide Web site dedicated to ActionLine and other related services available to clients. Users must be registered to obtain access to the secured site. Users can request an account to gain access to SunGard Higher Education's secured Customer Support Center by accessing <http://connect.sungardhe.com>, and proceeding as follows:

1. In the Customer Support Center Login area, select the link Request a Customer Support Center Account to create a new account.
2. Follow the instructions on the subsequent pages.
 - (a) Select *Customer Support Center Admin*.
 - (b) Enter your e-mail address.
 - (c) Select *Request for Username/Password*.
 - (a) Enter your full name, the institution you are representing, your role at the institution and your phone number in the body of the message.
 - (d) Select Submit.

SunGard Higher Education will verify your information as a new user and send a confirmation e-mail message when the Customer Support Center account has been set up and you are registered.

Within the Customer Support Center you can take advantage of the following online functions:

- Search through SunGard Higher Education Solutions/FAQs, documentation, downloads, defects or Request for Product Enhancements (RPEs).
- Obtain the latest software updates and patches.
- Access the complete SunGard Higher Education documentation library.
- View, update, and track support for SunGard Higher Education products as Service Requests.
- Submit and track the status of product defects and RPEs.
- Review your institution's products, contact information, entitlements, and download history.

SunGard Higher Education Education Centers

SunGard Higher Education's Education Centers provide a centralized location for training on the entire Banner series of systems and on various other products, including Oracle. The Education Centers provide an environment where SunGard Higher Education clients can leave behind daily office responsibilities and focus their attention on learning to use Banner. The Centers also offer an ideal opportunity to interact with colleagues from other installations, compare notes on implementations, and share information.

The SunGard Higher Education Education Center courses are led by seasoned SunGard Higher Education professional service consultants. Participants receive detailed training on each specific module. They are also provided with SunGard Higher Education Professional Services training materials that can be used for internal training upon their return to their respective institutions. Each class is conducted as a hands-on training session. Classes covering each module of the Higher Education Banner series are available on a regularly scheduled basis.

SunGard Higher Education Education Centers are located in:

Malvern, PA
Rochester, NY
San Diego, CA
Salt Lake City, UT
Toronto, Canada
Altrincham, UK

Consulting/Modification Services

SunGard Higher Education offers several Banner short- and long-term consulting and custom system modification services. Your institution's SunGard Account Representative will work with you to determine a package of support services that meets your needs.

Chapter 1 Overview

Introduction

This handbook describes the basic features of the Banner System. Learning to use these features is the foundation for using Banner at your institution.

Sample forms in this handbook were created in a Windows environment. Your forms may have subtle differences if you use a different environment; however, most functionality is the same regardless of your environment.

Starting Banner

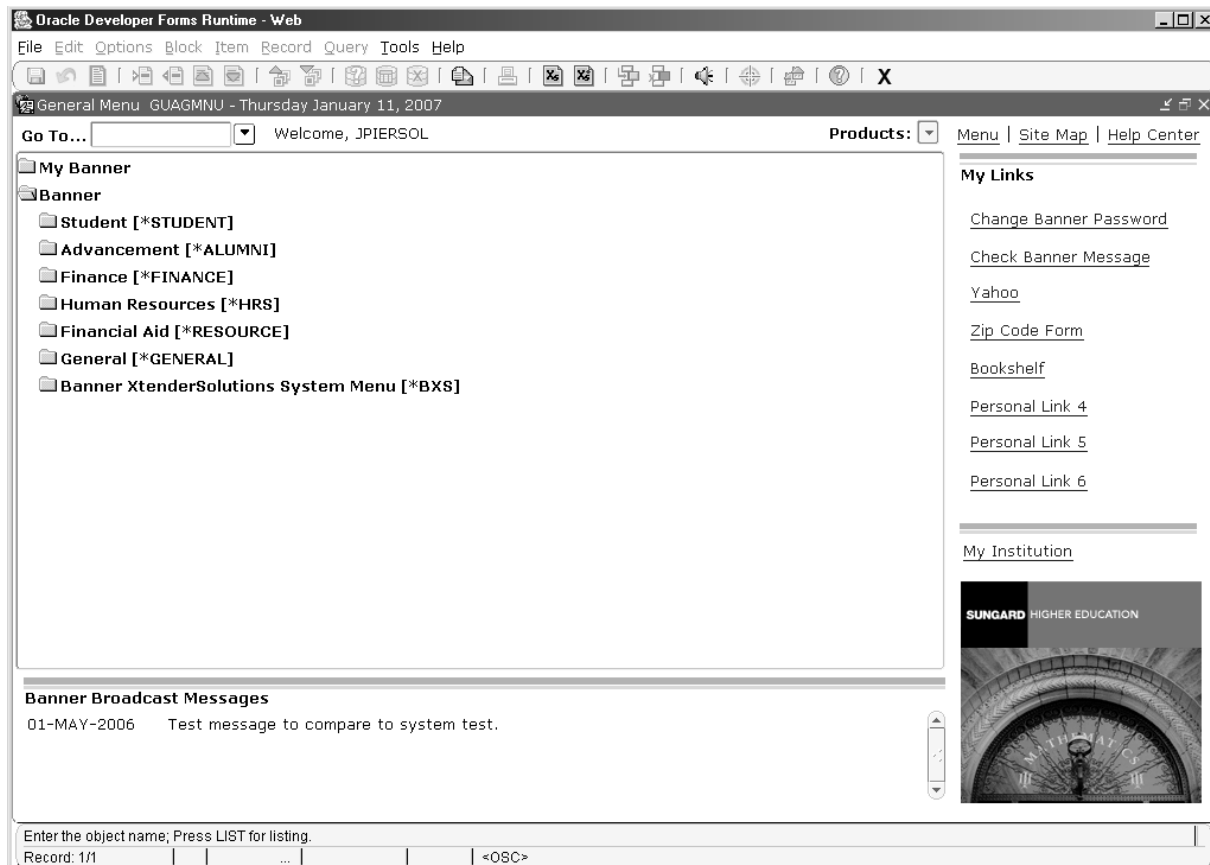
The steps for accessing Banner depend on your hardware, software, and network configuration. Because there are many ways to access Banner, this section does not give specific steps for launching your system. Instead, this section describes the common requirements for getting into Banner. Your institution's implementation may be different.

To help ensure that only authorized users access Banner, you must log in with a username (user ID) and a password. Your institution may have additional network and operating system login and security procedures.

These are the common steps for starting Banner.

1. Use your institution's procedures to start your workstation.
2. Launch your web browser and enter the URL used to access Banner.
3. Enter your username, password, and database (depending on your environment) at the logon prompts. If you enter a wrong username or password, you are prompted to reenter both. (Your institution determines the number of times you can try to log on.)

Once you complete these steps, the Banner main menu appears:



Select the folder next to a menu to expand the menu so you can see the objects it contains. Select the folder again to collapse the menu.

In this figure the Products Menu is expanded. Your institution may be using another menu as the default expanded menu on the main menu. Individual users can override the institution default and establish a personal default. See the *Banner General Technical Reference Manual* for instructions on setting the institution default. See “To Specify the Default Expanded Menu” in chapter 5 for instructions on setting a personal default.

The main menu is the starting point for navigating through Banner. You can use the menu structure to access a form, job, menu, or QuickFlow. Or you can use Direct Access to go to a specific form if you know the form’s name. Navigation is described in chapter 3, *Getting Around Banner*.

Using the Mouse and Keyboard

You can perform most Banner functions with either a mouse or keyboard. For example, you can save information by clicking a button on the toolbar, selecting an item from a pull-down menu, or pressing equivalent keystrokes.

Because you can choose from several methods, this handbook does not usually tell you specifically how to perform a function. Instead, the instructions say to “select” the function. Mouse and keyboard instructions are given only if they are distinctly different from each other. Two symbols appear throughout this handbook to indicate the different sets of instructions:



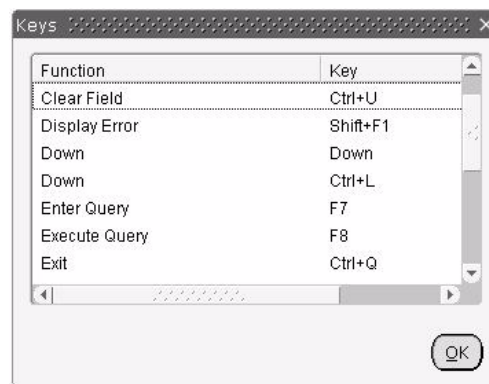
Mouse instructions



Keyboard instructions

Keyboard Equivalents

Specific keystrokes for a function depend on your environment. For example, Enter Query might be F7 in one environment and F11 in another. Because keystrokes vary from one environment to another, they are not described in this manual. Show Keys is a valuable tool that helps you use the keyboard. This function lists the keyboard equivalents available in your environment for the current form, window, and field.



Show Keys lists the keyboard equivalents that are available in your environment for the current form, window, and field.

To display keyboard equivalents:



Select Help>Show Keys.

OR

Use the keystrokes for the Show Keys function. (Check with your data center personnel for these keystrokes.)

Quick Reference Chart

You can complete the chart on the next page and use it as a quick reference for keyboard equivalents at your institution. First use Show Keys to determine the equivalent for each option on the Banner pull-down menus. Then record each equivalent on the chart. You can post the chart for easy reference.

File	Edit	Options	Block	Item	Record	Query	Help
Direct Access	Cut	Varies by form	Previous	Previous	Previous	Enter	Online Help
Object Search	Copy		Next	Next	Next	Execute	Dynamic Help Query
QuickFlow	Paste		Clear	Clear	Scroll Up	Last Criteria	Dynamic Help Edit
Select	Edit			Duplicate	Scroll Down	Cancel	SCT Banner Bookshelf
Rollback					Clear	Count Hits	Help (Item Properties)
Save					Remove	Fetch Next Set	Show Keys
Refresh					Insert		List
Print					Duplicate		Display Error
Exit					Lock		Display ID Image
Exit QuickFlow							Calendar
Preferences							Calculator
SCT Banner XtenderSolutions							Extract Data with Key
SCT Banner XtenderSolutions Info							Extract Data No Key
							Technical Support
							About SCT Banner

Naming Conventions

Banner form, report, job, and table names have the following structure.

Note: For information about table and column naming conventions, refer to the *General Technical Reference Manual*.

Position 1 identifies the primary system owning the form, report, job, or table. (See note on page 1-8.)	A Advancement	K Work Management	T Accounts Receivable
	B Property Tax	L Occupational Tax/License	U Utilities
	C Courts	N Position Control	V Voice Response
	D Cash Drawer	O Customer Contact	X Records Indexing
	E XtenderSolutions	P HR/Payroll/Personnel	W Reserved for client Y applications that co-exist Z with Banner
	F Finance	Q Electronic Work Queue	
	G General	R Financial Aid	
	I Information Access	S Student	

Position 2 identifies the module owning the form, report, job, or table.	Advancement (A)		Financial Aid (R)		HR/Payroll/Personnel (P) Position Control (N)	
	A	Membership	B	Budgeting	A	Application
	D	Designation	C	Record Creation	B	Budget
	E	Event Management	E	Electronic Data Exchange	C	COBRA
	F	Campaign	F	Funds Management	D	Benefit/Deductions
	G	Pledge and Gift/Pledge Payment	H	History and Transcripts	E	Employee
			J	Student Employment	H	Time Reporting/History
	L	Label	L	Logging	O	Overall
	M	Prospect Management	N	Need Analysis	P	General Person
	O	Organization	O	Common Functions	R	Electronic Approvals
	P	Constituent/Person	P	Packaging & Disbursements	S	Security
	S	Solicitor Organization	R	Requirements Tracking	T	Validation/rule table
	T	Validation form/table	S	Student System Shared Data	U	Utility
	U	Utility	T	Validation form/table	V	Reserved-Can. Solution Ctr.
	V	Reserved-Can. Solution Ctr.	U	Utility	X	Tax Administration
	X	Expected Matching Gift	V	Reserved-Can. Solution Ctr.		
	Finance (F)		General (G)		Student (S)	
	A	Accounts Payable	E	Event Management	A	Admissions
	B	Budget Development	J	Job Submission	C	Catalog
	C	Cost Accounting	L	Letter Generation	E	Support Services
	E	Electronic Data Interchange	O	Overall	F	Registration/Fee Assessment
	F	Fixed Assets	P	Purge	G	General Student
	G	General Ledger	S	Security	H	Grades/Academic History
	I	Investment Management	T	Validation form/table	I	Faculty Load
	N	Endowment Management	U	Utility	K	Reserved-Intntl. UK
	O	Operations	V	Reserved-Can. Solution Ctr.	L	Location Management
	P	Purchasing/Procurement	X	Cross product	M	CAPP
	R	Research Accounting	Accounts Receivable (T)		O	Overall
	S	Stores Inventory	F	Finance Accounts Receivable	P	Person
	T	Validation form/table	G	General Accounts Receivable	R	Recruiting
	U	Utility	O	Overall	S	Schedule
	V	Reserved-Can. Solution Ctr.	R	Research Accounting	T	Validation form/table
	X	Archive/Purge	S	Student Accounts Receivable	U	Utility
	Information Access/Kiosk (I)		T	Validation form/table	V	Reserved-Can. Solution Ctr.
	R	Financial Aid	U	Utility	XtenderSolutions (E)	
	S	Student	V	Reserved-Can. Solution Ctr.	T	Validation form/table
					X	XtenderSolutions
	All Products					
	W Reserved for client forms or modules used within a Banner application					
	Y (character in position 1 does not equal W, Y, or Z)					
	Z					

Position 3 identifies the type of form, report, job, or table.	Advancement (A)		Financial Aid (R)		HR/Payroll/Personnel (P) Position Control (N)	
	A	Application form	A	Application form	A	Application form
	B	Base table	B	Base table	B	Base table
	C	Called/list form	I	Inquiry form	Batch COBOL process	
	I	Inquiry form	P	Process/report	I	Inquiry form
	P	Process/report	R	Rule table	P	Process
	R	Repeating rules table		Repeating rules table	R	Rule table
	T	Temporary table		Report	Repeating table	
	V	Validation form View	T	Temporary table	Report/process	
			V	Validation form/table View	V	Validation form/table
	Finance (F)		General (G)		Student	
	A	Application form	A	Application form	A	Application form
	B	Base table	B	Base table	B	Base table
	I	Inquiry form	Batch COBOL process		I	Inquiry form
	M	Maintenance form	I	Inquiry form	P	Process
	Q	Query form	O	Online COBOL process	Q	Query form
	R	Rule table	Q	Query form	R	Rule table
		Repeating table	R	Rule table/form	Repeating table	
		Report/process		Repeating table	Report/process	
	V	Validation form/table View		Report/process	V	Validation form/table View
	Accounts Receivable (T)		T	General maintenance Temporary table	Information Access/Kiosk (I)	
	A	Application form	V	Validation form/table View	R	Report
	I	Inquiry form			XtenderSolutions (E)	
	P	Process			A	Application form
	Q	Query form			V	Validation form/table
	R	Report				
	V	Validation form/table				

Positions 4, 5, 6, and 7 uniquely identify the form, report, job, or table.

Examples

GUAIDEN		GJRRPTS		GTVZIPC	
G	General	G	General	G	General
U	Utility	J	Job Submission	T	Validation form/table
A	Application	R	Report	V	Validation form/table
IDEN	Identification	RPTS	Report and Parameter Information	ZIPC	ZIP/Postal Code

Note: The system identifier in position 1 can be one or two characters long. If the identifier is one character long, the form, report, job, or table name is seven characters long. If the identifier is two characters long, the name is eight characters long.

Chapter 2 All About Forms

What Is a Form?

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

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

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 system. Not all windows are the same size, so you might see parts of more than one window at the same time.

This form has three open windows:

- main window
- Revenue window
- Expenses window

The Expenses window is the active window, indicated by the highlighted title bar.

The screenshot shows the Oracle Developer Forms Runtime interface. The top window is titled 'Event Function - GEAFUNC 7.1 (s4b70)' and contains fields for 'Event' (A0005), 'Wellington Advantage Winners', and 'System' (Student). Below it is the 'Revenue - GEAFUNC 7.1 (s4b70)' window, which displays a table with columns: Code, Budget Amount, Actual Amount, Difference, and Revenue Date. The 'Expenses - GEAFUNC 7.1 (s4b70)' window is the active window, also displaying a table with columns: Code, Budget Amount, Actual Amount, Difference, and Expense Date. The 'Expenses' window title bar is highlighted, indicating it is the active window.

Code	Budget Amount	Actual Amount	Difference	Revenue Date
AL Alumni Relations Operating	10.00	10.00	0.00	13-APR-2004

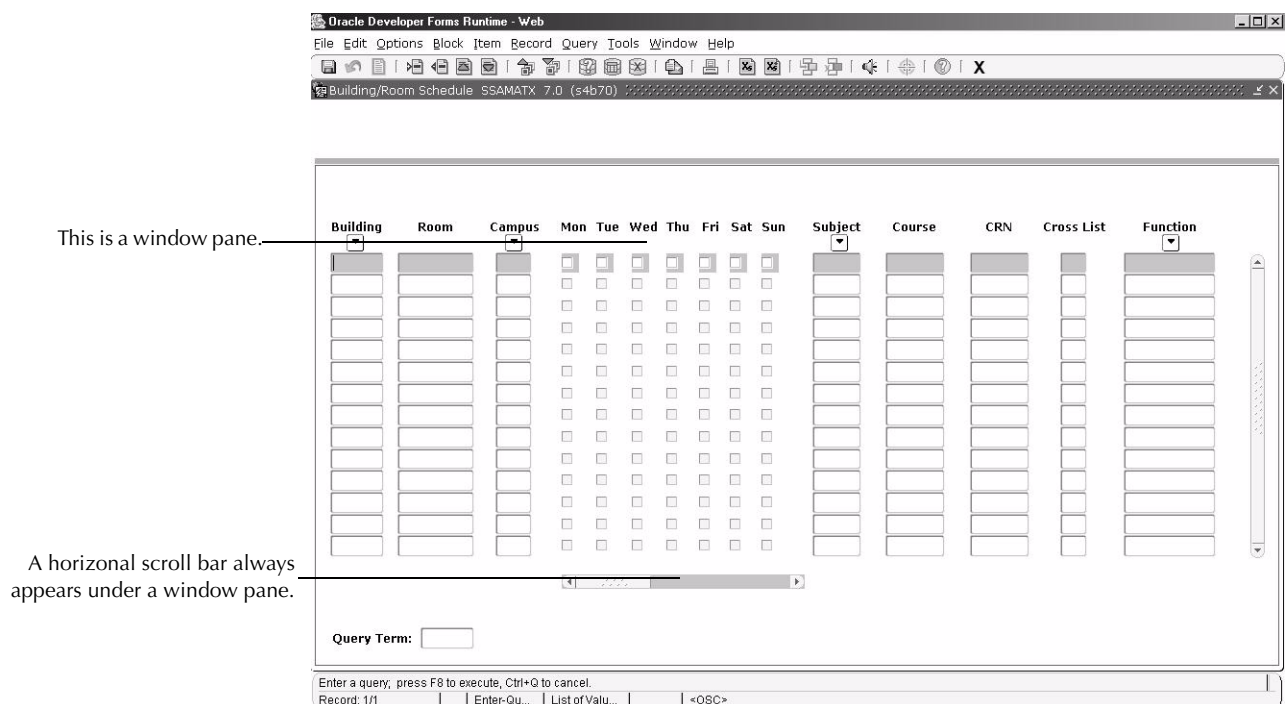
Code	Budget Amount	Actual Amount	Difference	Expense Date
AW Awards	10.00	10.00	0.00	13-APR-2004
Totals:	10.00	10.00	.00	

You can move a window by dragging its title bar to a new location. (You cannot move the title bar above the screen.) Your environment may let you resize and move windows in other ways. Refer to the documentation for your environment.

Caution: Banner windows do not use the close button (☒) in the upper right corner. Choosing that button will close the form.

Window Panes

A window pane is an area within a window that has more fields than can appear at one time.



You can use the horizontal scroll bar at the bottom of a window pane to see the remaining fields in the pane. You cannot see all fields at one time.

To scroll through the fields in a window pane:



Click and drag the scroll box right or left.

OR

Click the arrow at either end of the scroll bar.

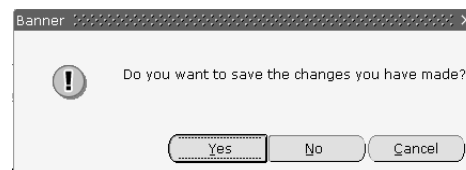


Select the Next Item function (to move to the right) or the Previous Item function (to move to the left).

Note: The cursor skips display-only fields, moving only to enterable fields.

Dialog Boxes

A dialog box is a window that appears when you must choose from two or more responses.



This dialog box has three possible responses.

You must acknowledge a dialog box before you can do anything else on the form.

To acknowledge a dialog box:



Click the button you want.

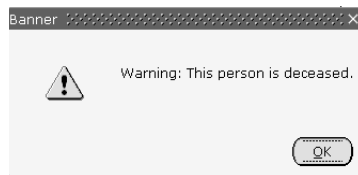


1. Select the Next Item function to move to the button you want.
2. Press Enter.

Alert Boxes

An alert box is a window that notifies you of a condition that may impact data. You can choose to receive extra alerts when accessing IDs of deceased people, or for IDs that are confidential in nature. Refer to chapter 5 for information about setting up extra confidential and deceased notifications.

For example, this alert box may appear if you try to enter information for a deceased person:



An alert box always has one response.

You must acknowledge an alert box before you can do anything else on the form.

To acknowledge an alert box:



Click the OK button.



Press Enter.

Types of Forms

Eight types of forms are used throughout Banner:

Main menu	Use this form to navigate through Banner. It provides an overview of the menus, forms, jobs, and QuickFlows in the system.
Application forms	Use these forms to enter, update, and query information. This is the most common type of form.
Validation forms	Use these forms to define the values that can be entered in specific fields on application forms. These values are used throughout Banner. When you look up a code or select the List function, these values appear in the List of Values window.
Rule forms	Use these forms to define the calculations and parameters that impact processing on other forms, reports, and jobs.
Control forms	Use these forms to define the processing rules for application and validation forms at the system level.
Query forms	Use these forms to look up existing information, often returning information to the calling form. You must access these forms from another form. You cannot access them directly from the main menu, with Direct Access, or with Object Search.

Inquiry forms	Use these forms to look up existing information, often returning information to the calling form. You can access these forms from the main menu, from another form, with Direct Access, or with Object Search.
Wizard forms	Use these forms to give step-by-step instructions for completing an application.

Validation, rule, and control forms are used to tailor Banner to your institution's procedural requirements when Banner is implemented. You can make revisions with these forms any time, if your security level permits.

Note: Only Banner General uses all of the different form types. Most products use only five or six.

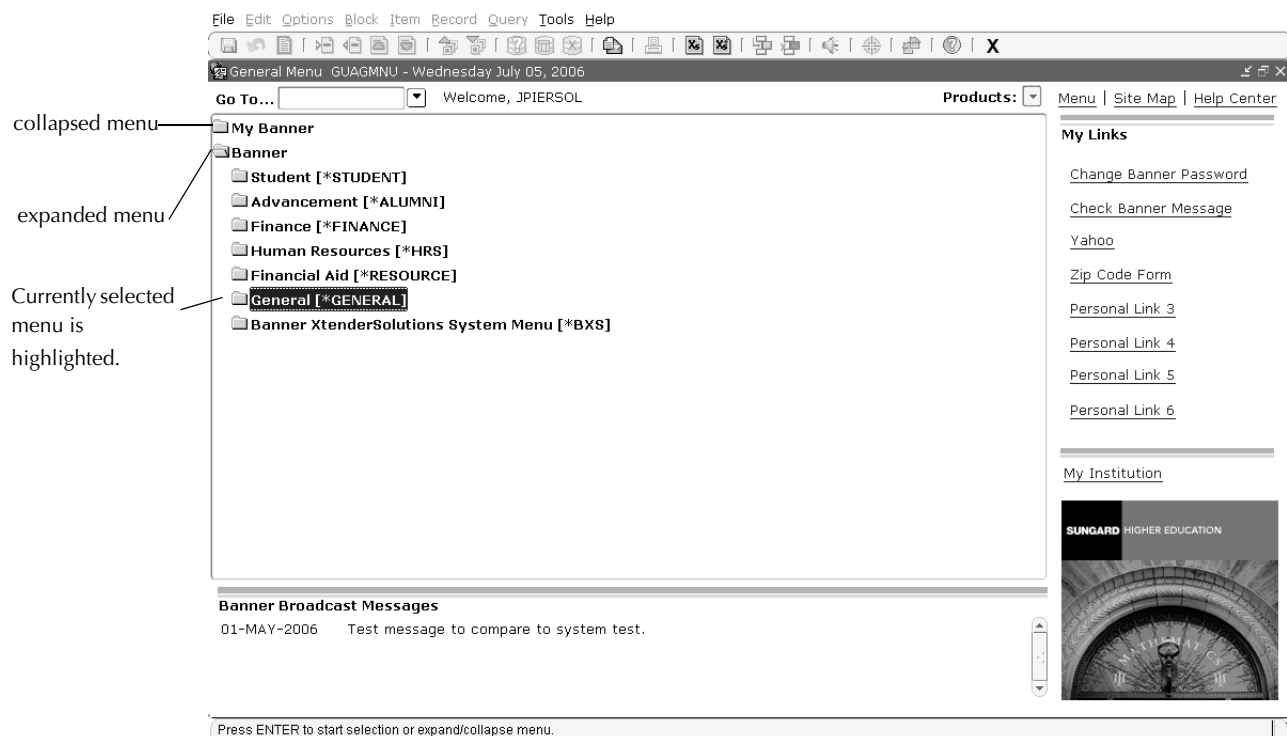
Main Menu

The main menu provides access to the menus, forms, jobs, and QuickFlows in Banner, and is used to navigate through Banner. Refer to chapter 3, "Getting Around Banner," for instructions about using the main menu to navigate.

The main menu displays the Banner products in a familiar Windows-style hierarchical folder structure. Standard menus are delivered with Banner, but your institution can reorganize and add menus to meet your specific needs.

2 All About Forms

Types of Forms



Using the Banner Menu Folders

The main menu provides many options for navigating Banner, as well as a place to create your own custom menus and links for frequently accessed forms, processes, and external web sites. These features are described briefly here, and in more detail in chapter 3, *Getting Around Banner*.

The large pane of the main menu displays two menus:

- **My Banner.** This menu contains the menus, forms, jobs, and QuickFlows most important in the workday of the individual user. This menu is tied to a user's Oracle user ID.
- **Products Menu.** This menu organizes menus, forms, jobs, and QuickFlows by the following Banner products: Student, Advancement, Finance, Human Resources, Financial Aid, General, and Banner XtenderSolutions.

The main menu is delivered with the Products Menu expanded. During installation, your system administrator can establish another menu as the default expanded menu. Individual users can override the institution default and establish a personal default for the menu that is expanded on the main menu. See the *Banner General Technical Reference Manual* for instructions on setting the institution default. See "To Specify the Default Expanded Menu" in chapter 5 for instructions on setting a personal default.

Customizing Menus

You can use the following forms to customize menus for your entire institution or individual users:

Menu Maintenance Form (GUTGMNU)	Lets you create custom menus for your institution. See "Customizing Menus" in chapter 5.
My Banner Maintenance Form (GUAPMNU)	Lets you create a My Banner for an individual user. See "My Banner" in chapter 5.
My Banner Copy Form (GUTPMNU)	Lets you copy a My Banner from one user to other users. See "My Banner" in chapter 5.

Application Forms

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

[illegible]

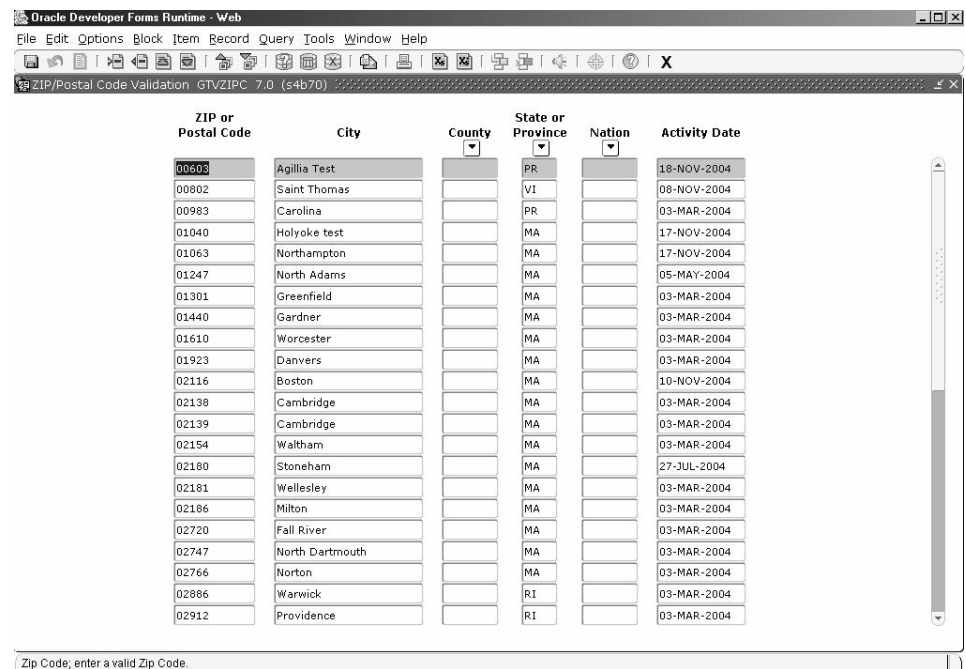
The Letter Process Form (GUALETR) is an example of an application form.

Validation Forms

Validation forms are used to define the values that can be entered in specific fields on application forms. These values make up a field's List of Values (LOV).

Banner uses LOVs to validate many fields. When the cursor is in a field that must be validated, **List of Values** appears in the status line, indicating that the entry must come from the LOV. If you try to enter a value that isn't in the LOV, an auto hint message appears. See "Entering Information Into Validated Fields" in chapter 3 for more information.

Most validation forms are completed when Banner is implemented. If your security level permits, you can use a validation form to enter new values or update existing ones. Remember, you can only change values with a validation form, not through an LOV window.



ZIP or Postal Code	City	County	State or Province	Nation	Activity Date
00603	Agillia Test		PR		16-NOV-2004
00802	Saint Thomas		VI		08-NOV-2004
00983	Carolina		PR		03-MAR-2004
01040	Holyoke test		MA		17-NOV-2004
01063	Northampton		MA		17-NOV-2004
01247	North Adams		MA		05-MAY-2004
01301	Greenfield		MA		03-MAR-2004
01440	Gardner		MA		03-MAR-2004
01610	Worcester		MA		03-MAR-2004
01923	Danvers		MA		03-MAR-2004
02116	Boston		MA		10-NOV-2004
02138	Cambridge		MA		03-MAR-2004
02139	Cambridge		MA		03-MAR-2004
02154	Waltham		MA		03-MAR-2004
02180	Stoneham		MA		27-JUL-2004
02181	Wellesley		MA		03-MAR-2004
02186	Milton		MA		03-MAR-2004
02720	Fall River		MA		03-MAR-2004
02747	North Dartmouth		MA		03-MAR-2004
02766	Norton		MA		03-MAR-2004
02886	Warwick		RI		03-MAR-2004
02912	Providence		RI		03-MAR-2004

Zip Code; enter a valid Zip Code.

The ZIP/Postal Code Validation Form (GTVZIPC) is an example of a validation form.

Rule Forms

Rule forms are used to define the calculations and parameters that impact processing on other forms, reports, and jobs. These forms let you tailor Banner to your institution's procedural requirements. You can enter new rules or revise existing ones if your security level permits.

[illegible]

The Object Definition Rules Form (GLROBJT) is an example of a rule form.

Control Forms

Control forms are used to define the processing rules for application and validation forms at the system level. You can enter new controls or revise existing ones if your security level permits.

Oracle Developer Forms Runtime - Web
File Edit Options Block Item Record Query Tools Window Help

Installation Controls GUAINST 7.0 (s4b70)

Name: BANNER University
Address: Systems & Computer Technology
Four Country View Road
Great Valley Corporate Center
Malvern PA 19355
Nation: 157 United States of America
Phone: 215 6475930
Operating/System: UNIX
Installation Type: Higher Education
Instance Name: s4b70
Activity Date: 19-JAN-2005

ZIP/Postal Code Length:
Base Currency: USD United States Dollar
Maximum Number of Open Forms:
Century Pivot: 49
Default Date Format: MDY
DMY
YMD

System/Process Enable Indicators:
☒ Online Matching Process Enabled
☒ Workflow Enabled
☐ SQL Trace Enabled
☐ Messaging Enabled

Installation Information

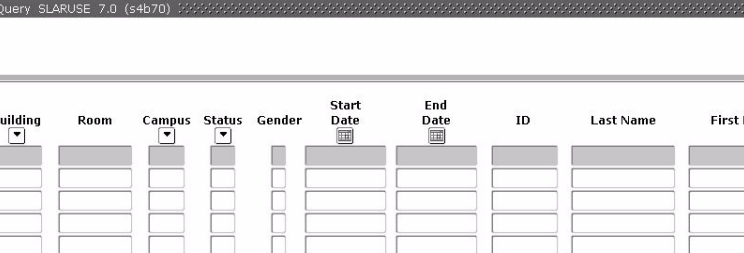
	Release	Date
<input checked="" type="checkbox"/> Advancement	7.0	12-AUG-2004
<input checked="" type="checkbox"/> Accounts Receivable	7.0	25-AUG-2004
<input checked="" type="checkbox"/> Financial Aid	7.0	31-AUG-2004
<input type="checkbox"/> Other Financial Aid		
GENERAL	7.0	10-AUG-2004

	Release	Date
<input checked="" type="checkbox"/> Finance	7.0	25-AUG-2004
<input checked="" type="checkbox"/> Human Resources	7.0	12-AUG-2004
<input checked="" type="checkbox"/> Position Control	7.0	12-AUG-2004
<input checked="" type="checkbox"/> Student	7.0	31-AUG-2004

The Installation Control Form (GUAINST) is an example of a control form.

Query Forms

Query forms are used to look up existing information, often returning information to the calling form. You must access a query form from another form. You cannot access it directly from the main menu, with Direct Access, or with Object Search.



Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Tools Window Help

Form Room Query SLARUSE 7.0 (s4b70)

Term	Building	Room	Campus	Status	Gender	Start Date	End Date	ID	Last Name	First Name

Enter a query, press F8 to execute, Ctrl+Q to cancel.

The Dorm Room Query Form (SLARUSE) is an example of a query form.

Inquiry Forms

Inquiry forms are used to look up existing information, often returning information to the calling form. You can access an inquiry form from the main menu, from another form, with Direct Access, or with Object Search.

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Tools Window Help

Function Attendance Inquiry GEIATTD 7.0 (s4b7D)

Event: System:

Function: Fee Status: RSVP: Menu:

Guest Indicator: ☐ Has Guest
☐ Has No Guest
☒ No Guest Criteria

Invitee/Guest Indicator: ☐ Invitee
☐ Guest
☒ Both

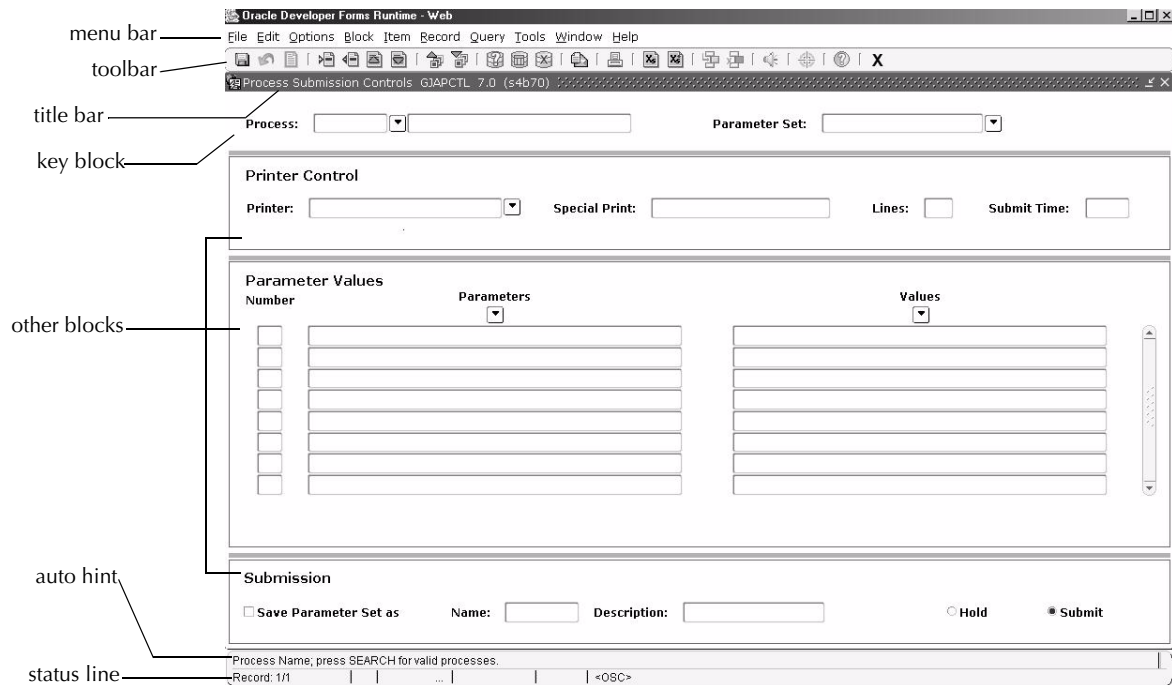
Attended Indicator: ☐ Attended
☐ Did Not Attend
☒ No Attendance Criteria

Count

ID	Name	Function	RSVP	Fee Status Code	Tickets	Guest	Invitee/Guest	Attendance
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Event; press COUNT QUERY HITS for valid events.

The Function Attendance Inquiry Form (GEIATTD) is an example of an inquiry form.



Menu Bar

The Banner menu bar, located at the top of every form, contains pull-down menus.

File Edit Options Block Item Record Query Tools Help

You can access an option in a pull-down menu at any time, except when you are in a dialog box, alert box, or List of Values (LOV). (You must respond to these windows before you can access a pull-down menu.)

To access an option in the menu bar:

Note: If a pull-down menu item is dimmed, that menu item is currently disabled and cannot be accessed.



1. Click the desired pull-down menu name. Menu items appear.
2. Click the desired menu item.



1. Press the Alt key. The cursor moves to the menu bar.
2. Use the right and left arrow keys to highlight the desired pull-down menu name. Then press Enter.

OR

Press the underlined letter for the desired pull-down menu name.

3. Use the up and down arrow keys to highlight the desired menu item. Then press Enter.

OR

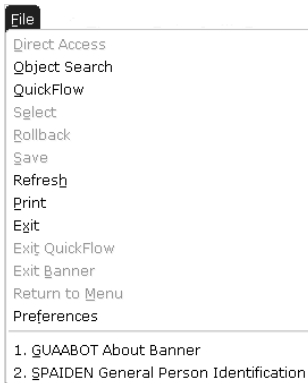
Press the underlined letter for the desired menu item.

Note: If the Options menu contains multiple menu items that begin with the same letter, you must use the up and down arrow keys to select the desired menu item.

File Menu

This pull-down menu contains standard Banner and Oracle functions. The bottom of the menu lists the last forms (up to ten) you accessed in this session. You can select any form in this list to re-access it.

Some of the menu items let you call another form, job, or QuickFlow. When you exit the called object, you return to the object you were previously using.



Direct Access	Displays the Direct Access Form (GUAPARM), which is used to access a form by its name. See "Direct Access" in chapter 3.
Object Search	Displays the Object Search Form (GUIOBS), which is used to search for a menu, form, job, or QuickFlow with part of the name, description, or type. See "Object Search" in chapter 3.
QuickFlow	Displays the QuickFlow Form (GUAQFLW), which is used to access a QuickFlow. See "QuickFlow" in chapter 3.
Select	Returns you to the calling form and enters the selected value into the field that called the form.
Rollback	<p><i>Application and inquiry forms</i> Clears all information (except key information) and returns you to the first enterable field in the key block.</p> <p><i>Validation forms</i> Returns you to the first enterable field on the form.</p> <p><i>Query forms</i> Returns you to the first enterable field on the calling form.</p>
Save	Saves all changes entered since the last time you saved.
Refresh	Clears the message line.
Print	Prints the current window with the date and time in the title bar.
Exit	<p><i>Forms and windows</i> Exits you from the form or window.</p> <p><i>Main menu</i> Exits you from Banner.</p> <p><i>Query mode</i> Cancels the query and takes the form out of query mode.</p>
Exit QuickFlow	Exits you from a QuickFlow.

Preferences	Displays the General User Preferences Maintenance Form (GUAUPRF), which is used to customize Banner for individual users. See "Title Bar Display Options," "Displayed Form Names," and "Customized Main Menu," all in chapter 5, <i>Customization</i> .
Banner XtenderSolutions	If Banner® XtenderSolutions™ ^a is installed, displays a list of documents that match the query criteria for the current cursor location.
Banner XtenderSolutions-Info	If Banner® XtenderSolutions™ is installed, displays the number of documents that match the query criteria for the current cursor location.
List of recently accessed forms	Lets you quickly re-access forms that were previously accessed in this session (up to ten). See "Last 10 Forms in the File Pull-Down Menu" in chapter 3.

a.XtenderSolutions is a trademark of Legato Systems, Inc.

Edit Menu

This pull-down menu contains the functions used to edit text items.



Cut	Cuts selected text and places it on the clipboard.
Copy	Copies selected text to the clipboard.
Paste	Pastes text from the clipboard to the spot where the cursor is located.
Edit	Displays the Editor window, which is used to enter or update text. You can display this window from most fields. It is particularly useful in long data fields. See "Using the Editor" in chapter 4.

Options Menu

This pull-down menu contains navigation options.

Navigation options vary from form to form and depend on where the cursor is currently located. Some options take you to other blocks and windows within the current form. Other options take you outside the current form to related forms. For options that take you outside the current form, you can optionally display the form

name associated with the option. You can set up this display option on the General User Preferences Maintenance Form (GUAUPRF). See "Displayed Form Names" in chapter 5.

Banner is delivered with standard navigation options. Your system administrator can use the Options Maintenance Form (GUAOPTM) to change and add navigation options for your institution. Only those staff members with appropriate security can perform this task.

Note: Only the first 24 options defined on GUAOPTM will appear in the Options pull-down menu.

Block Menu

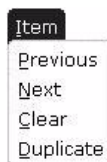
This pull-down menu contains the functions used to navigate among the blocks of information on a form.



Previous	Moves the cursor to the previous block that has at least one enterable field. If the previous block is in another window, that window is opened.
Next	Moves the cursor to the next block that has at least one enterable field. If the next area is in another window, that window is opened.
Clear	Clears all information from the current block. (Information is not removed from any records or tables.)

Item Menu

This pull-down menu contains the functions used to navigate among the fields or items on a form.

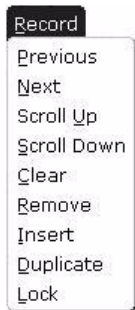


Previous	Moves the cursor to the previous enterable field (item) in the current block.
Next	Moves the cursor to the next enterable field (item) in the current block. Occasionally, Next Item moves the cursor to the first enterable field (item) in the next block.
Clear	Clears all information from the current field (item). (Information is not removed from any records or tables.)

Duplicate	In a blank row of a repeating record, duplicates the contents of the same field (item) in the previous record and copies it into the new record.
-----------	--

Record Menu

This pull-down menu contains the functions used to work with records on a form.



Previous	Moves the cursor to the first enterable field in the previous record and triggers previous record logic coded into the form.
Next	Moves the cursor to the first enterable field in the next record of the current block and triggers next record logic coded into the form. If the cursor is in the last record, a new record is created.
Scroll Up	Scrolls up the list of repeating records, putting the first displayed record near the bottom of the list.
Scroll Down	Scrolls down the list of repeating records, putting the last displayed record near the top of the list.
Clear	Clears all information from the current record. (Information is not removed from any records or tables.)
Remove	Removes all information for the current record. When you Save, the removed information is deleted.
Insert	Inserts a new blank record into the list of existing records.
Duplicate	Duplicates the contents of all fields in the record and copies them into a new record.
Lock	Temporarily locks the contents of the record so no other Banner user can update it. Save, Rollback, and Exit release the lock.

Query Menu

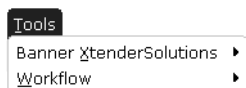
This pull-down menu contains the functions used to query information in the database based on specified criteria. See "Querying Information" in chapter 3.



Enter	Puts the form into query mode so you can enter search criteria to see what information is already in the database.
Execute	Searches the database and displays the first set of records that match your search criteria.
Last Criteria	Enters the criteria from your last search.
Cancel	Cancels the query and takes the form out of query mode.
Count Hits	Counts the number of records that match the search criteria and displays that number in the auto hint.
Fetch Next Set	If more records match the search criteria than fit in the window, replaces the current set of displayed records with the next set.

Tools Menu

This pull-down menu contains actions that can be performed with Banner Xtender Solutions as well as options to submit or release a Workflow. Refer to the documentation for Banner Xtender Solutions or Workflow for more information about these options.



Banner Xtender Solutions	Puts the form into query mode so you can enter search criteria to see what information is already in the database.
Workflow	Searches the database and displays the first set of records that match your search criteria.

Help Menu

This pull-down menu contains various help tools.



Online Help	Displays online information for the current form. See "Online Help" in chapter 4.
Dynamic Help Query	Displays the Dynamic Help Form (GUAHELP) in query mode, which is used to display traditional help for a field, block, or form. See "Dynamic Help" in chapter 4.
Dynamic Help Edit	Displays the Dynamic Help Form (GUAHELP) in edit mode, which is used to edit traditional help for a field, block, or form. Use this feature to maintain custom information at your institution. See "Dynamic Help" in chapter 4.
Help (Item Properties)	Displays the Oracle item properties window for the current field. See "Help (Item Properties)" in chapter 4.
Show Keys	Displays the Keys list, which lists the functions and their equivalent keystrokes available in your environment for the current form, window, and field. See "Show Keys" in chapter 4.
List	Displays the List of Values (LOV) for the current field if List of Values appears in the status line. See "Entering Information Into Validated Fields" in chapter 3.
Display Error	If an Oracle error occurs, displays the code that is in error.
Display ID Image	If the cursor is in an ID field, displays the image associated with the ID, if available.
Calendar	Displays the calendar. See "Using the Calendar" in chapter 4.
Calculator	Displays the calculator. See "Using the Calculator" in chapter 4.
Extract Data with Key	Extracts Banner data for the current block, with key data, to a spreadsheet. See "Extracting Banner Data to a Spreadsheet" in chapter 3.
Extract Data No Key	Extracts Banner data for the current block, without key data, to a spreadsheet. See "Extracting Banner Data to a Spreadsheet" in chapter 3.
Technical Support	This sub-menu provides access to SQL Trace, optimization mode, and database reconnection features.

Turn SQL Trace On	Turns the SQL Trace feature on. SQL Trace is a tool that helps your technical support staff track performance issues that need to be resolved. Refer to the <i>Banner General Technical Reference Manual</i> .
-------------------	--

Turn SQL Trace Off	Turns the SQL Trace feature off. SQL Trace is a tool that helps your technical support staff track performance issues that need to be resolved. Refer to the <i>Banner General Technical Reference Manual</i> .
--------------------	---

Set Query Optimizer to All Rows	This cost-based optimization mode is recommended for testing batch processing. Rather than immediately populating the cursor, this option optimizes the query to get the best time for the entire results set to be displayed. Because of this, it is a good option for batch processing rather than online processing.
---------------------------------	---

Note: You must be connected to an Oracle10g database in order to use this option.

Warning: Changing optimization modes mid-session may cause your results to be invalid due to cached data from previous queries. SunGard Higher Education recommends that you exit and re-enter Banner if want to change optimization modes.

Set Query Optimizer to First Rows	This cost-based optimization mode optimizes the query to get the first set of rows as quickly as possible. It is useful for online processing. DBAs can configure how many rows will be defined as the “first rows,” for example, 1,100, 1000.
-----------------------------------	--

Note: You must be connected to an Oracle10g database in order to use this option.

Warning: Changing optimization modes mid-session may cause your results to be invalid due to cached data from previous queries. SunGard Higher Education recommends that you exit and re-enter Banner if want to change optimization modes.

Set Query Optimizer to Rule	This standard rule-based mode is based on sql and database schema, and optimization is based on Oracle rules in the database (for example, if an index is present, then use it). It does not optimize queries, but rather executes them based on a series of Oracle rules.
-----------------------------------	--

Note: You must be connected to an Oracle10g database in order to use this option.

Warning: Changing optimization modes mid-session may cause your results to be invalid due to cached data from previous queries. SunGard Higher Education recommends that you exit and re-enter Banner if want to change optimization modes.

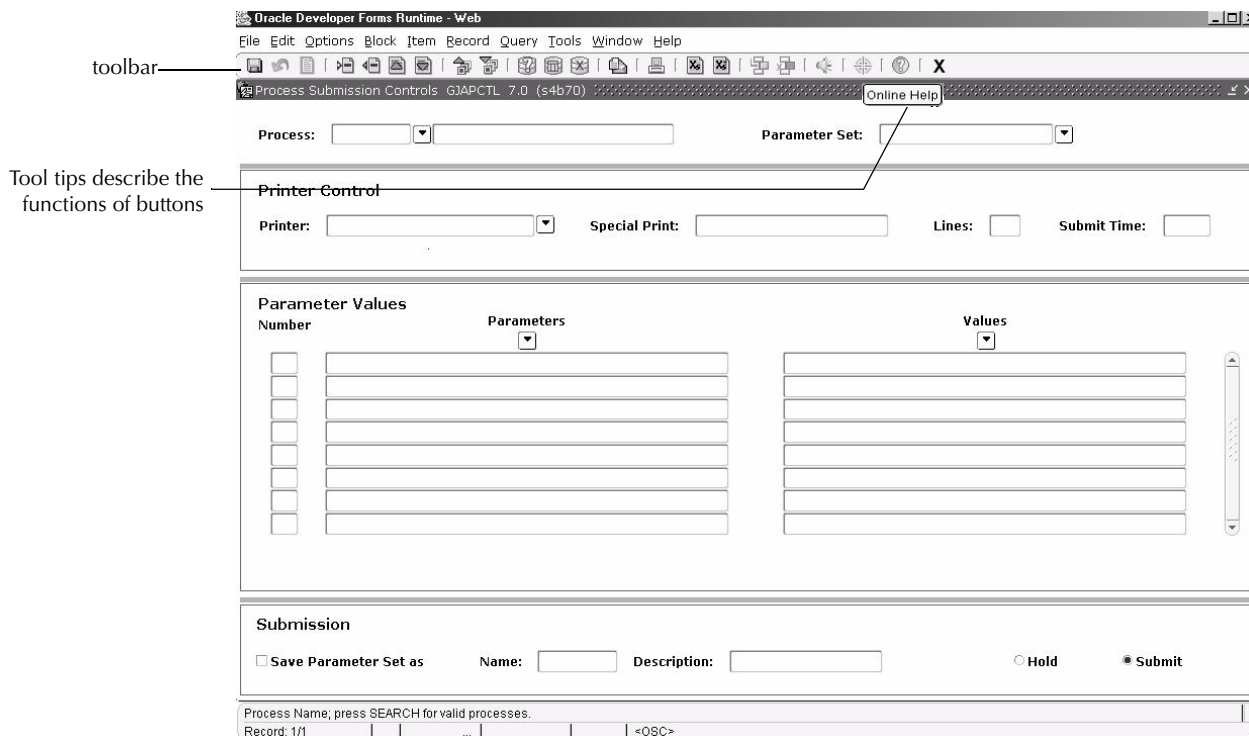
Reconnect to Database	Reconnects to the database.
--------------------------	-----------------------------

About Banner	Displays the About Banner Form (GUAABOT), which identifies the current form, release number, date, and time, as well as all legal statements and copyright information for Banner.
-----------------	--

This form also displays a list of installed Banner products, their release number, and their installation date. This information will be helpful if you need to contact the ActionLine with a question or problem.

Toolbars

The Banner toolbar contains buttons that perform common functions. It is located directly under the menu bar:



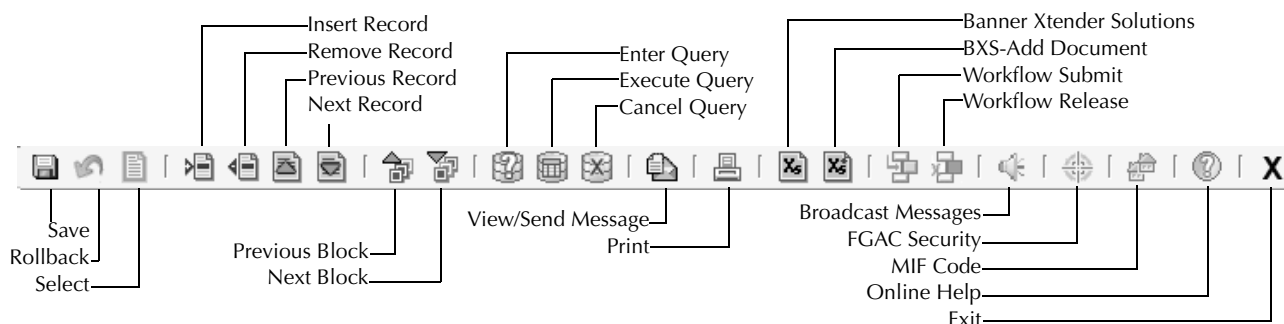
When you move your cursor over a button and pause, a tool tip appears with text that describes the function of the button.

To access a toolbar button:

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

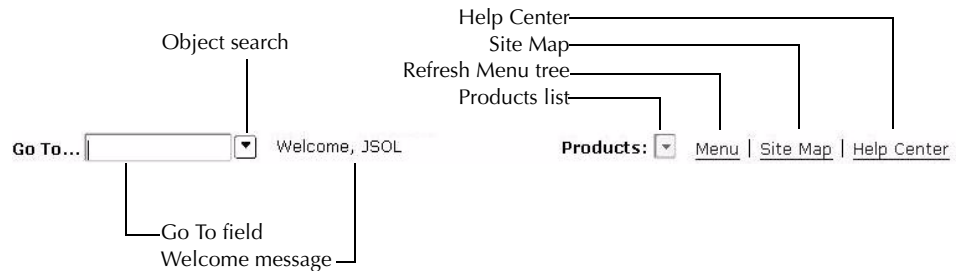
Standard Buttons

Standard buttons are delivered on the toolbar:



Links on the Main Menu

In addition to the toolbar buttons, several links are available from the main menu. Information about using these links is located in chapter 3, *Getting Around Banner*.

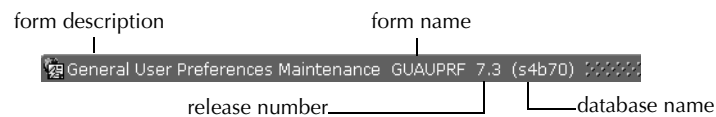


Title Bar

The title bar shows the following information:

- Descriptive form name
- Form name (seven or eight characters)
- Release number
- Database name from the Installation Control Form (GUAINST)

Individual users can remove any of this information except the descriptive form name. See "Title Bar Display Options" in chapter 5.



Blocks

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

key block

other blocks

Object: RECR_MAJR

Description: Recruit Major

** Press NEXT BLOCK to edit Object Rules, CLEAR BLOCK to delete Object **

Rules

('	Data Element	Operator	Value)	AND / OR
	SRBRECR_MAJR_CODE	=	&recr_majr		

Object Description:

Most blocks have a title. There are three exceptions:

- A key block does not have a title.
- If a form or window has only one block, the block does not have a title.
- If a form has a key block and only one other block, the second block does not have a title.

Key Block

The first block on most forms contains key information. (Some forms, especially validation forms and certain list forms, do not have a 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.

The key block has at least one field and sometimes more. For example, a form that maintains population selection information may have key block fields for both an application and a selection ID.

The key block stays on the form as subsequent blocks appear. Occasionally, another window may appear on top of the key block if the window is unusually large or if the key block is not pertinent to the window.

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.

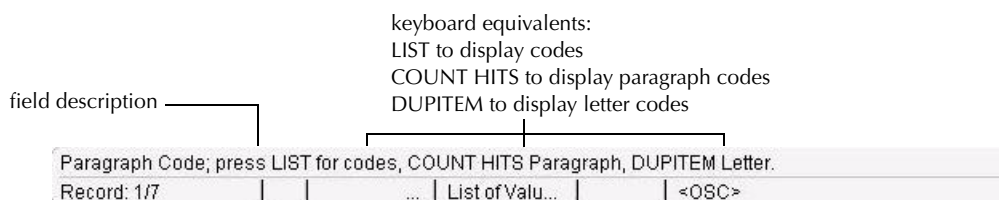
Other Blocks

Other blocks contain additional details for the key information. Each block contains related information and is usually enclosed in a beveled box.

Auto Hint

The auto hint at the bottom of the form can contain the following information for the field where the cursor is located:

- Brief field description
- Error and processing messages
- Keyboard equivalents, if you can access other blocks, windows, or forms from the field



Status Line

The status line directly under the auto hint can contain one or more of the following messages:

- Record n/n** Shows the number of the current record followed by the total number of records in the current block. If there are more records than fit in the window, the total appears as a question mark (for example, 3/?) until you scroll to the last record in the block. Once the last record is displayed, the total appears as a number (for example, 3/15).
- List of Values** Indicates the field has a List of Values; see "Entering Information Into Validated Fields" in chapter 3.

Enter Query Indicates the form is in query mode.

status line — Event type code; press LIST for valid codes.
Record: 1/1 List of Values <OSC> <DBG>

Elements on a Form

The following figure shows various elements that appear on forms. Each element is described on the following pages.

The screenshot shows the GUAMESG 7.0 (s4b70) form interface. The menu bar includes File, Edit, Options, Block, Item, Record, Query, Tools, Window, and Help. The toolbar contains various icons for file operations and editing. The form itself is divided into several sections. The top section is labeled 'buttons' and includes fields for Recipient, Message, Reference ID, System, Sender, Date, Source, Time, and Item. Below this is a section labeled 'radio buttons' with radio buttons for Complete, Pending, Hold, and Confidential. The next section is labeled 'fields' and includes fields for Recipient, Message, Reference ID, System, Sender, Date, Source, Time, and Item. The bottom section is labeled 'checkbox' and includes checkboxes for Complete, Pending, Hold, and Confidential. The entire form is labeled 'record'.

Buttons

Buttons are visual images used to perform an action or respond to the system. Banner forms use iconic buttons and response buttons.

Iconic Buttons

These buttons are small squares that contain an icon (picture). They represent one or more actions that can be performed for the associated field or record. For example, you can use iconic buttons to display a validation form for the field, copy a record, or display a window for entering freeform text.

Banner forms use the following buttons. (Some products do not use all buttons.)



Search

Displays another form or window where you can search for a value or information related to the field. You can often select and return a value to the associated field.

Note: Sometimes the Search button can perform more than one function. In these cases, an Option List appears. You can select an option from the list using your mouse, or you can tab among the choices and use the Enter key or space bar to make your selection.



Calendar

Displays a calendar so that you can choose a date.



Data

Indicates that data is available for the associated field.



No Data

Indicates that no data is available for the associated field.



Summary

Displays summary information for the associated record.



Details

Displays details for the associated record.



In Process

Indicates the process has started but is not complete.



Complete

Indicates the process is complete.



Maintenance

Updates information in the database.



Copy

Copies the current record or records.



Comments

Displays a window where you can enter freeform text for the associated record.



Calculate

Performs a calculation on data in the associated field.



Approve

Indicates the process is approved.



Disapprove

Indicates the process is not approved.



Generate ID

Generates a new ID.

If a field has an iconic button, the auto hint identifies the equivalent function that can be used instead of the button. If the button can perform more than one function, each equivalent is identified in the auto hint.

To select an iconic button:



1. Click the button.
 2. If an Option List appears, click the desired option.
- Otherwise, the form or window appears automatically.



1. Select the Next Item function until you reach the field that has the button.
2. Read the auto hint and select the equivalent function. (A field may have more than one option.)

Response Buttons



These buttons are shaded rectangles that appear in alert boxes and dialog boxes. An alert box has one response button. A dialog box has two or more response buttons. You must use the buttons to respond to the system before you can continue.

To select a response button in an alert box:



Click the OK button.



Press Enter.

To select a response button in a dialog box:



Click the desired button.



Select the Next Item function or use the left and right arrow keys to move to the desired button. Then press Enter.

OR

Press the underlined letter on the desired button.

Check Boxes

Selected:

☒ More Detail?

Not selected:

☐ More Detail?

Check boxes are small boxes used to enable or disable features or options. When an option is enabled, a check mark appears in the check box. When the option is disabled, the check box is empty.

Check boxes often represent yes/no conditions. For example, the first sample on the left indicates the record has more detail. The second sample indicates the record does not have more detail. Sometimes check boxes indicate navigation to other windows. The auto hint tells you when a check box is used for this kind of navigation.

To select or clear a check box:



Click the check box. If the box was unchecked, it is now checked. If the box was checked, it is now unchecked.

1. Select the Next Item function to move to the check box.
2. Press the space bar. If the box was unchecked, it is now checked. If the box was checked, it is now unchecked.

Note: If the space bar does not toggle a check box, it may not be defined on your system. Check with your data center personnel.

Radio Buttons

- ☐ Invitee
- ☐ Guest
- ☒ Both

Radio buttons are small circles used to select one of several options in a group. Each radio button represents a choice for the group. You can pick only one radio button in a group. When you select a radio button, the previously selected button is cleared. In the sample on the left, the Both button is selected.

To select a radio button:



Click the radio button.

1. Select the Next Item function to move to the radio group.
2. Press the left or right arrow key to move to the desired radio button.

Scroll Bars



Scroll bars are used to display overflow information when a form has more information than can be displayed at once. They also indicate that a form has an unlimited number of repeating records.

A scroll bar has an arrow on each end and a scroll box in the middle. The position of the scroll box shows approximately how far you are from the top/bottom or the right/left side of the window.

Forms can have two kinds of scroll bars:

- A **vertical** scroll bar, located directly to the right of the rows, indicates there are more records than are shown. A record can have one or more fields and one or more lines. A vertical scroll bar is disabled if all the records appear at once.
- A **horizontal** scroll bar, located directly under the window, indicates there are more columns of information than are shown.

To use a scroll bar:



Click and drag the scroll box up/down (vertical) or left/right (horizontal).

OR

Click the arrow at either end of the scroll bar. The scroll box moves in the direction of the arrow.

OR

Click anywhere in the scroll bar. The scroll box moves between the previous location and where you click.



1. Select the Next Item function to move to one of the fields controlled by the scroll bar.

2. To move up and down (vertical scroll bar), select the Next Record or Previous Record function.

OR

To move left and right (horizontal scroll bar), select the Next Item or Previous Item function.

Fields

Fields are areas on a form where you can enter, query, change, and display specific information. A field is sometimes called an item. This is the case in the names of the functions *Next Item*, *Previous Item*, and *Duplicate Item*. The following terms describe a field:

Date: 
Source:
Item:

- **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 black text, the same as enabled fields. Your site administrator may choose to change the color of disabled text for your site. Refer to the *Banner Middle Tier Implementation Guide* for more information.
- **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.

Some fields are usually enabled but may be disabled occasionally. For example, in query mode sometimes you cannot query a field that is normally enabled, and sometimes you can query a field that is normally disabled. This is also true for enabled fields in a key block; once you leave the key block, all fields in the key block are disabled.

Text fields may appear to be a few characters longer than they actually are. For example, a field that allows up to 60 characters may look like it still has space after the sixtieth character. This is because each character uses a different amount of space.

To access an enterable field:



Click the field.



Select the Next Item function until the cursor is in the field.

Records, Rows, and Columns

A record is a set of related fields. For example, a street, city, state, and ZIP/postal code form an address record.

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 don't fit into the window at once. A vertical scroll bar appears on the right side of the rows if all rows don't fit into the window at once. When you select a row, the entire record is highlighted to identify it as the current record.

This sample shows a form with multiple printer records:

The current record is highlighted.

Code	Description	Command	Printer Port	Landscape Codes	Portrait Codes	Activity Date
//sctmnt20/SES_D	3CV 3rd Floor East Wing Develo	print /queue=ses_de				03-DEC-2004
JAN	Jan's Schedules	echo "Hello"				07-FEB-2005
LPA1:	Lpa1					14-MAR-1995
LPB5:	lpb5					14-MAR-1995
NONE	None					14-MAR-1995
NOPRINT	Don't Print					26-NOV-2003
SCHED	Student Schedules	enscript -Pses_dev_				06-FEB-2005
SES_DEV_8150	3CV 3rd Floor East Wing Develo	lp -d ses_dev_8150				13-DEC-2004
SES_PCAM_8100	BY CYNDY	lpr -S 149.24.35.22				02-DEC-2004
local1	Local RS6000 - Malvern					11-NOV-1993
local2	Local RS6000 - Irvine					11-NOV-1993
none	none					14-MAR-1995
sctmnt20:ses_dev_	3cv third floor rm 331					13-DEC-2004
sctrta1	Rochester West Wing Talaris	print /queue=sctrta1				08-NOV-1995
tal1	Talaris Printer 1 - Malvern					11-NOV-1993
tal2	Talaris Printer 2 - Malvern					11-NOV-1993
tal3	Talaris Printer 3 - Reston					11-NOV-1993

Pull-Down Lists

None
Other Protected Veteran Only
Vietnam Veteran Only
Both Vietnam/Other Eligibl. Vet

Pull-down lists are used to select a field value from a list of pre-defined values. A down arrow in the right side of the field indicates the field has a pull-down list.

Note: Fields with a Search button have a similar-looking down arrow. Pull-down lists have the arrow *inside* the field, while the Search button is located *outside* the field.

To select a value from a pull-down list:



1. Click the field. The entire pull-down list appears with the currently selected item highlighted.
2. Click the desired item. The selected value appears in the field.



1. Select the Next Item function to move to the pull-down list.
2. Press the Alt and down arrow keys simultaneously to display the entire pull-down list with the currently selected item highlighted.

OR

Press the down arrow key to scroll through the list items one at a time.

3. Use the arrow keys to move to the desired item.

OR

Type a character to highlight the next item that begins with that character. For example, to choose *Inactive*, type *I*. If more than one item starts with *I*, then the first item that starts with *I* is selected. Continue to press *I* until the correct choice appears.

4. Press Enter. The selected value appears in the field.

Oracle Functions Used in Banner

Oracle functions trigger actions within a form. The following list describes the Oracle functions commonly used in Banner. For more complete technical descriptions, refer to your Oracle documentation.

Note: Banner sometimes redefines the standard Oracle functions to perform other functions. For example, Count Query Hits often calls another form. Use the Show Keys function to list the functions defined for the current form, window, or field.

Cancel	Exits you from an Option List, List of Values, Editor window, or Dynamic Help without making a selection or saving information.
Clear Form	See <i>Rollback</i> .
Commit	See <i>Save</i> .
Count Hits	See <i>Count Query Hits</i> .
Count Query Hits	<p>In query mode, counts the number of records that match the search criteria and displays that number in the auto hint. To retrieve records, select the Execute Query function.</p> <p>Also referred to as <i>Count Hits</i>.</p>
Down (arrow key)	<p>Moves the cursor to the first enterable field in the next record, moves you lower in a List of Values, or moves you lower in a pull-down list.</p> <p>Down is similar to Next Record without next record logic.</p>
Edit	Displays the Editor window, which is used to enter or update text. It is particularly useful in long data fields.
Enter Query	<p>Puts the form into query mode so you can enter search criteria to see what information is already in the database.</p> <p>Enter Query appears in the status line. For more information, see "Querying Information" in chapter 3.</p>
Execute Query	In query mode, searches the database and displays all records that match your search criteria. For more information, see "Querying Information" in chapter 3.
Exit	<p><i>Forms and windows</i></p> <p>Exits you from the form or window.</p> <p><i>Main menu</i></p> <p>Exits you from Banner.</p> <p><i>Query mode</i></p> <p>Cancels the query and takes the form out of query mode.</p> <p>Also referred to as <i>Exit without Value</i>.</p>

Exit with Value	<p><i>Called form</i></p> <p>Returns you to the calling form and enters the selected value into the field that called the form.</p> <p><i>List of Values (LOV)</i></p> <p>Returns you to the calling form and enters the highlighted value into the field that called the form. The OK button corresponds to Exit with Value.</p> <p>Also referred to as <i>Select</i> and <i>Next Primary Key</i>.</p>
Exit without Value	See <i>Exit</i> .
Help	Displays the Oracle item properties window for the current field.
List	Displays the List of Values (LOV) for the current field if List of Values appears in the status line.
Next Block	Moves the cursor to the next block that has at least one enterable field. If the next area is in another window, that window is opened.
Next Field	See <i>Next Item</i> .
Next Item	<p>Moves the cursor to the next enterable field in the current block. Occasionally, Next Item moves the cursor to the first enterable field in the next block.</p> <p>Also referred to as <i>Next Field</i>.</p>
Next Primary Key	See <i>Exit with Value</i> .
Next Record	<p>Moves the cursor to the first enterable field in the next record of the current block and triggers next record logic coded into the form. If the cursor is in the last record, a new record is created.</p> <p>Next Record is similar to Down with the addition of next record logic.</p>
Previous Block	Moves the cursor to the previous block that has at least one enterable field. If the previous block is in another window, that window is opened.
Previous Field	See <i>Previous Item</i> .

Previous Item	<p>Moves the cursor to the previous enterable field in the current block.</p> <p>Also referred to as <i>Previous Field</i>.</p>
Previous Record	<p>Moves the cursor to the first enterable field in the previous record and triggers any previous record logic coded into the form.</p> <p>Previous Record is similar to Up with the addition of previous record logic.</p>
Rollback	<p><i>Application and inquiry forms</i> 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 roll back, you are prompted to save.</p> <p><i>Validation forms</i> Returns you to the first enterable field on the form.</p> <p><i>Query forms</i> Returns you to the first enterable field on the calling form.</p> <p>Also referred to as <i>Clear Form</i>.</p>
Save	<p>Saves all changes entered since the last time you saved.</p> <p>Also referred to as <i>Commit</i>.</p>
Scroll Down	<p>Scrolls down the list of multiple records, putting the last displayed record near the top of the list.</p>
Scroll Up	<p>Scrolls up the list of multiple records, putting the first displayed record near the bottom of the list.</p>
Select	<p>See <i>Exit with Value</i>.</p>
Show Keys	<p>Displays the Keys list, which lists the functions and their equivalent keystrokes available in your environment for the current form, window, and field.</p>
Up (arrow key)	<p>Moves the cursor to the first enterable field in the previous record, moves you higher in a List of Values, or moves you higher in a pull-down list.</p> <p>Up is similar to Previous Record without previous record logic.</p>

Chapter 3 Getting Around Banner

Banner provides numerous ways to navigate through the system:

Main menu	You can select from a list of the menus, forms, jobs, and QuickFlows in Banner.
Direct Access	You can access a menu, form, job, or QuickFlow by its name.
Object Search	You can access a form, job, or QuickFlow if you know part of its name, description, or type.
Site map	You can view a list of the top-level menus and one level below them.
Tabs	You can access windows on tabbed forms by selecting the tab.
Options menu	You can access other forms, windows, and blocks related to the current form, window, and block.
Option list	You can right-click on a form anywhere outside a field to display the Option list, from which you can perform functions, navigate to other parts of the form, or add the form to your personal menu.
Buttons	You can access another form or window related to the current record or field.
Mouse	You can click an iconic button, field, record, block, or window that is currently displayed.
Keyboard equivalents	You can use the keyboard to access a form, window, block, or field.
QuickFlow	You can automatically access forms that are linked in a chain.
Last 10 forms in the File pull-down menu	You can quickly re-access a form that was previously opened in the current session.

Display Navigation Window key	You can press this key on any form to display a navigation window that enables you to enter the name of another form or job and navigate to it.
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Main Menu

You can use the main menu to select from a list of the menus, forms, jobs, and QuickFlows in Banner. The main menu shows the various levels of menus at your institution. These levels are nested within a hierarchical folder structure. You can easily navigate through Banner by expanding and collapsing these menus. Once you have “drilled down” to the item you want, you can click its link to access it.

Refer to chapter 2 for more information about the main menu.

To expand or collapse a menu:

Select the folder (or its associated description) to expand the menu so you can see the objects it contains. Select the folder again to collapse it.

To access a menu item:

1. Expand the menu you want to start with (for example, *General*).
2. Continue expanding menus until you drill down to the form, job, or QuickFlow you want.
3. Double-click the name of the form, job, or QuickFlow you want to access.

Direct Access

You can use Direct Access to access a menu, form, job, or QuickFlow by its name. You can use Direct Access from the main menu or from a form.

To use Direct Access from the main menu:

1. Enter the name of the menu, form, job, or QuickFlow in the **Go To** field.
2. Press Enter.

Note: You cannot search for an object using code/description lookup in this field. You can, however, search by selecting the Search button and then performing your search on GUIOBS.

To use Direct Access from a form:

Note: When you use Direct Access from a form, the current form remains open. When you exit the requested form, job, or QuickFlow, you return to the original form.

1. Select File>Direct Access. The Direct Access Form (GUAPARM) appears.
2. Enter the name of the form, job, or QuickFlow in the **Enter Valid Name** field. (You cannot use Direct Access to access a menu from a form.)
3. Click the Start button or press Enter.

Object Search

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

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

Note: You cannot search for an object using code/description lookup in this field. You can, however, search by selecting the Search button and then performing your search on GUIOBJJS.

To use Object Search:

1. Double-click the **Go To** field on the main menu. You can also use the Search button.

OR

Select File>Object Search from any form.

OR

Select Help>List on the **Object** field on menu maintenance forms. Make sure your cursor is in the **Object** field for the menu you are building, and not for the list of all objects that you pick from.

2. Enter your search criteria on the Object Search Form (GUIOBJJS).

You can use any or all of the **Name**, **Description**, and **Type** fields. You can use the Oracle wildcards % and _ . (See "Wildcards" in this chapter.)

3. Select the Execute Query function. A list of all matches appears.
4. Scroll to the desired name.
5. Double-click the desired name or click the Start button.

Note: You can use the up and down arrow keys within the **Go To** field to scroll through forms that you have previously accessed in the Banner session. Press Enter to go to that form.

Site Map

The site map appears on a separate page accessible by selecting the Site Map link on the main menu. It lists the top-level menus in your installation, and one level below them. There are no fields on it, only links to the various menus and forms.

My Banner Empty; Select to build.	Advancement Advancement Individual Advancement Organization Membership Prospect Management Designation Solicitor Organization Campaign Pledge Gift and Pledge Payment Event Management Advancement QuickFlow Advancement Self-Service External Data Load and Extract	Human Resources Applicant Administration Electronic Approvals Biographic/Demographic Inform Employment Administration Compensation Administration Employee Relations Administrati Health and Safety Administratio Benefit / Deduction Administrati Position Management Personnel Services Budget Time Entry and Payroll Processin Payroll History Human Resources Administration Security Set up Committee/Service	General Job Submission Population Selection Letter Generation General International Managemen System Functions/Administration Event Management General Web Management General Voice Response Manage Banner XtenderSolutions BXS FinAid Requirements Linking BXS Student Requirements Linki BXS Student Requirements Linki BXS Application Validation Form BXS Document Type Validation F BXS Context Determination Form BXS System Settings Form BXS Error/Result Form
Student Course Catalog Class Schedule General Person Faculty Load Location Management and Housi Recruitment Admissions & Stuff General Student Registration Accounts Receivable Academic History Curriculum, Advising and Progra Student System Management Student Administration Information Access	Finance General Ledger Finance Operations Stores Inventory Purchasing and Procurement Accounts Payable Budget and Position Control Fixed Asset Cost Accounting Endowment Management Investment Management Accounts Receivable Research Accounting	Financial Aid Applicant Processing Need Analysis Requirements Tracking Budgeting Packaging and Disbursement Funds Management Electronic Data Exchange History and Transcripts Financial Aid Common Functions Student System Shared Data	Business Processes Manage the Enterprise Matriculate to Educate Forecast to Enroll Plan to Fund

Banner Broadcast Messages

If you select a menu from the site map, the main menu appears, displaying the menu you selected with one level expanded. If you select a form, a process, or a QuickFlow, it will be displayed.

Tabs

Certain forms feature a tabbed interface. Tabs are used to arrange information in a meaningful way, and allow you to navigate easily between groups or blocks of information. Tab titles reflect the contents of a particular window or grouping of information.

For tabbed forms that contain windows of parent/child information, the main (“parent”) tab appears in the top row. The dependent (“child”) information appears on tabs lower on the window and below the top-level tab to which the information is related.

To navigate between tabbed windows:



- Click the tab.
- The List Tab Pages key (F2) displays a list of other tabbed windows on the form. Use the mouse to select a different tab from the list. For forms that have tabs within a tabbed window, navigation is based on the location of the cursor when List Tab Pages is selected.
- Control-Tab moves forward and Control-Shift-Tab moves backward through the tabs on a form.
- Control-Page Up moves forward and Control-Page Down moves backward through the tabs.
- The List Tab Pages key (F2) displays a list of other tabbed windows on the form. Use the up and down arrow keys to select a different tab from the list. For forms that have tabs within a tabbed window, navigation is based on the location of the cursor when List Tab Pages is selected.

Options Menu

You can use the Options menu in the menu bar to navigate within Banner. Options in the menu depend on where the cursor is currently located. Some options take you to other blocks and windows within the current form. Other options take you outside the current form to other related forms.

The Options menu optionally displays the form name associated with each option that takes you outside the current form. You can set up this option on the General User Preferences Maintenance Form (GUAUPRF). See "Displayed Form Names" in chapter 5.

Banner is delivered with standard navigation options. The system administrator at your institution can use the Options Maintenance Form (GUAOPTM) to change and add navigation options for your institution. Only those staff members with appropriate security can perform this task.

Note: Only the first 24 options defined on GUAOPTM will appear in the Options pull-down menu.

To select an option in the Options menu:



1. Click the Options menu.
Navigation options appear.
2. Click the desired navigation option.



1. Press the Alt key. The cursor moves to the menu bar.
2. Use the right arrow key to highlight the Options menu. Then press Enter.

OR

Press the letter *O* on your keyboard.
Navigation options appear.

3. Use the up and down arrow keys to highlight the desired navigation option. Then press Enter.

OR

Press the underlined letter for the desired navigation option.

Note: If the Options menu contains multiple menu items that begin with the same letter, you must use the up and down arrow keys to select the desired menu item.

Option Window

When you right-click anywhere on a form (except from within a field), the pop-up Option window appears. It contains different options related to the form, such as functions you can perform and navigation options. You can also choose to add the form to your personal menu.

Note: To see the form that you just added to your personal menu via the Option window, you must first refresh the menu by either clicking the Menu link on GUAGMNU or entering *REFRESH* in the **Go To** field.



The Option window displays a list of form-specific options..

To select an option in the Option window:



1. Right-click on the form (but not from within a field). The Option window appears.
2. Click the desired option.



Note: There is no keyboard equivalent for the Option window; however, most options are available from either the File or Options pull-down menu.

1. Press the Alt key. The cursor moves to the menu bar.
2. Use the right arrow key to highlight the File or Options menu. Press Enter.

OR

Press the letter *F* or *O* on your keyboard. Options appear.

3. Use the up and down arrow keys to highlight the desired option. Then press Enter.

OR

Press the underlined letter for the desired option.

Note: If the Options menu contains multiple menu items that begin with the same letter, you must use the up and down arrow keys to select the desired menu item.

Iconic Buttons

You can use iconic buttons to access a form or window related to the record or field where the cursor is currently located. See "Iconic Buttons" in chapter 2 for a more detailed description of iconic buttons.

To select an iconic button:



1. Click the button.
2. If an Option List appears, click the desired option.

Otherwise, the form or window appears automatically.



1. Select the Next Item function until you reach the field that has the button.
2. Read the auto hint and select the equivalent function. (A field may have more than one option.)

Mouse

You can use the mouse to navigate to an enterable field, record, block, or window that is currently displayed. You can access fields in any order. You can also use the mouse to click buttons.

Keyboard Equivalents

You can use the keyboard equivalents of Oracle functions to access a form, window, block, or field.

To access a form with keyboard equivalents:

1. Read the auto hint message to determine whether a redefined Oracle function lets you navigate to another form. (Count Query Hits, Duplicate Item, Duplicate Record, Exit with Value, and List are the most commonly redefined functions.)
2. If a redefined function is available, use Show Keys to find the keyboard equivalent for the redefined function.
3. Use the keyboard equivalent to access the form.

To access a window or block with keyboard equivalents:

Use the keyboard equivalents for Next Block and Previous Block to move among blocks. If the next/previous block is in another window, these keys take you to another window.

Note: Occasionally the Next Block function appears to move the cursor to another enterable field in the same block. In these cases, there are actually two blocks that visually appear to be one block.

To access a field with keyboard equivalents:

Use the Tab key (Next Item) and Shift+Tab keys (Previous Item) to move among fields. You must move in the specific order coded into the form. If a field has the Autoskip feature, the cursor automatically moves to the next field as soon as you enter the required number of characters.

QuickFlow

You can use a QuickFlow to automatically access forms that are linked in a chain. Activating a QuickFlow opens the first form in the chain. When you exit that form, the next form automatically opens.

To use a QuickFlow:

1. Select File>QuickFlow or use Direct Access to display the QuickFlow Form (GUAQFLW).
2. Enter the QuickFlow code in the **Quickflow** field.
3. Click the Start button, press Enter, or select the Next Block function. The first form in the QuickFlow appears.
4. Enter data on the form.
5. Exit the form. The next form in the QuickFlow appears.
6. Repeat steps 4 and 5 for each form in the QuickFlow. After you pass through all the forms in the QuickFlow, the GUAQFLW Form reappears.

Note: If you want to exit the QuickFlow before all the forms are accessed, select File>Exit QuickFlow.

If you do not have any data to enter on a form, exit the form. If the message **DO YOU WANT TO QUIT?** appears, answer Y. (The message depends on the form.)

7. If you are finished with the QuickFlow, exit the GUAQFLW Form.

OR

If you want to execute the QuickFlow again, return to step 3.

Last 10 Forms in the File Pull-Down Menu

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

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

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

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

Display Navigation Window Key

The Display Navigation Window key displays a navigation window on the top of your screen that allows you to enter the name of a form and then navigate to it. Usually this key is F5, but your institution may use a different key.

The navigation mini-window also contains the My Institution link that appears on the main menu.

To exit the navigation window, press F5 (or equivalent at your site) again, or perform a Next Block or Previous Block function.



To use the Display Navigation Window key:

1. Press the Display Navigation Window key (F5) from any form.
2. Enter the name of the form in the **Go To** field, or use the Search button to search for the form name.
3. Press Enter.

Note: The Display Navigation Window key does not work in query mode.

Entering Information

This section tells you how to enter information on Banner forms. Recommendations for formatting data are included at the end of this section.

Entering Information Into Validated Fields

Many fields only accept codes from a defined *list of values* (LOV). Most codes and their associated descriptions in an LOV are defined on a validation form.

You can access the LOV for a **Code/Description** field by either clicking the Search button or by double-clicking in the field.

Note: If you double-click a field *other* than **Code/Description** that has a LOV, the LOV will *not* open. (You must use the Search button or keyboard equivalent.) You can use the User Preferences Form (GUAUPRF) to change the color of **Code/Description** fields to help you visually identify fields in which double-clicking invokes an LOV.

Some validation forms contain more than just the valid codes and their associated descriptions. For example, the Site Code Validation Form (STVSITE) includes address information. When an LOV is called from a specific field, only information that is relevant to the current form is displayed in the LOV.

Using the Code/Description Lookup Feature

The code/description lookup feature helps you enter information into validated fields. 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

If you look up a code/description or display the entire LOV, you can refine your search by entering search criteria or use a drill-down search.

To enter a complete code or description in a field with an LOV:

1. Enter the full code (for example, *A005*) or full description (for example, *Registration*).
2. Press Enter. The code and description appear. Depending on the field, the cursor may automatically skip to the next field.

To look up a code or description in a field with an LOV:

Note: Do not use these steps if you are in query mode. Instead, execute a normal query. See "Querying Information" in this chapter for more information.

1. Enter as much of the code or description as you know. Use the Oracle wildcard % to represent any number of unspecified characters.

Example:

Enter A % to search for all codes and descriptions that start with “A”.

Note: If there is no wildcard, the search looks for an exact match.

2. Press Enter.
 - If one match is found, the code and description are returned, and this procedure ends.
 - If more than one match is found, the Search Results window appears with all matches. Continue with step 3.
 - If no matches are found, the auto hint displays an error message. Return to step 1 to enter another code or description.
3. Scroll (if necessary) to the desired value in the Search Results window.
4. Double-click the value or press Enter. The window closes, and the selected value is returned to the code field.

Enter a partial code.
Be sure to include the
Oracle wildcard %.

Press Enter. This
window appears if
more than one match
is found.

Go to the code you
want and double-
click it.

The screenshot shows the 'Building Definition' window for 'BIOL' (Biology Building). The 'Room Rate' field is set to 'C%' and the 'Room Rate' dropdown is open, showing 'Conference-\$100 per day'. A 'Search Results' window is overlaid on the right, displaying a list of search results for 'Find Conference-%'. The results are:

Desc	Code
Conference-\$100 per day	C100
Conference-\$200 per day	C200
Conference-\$350 per day	C350

The 'C100' code is highlighted. The 'Search Results' window has 'Find', 'OK', and 'Cancel' buttons. The 'Building Definition' window has fields for Campus, Site, Capacity, College, Department, Partition, Room Rate, Phone Rate, Street Line 1, Street Line 2, Street Line 3, City, State or Province, County Code, Phone, and Key Number.

To display the entire LOV for a field with an LOV:



1. Double-click the **Code** field, or click the Search button.
 - Note:** If you are on a form that was called from a field on another form, press the Ctrl key before you double-click. (Double-clicking by itself selects a value rather than displays an LOV.)
 2. If more than one form or window is associated with the field, an Option List appears. Click the option that displays the LOV.
 - Otherwise, the LOV appears automatically.
 3. Scroll (if necessary) to the desired value in the LOV.
 4. Double-click the value. The LOV closes, and the selected value is returned to the **Code** field.
1. Select the Next Item function until you reach the **Code** field.
 2. Select the List function. The LOV appears.
 3. Scroll to the desired value in the LOV (if necessary).
 4. Press Enter. The LOV closes, and the selected value is returned to the **Code** field.

File Edit Options Block Item Record Query Tools Window Help

Event: A0017 Arts Review Committee

Event Details

Description: Arts Review Committee

System: H Human Resources

Event Type: SEMN Seminar

Agency or Commercial ID: B70100

Contact ID:

Address Type:

Phone:

Campus: 001 University Employee

Site: 001 Downtown Site

District or Division: ENG Engineering Division

College: 07 University of British Columbia

Department: 2415 Fine Arts

Double-click this field, or choose the Search button.

This LOV appears.

Go to the code you want and double-click it.

Campus Validation (STVCAMP)

Find %

Code	Description	Activity Date
1	Fee Assessment Test Campus 1	19-MAR-2004
10	Campus 10	19-MAR-2004
100	Campus 100	19-MAR-2004
12	Two-character code	19-MAR-2004
123	Three-character code	19-MAR-2004
2	Off Campus	19-MAR-2004
3	Japan Center	19-MAR-2004
4	Coop Program	19-MAR-2004
5	University Employee	19-MAR-2004

Find OK Cancel

To refine your search in an LOV or Search Results window:

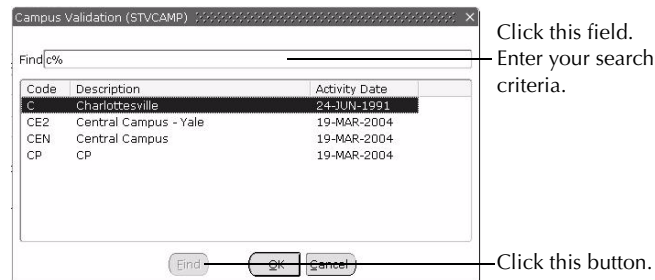
1. Click the **Find** field in the LOV or Search Results window.
2. Enter your search criteria.

Use the Oracle wildcard % to represent any number of unspecified characters.
Use the Oracle wildcard _ to represent one occurrence of an unspecified character. You can use both wildcards in the same search string.

Examples:

Enter A % to search for all codes and descriptions that start with “A”.
Enter _AID to search for all four-character codes that end with “AID”.

3. Click the Find button or press Enter.



To use a drill-down search in an LOV or Search Results window:

1. In the LOV or Search Results window, press the first character of your search string. The list displays all codes that begin with that character.
2. Press the next character in the string. The list displays all codes that begin with the two characters entered.
3. Keep adding characters to reduce the list of matches.

When you see the code you want, double-click it or press Enter. The code is returned to the field.

OR

When you have reduced the list to one match, the code is automatically returned to the field.

Start with a full list of values for department codes.

Press the character *E*. The list shows all codes that start with *E*.

Press the character *N*. The list shows all codes that start with *EN*.

You can choose a value from the list or continue entering characters until you get a single match.

Code	Description	Sys Req	VR Mes
2210	General Engineering		
2220	Chemical Engineering		
2230	Chemistry		
2240			
2250			
2255			
2256			
2260			

Code	Description	Sys Req	VR Mes
EAS	EAS	N	
ECEL	ECEL	N	
ECO	Economics	N	
ECON	Econ		
EDS	EDS		
EDT	Edu		
EDUC	Edu		
ENG	Engl		

Code	Description	Sys Req	VR Mes
ENG	English	N	
ENGL	English		
ENGR	Engineering		
ENG	Engineering Technology		

Entering Information From Another Form

Sometimes the Search button next to a **Code/Description** field takes you to another form to look for values, rather than to an LOV. You can select information from the “called form,” and return it to the current field.

To enter information in a field from a called form:



1. Click the Search button.
2. If an Option List appears, click the desired option to display the form.

Otherwise, the form appears automatically.
3. If the form opens in query mode, enter your search criteria and select **Execute Query**. The form displays matching values.

Otherwise, the form displays available values.
4. Scroll (if necessary) to the desired value on the called form.
5. Double-click the value. The called form closes, and the selected value is returned to the field.



1. Select the Next Item function until you reach the field that has the button.
2. Read the auto hint and select the equivalent function. (A field may have more than one option.) The form appears.
3. If the form opens in query mode, enter your search criteria and select **Execute Query**. The form displays matching values.

Otherwise, the form displays available values.
4. Scroll (if necessary) to the desired value on the called form.
5. Choose the Select function. The called form closes, and the selected value is returned to the field.

Click this button.

If the form opens in query mode, enter your selection criteria. Select Execute Query.

The form displays matching values.

Scroll (if necessary) to the value you want. (The selected record is highlighted.) Double-click.

Process: Parameter Set:

Printer Control

Printer: Special Print: Lines: Submit Time:

Parameter

Number	Process	Description	Printer	Validation	Title	System	Type	Lines Per Page	Special Print Stock	Activity Date
<input type="checkbox"/>	AAPACKN	Membership Acknowledgement Process			Membership Acknowledgement Process	A	PRO*C	35		23-FEB-2000
<input type="checkbox"/>	AAPADJS	Dues Adjustment Report			Dues Adjustment Report	A	PRO*C	54		09-MAR-2000
<input type="checkbox"/>	AAPCARD	Membership Card Initiation Process			Membership Card Initiation Process	A	PRO*C	55		29-DEC-1998
<input type="checkbox"/>	AAPFEED	Advancement Dues-Finance Feed			Feeds dues payments and adjustments to finance.	A	PRO*C	55		05-JUN-2003

Process Name: Record: 1/1

Process Name; Process may be Pro*C, Executable, Procedure or Oracle Report.
Record: 1/9

Entering IDs

Many Banner forms have ID fields for persons and non-persons. For example, the Function Participant Form (GEAPART) uses both person and nonperson IDs to identify participants in a function.

There are several ways to enter an ID:

- Enter a complete ID.
- Enter a complete name.
- Search by partial ID.
- Search by partial name.

- Search by SSN (U.S.), SIN (Canada), TFN (entities), or birth date.
- Use a product-specific search form.
- Search by the pattern of characters in the name (Oracle Soundex).

To enter a complete ID:

1. Enter the full ID (for example, 2314780) in the **ID** field.
2. Press Enter. The ID and name appear.

To enter a complete name:

1. Make sure the **ID** field is blank.
2. Tab to the **Name** field (unlabeled field next to the **ID** field).
3. Enter the full name.

The format is last, first, middle with a comma between each part of the name. Spaces between each piece are optional. Characters can be upper or lower case. (You get the same results whether you enter upper or lower case letters.)

Examples:

Smith, Thomas, James
Smith, Thomas (no middle name)

4. Press Enter.
 - If one match is found, the ID and name are returned to the form.
 - If more than one match is found, the ID and Name Extended Search window appears. You can select an ID (see “To select an ID from the ID and Name Extended Search window”), reduce your search (see “To reduce your search in the ID and Name Extended Search window”), or access a product-specific search form (see “To access a search form from the ID and Name Extended Search window”).

To search by partial ID:

1. Enter a partial ID in the **ID** field. Use the Oracle wildcard % to represent any number of unspecified characters.

Example:

Enter 21 % to search for all IDs that start with “21”.

2. Press Enter.
 - If one match is found, the ID and name are returned to the form.
 - If more than one match is found, the ID and Name Extended Search window appears. You can select an ID (see “To select an ID from the ID and

Name Extended Search window” in this chapter), reduce your search (see “To reduce your search in the ID and Name Extended Search window” in this chapter), or access a product-specific search form (see “To access a search form from the ID and Name Extended Search window” in this chapter).

To search by partial name:

1. Make sure the **ID** field is blank.
2. Tab to the **Name** field (unlabeled field next to the **ID** field).
3. Enter a partial name.

The format is last, first, middle with a comma between each part of the name. Spaces between each piece are optional. Characters can be upper or lower case. (You get the same results whether you enter upper or lower case letters.) Use the Oracle wildcard % to represent any number of unspecified characters.

Examples:

Enter *smith,J%* to search for all IDs with the last name “Smith” and first names that start with “J”.

Enter *mag%,p%* to search for all IDs with last names that start with “Mag” and first names that start with “P”.

Enter *,Barbara* to search for all IDs with the first name “Barbara”.

4. Press Enter.
 - If one match is found, the ID and name are returned to the form.
 - If more than one match is found, the ID and Name Extended Search window appears. You can select an ID (see “To select an ID from the ID and Name Extended Search window” in this chapter), reduce your search (see “To reduce your search in the ID and Name Extended Search window” in this chapter), or access a product-specific search form (see “To access a search form from the ID and Name Extended Search window” in this chapter).

To select an ID from the ID and Name Extended Search window:

Use these steps when you search by ID or name and multiple matches are displayed on the ID and Name Extended Search window.

1. Pull down the list of matches in the **Search Results** field.

Note: Previous names and IDs are indented under the current name and ID.

2. Scroll to the desired name and ID.
3. Click the desired name and ID. The ID and name are returned to the form.

To reduce your search in the ID and Name Extended Search window:

Use these steps when you search by ID or name and multiple matches are displayed on the ID and Name Extended Search window.

1. Select the Person, Non-Person, or Both radio button in the Reduce Search By block to identify the kind of IDs you want to search. The field next to the **Search Results** field shows the number of matches.
2. Enter your search criteria in the fields in the Reduce Search By block.
3. Click the Search button or select Execute Query. The field next to the **Search Results** field shows the number of matches.
4. *(Optional)* Repeat steps 2 and 3 to further reduce your search.

To access a search form from the ID and Name Extended Search window:

Use these steps when you search by ID or name and multiple matches are displayed on the ID and Name Extended Search window.

1. Click the Person Search Detail button or the Non-Person Search Detail button. The associated search form appears with IDs that match your original search criteria. Your original search criteria appear at the top of the form.

Example:

If *Smith, J%* is your original search criteria and you select the Person Search Detail button, the search form shows all person IDs with the last name “Smith” and first names that start with “J.”

2. To select an ID, skip to step 8.

OR

To reduce your search further, go to step 3.

3. Select the Enter Query function. A dialog box appears.
4. To extend the current search, select the Extend Your Current Query button. Information on the form is cleared. (Your original search criteria remain at the top of the form.)

OR

To discard the current search and start over, click the Start a New Query button. Information on the form is cleared.

5. Enter your search criteria in any fields on the form.

If you enter a partial field value as a search criteria, use Oracle wildcards. Use the symbol % to represent any number of unspecified characters. Use the

symbol _ to represent one occurrence of an unspecified character. You can use both wildcards in the same search string.

6. Verify the Case Sensitive Query radio buttons. Change if necessary.
7. Select the Execute Query function. The form shows all IDs with matching information.
8. Scroll to the desired ID.
9. Double-click the desired ID. The ID and name are returned to the calling form.

To search by SSN (U.S.), SIN (Canada), TFN (entities) or birth date:

ID fields on some forms allow you to go to the SSN/SIN/TFN Alternate ID Search Form (GUIALTI) and search for an ID by SSN, SIN, TFN or birth date.

1. Click the Search button next to the ID field on a form. An Option List appears.
2. Select the alternate ID search option. The SSN/SIN/TFN Alternate ID Search Form (GUIALTI) opens in query mode.

Note: Other available search options depend on the specific form and are not described here.

3. Enter your search criteria in any fields on the search form.

If you enter a partial field value, use Oracle wildcards. Use the symbol % to represent any number of unspecified characters. Use the symbol _ to represent one occurrence of an unspecified character. You can use both wildcards in the same search string.

Examples:

Enter *148296890* in the **SSN/SIN/TFN** field to search for IDs with that SSN.

Enter *06-JUN-1982* in the **Birthdate** field to search for IDs with that birth date.

4. Verify the Case Sensitive Query radio buttons. Change if necessary.
5. Select the Execute Query function. The form shows all IDs with matching information.
6. Scroll to the desired ID.
7. Double-click the desired ID. The ID and name are returned to the calling form.

To use a product-specific search form:

ID fields on some forms allow you to go to a product-specific search form and search for a person or non-person by ID or name.

1. Click the Search button next to the **ID** field on a form. An Option List appears.
2. Select the option for the person or non-person search form you want to access. The selected form opens in query mode.

Note: Other available search options depend on the specific form and are not described here.

3. Enter your search criteria in any fields on the search form.

If you enter a partial field value, use Oracle wildcards. Use the symbol % to represent any number of unspecified characters. Use the symbol _ to represent one occurrence of an unspecified character. You can use both wildcards in the same search string.

Examples:

Enter *Carnegie* in the **Last Name** field to search for all IDs with the last name “Carnegie”.

Enter *Chris%* in the **First Name** field to search for all IDs with first names that start with “Chris”.

4. Verify the Case Sensitive Query radio buttons. Change if necessary.
5. Select the Execute Query function. The form shows all IDs with matching information.
6. Scroll to the desired ID.
7. Double-click the desired ID. The ID and name are returned to the calling form.

To search by the pattern of characters in the name (Oracle Soundex):

An added option on most search forms is the Oracle Soundex search feature. You can search for an ID by entering a pattern of characters in the ID’s name. This feature is useful if you aren’t sure how to spell a name. As long as the first letter of your search string is correct, you can retrieve names with a similar pattern of characters.

1. Click the Search button next to the **ID** field on a form. An Option List appears.
2. Select the option for the search form you want to access. The selected form opens in query mode.

Note: Other available search options depend on the specific form and are not described here.

3. Select the Cancel Query function.

4. Select the Search Using “Sounds Like” option from the Option menu (or navigation frame), or select the Next Block function. The Soundex Search window appears.
5. Enter a string of characters for the last name you want to find.

You can use upper, lower, or mixed case. You can enter as much or as little of the name as you know. As long as the first letter is correct, the search will retrieve names with a similar pattern of characters.
6. *(Optional)* Enter a string of characters for the first name you want to find.
7. Select the Execute Query function. The search form shows all IDs that have a matching pattern of characters.
8. Scroll to the desired ID.
9. Double-click the desired ID. The ID and name are returned to the calling form.

Inserting New Records

Many forms contain multiple records that appear as rows. For example, an ID might have multiple address records (billing, home, and emergency contact).

You must be careful when you insert a new record:

- Once you start entering information for a new record, you must enter all required fields. If you change your mind, you must use Clear Record or Remove Record to exit. You cannot click out of a required field.
- Sometimes you must save or delete a record before you can continue. The auto hint identifies these situations.

To insert a new record:

1. Place your cursor on an existing record.
2. Select the Insert Record function. A new blank record is inserted in the list of existing records.
3. Enter information for the new record. Make sure you enter all required fields.
4. Select the Save function.

Data Format Recommendations

To ensure consistent information throughout your Banner System, data should be entered in a standard way. SunGard Higher Education recommends the following standards.

Identification (ID) Numbers

Persons	Enter an identification number of your choice, or use the identification number generated by the system on any Identification Form (xxxIDEN).
Non-persons	Use the system-generated identification number.

Names

Upper/lower case	Use conventional upper- and lower-case letters.
Last names	Do not enter spaces within prefixed last names. Examples: MacArthur, O'Connor, VanHusen, deBolt, DuShen Do not enter spaces within hyphenated last names. Examples: Smith-Jones, Cochram-Ashley
First initials with middle names	Enter a period and one space between the first initial and middle name. Example: R. Maureen Smith
Prefixes/suffixes	Use a period after a prefix or suffix, where applicable. Examples: Miss, Mrs., Mr., Rev., Jr., II

Addresses

Pound sign	If your institution uses the Banner Letter Generation module, a pound sign (#) in addresses may affect letter processing. The pound sign is a formatting command. Refer to the <i>Banner General Technical Reference Manual</i> for details.
County	Use the county codes defined on the County Code Validation Form (STVCNTY).
State and province	Use the codes defined on the State/Province Code Validation Form (STVSTAT).

ZIP/postal code	Use the standard format for the country in the address. Use the codes defined on the ZIP/Postal Code Validation Form (GTVZIPC).
Nation	Enter a nation code only if you want to include the nation when the address is printed. Use the codes defined on the Nation Code Validation Form (STVNATN).

Letter Generation

Paragraph	Letter Generation uses the pound sign (#) and period (.) to set the output mode back to normal. If you want a # or period to be text in your output, then precede it with a backslash.
-----------	--

Dates

A setting on the Installation Control Form (GUAINST) controls how you enter dates:

<i>If this format is selected:</i>	<i>Enter February 5, 2002 like this:</i>
MDY Month, Day, Year	02/05/02, 02-05-02, or 020502
DMY Day, Month, Year	05/02/02, 05-02-02, or 050202
YMD Year, Month, Day	02/02/05, 02-02-05, or 020205

Banner determines which parts of a date entry are the *month*, *day*, and *year*, and automatically converts and stores the date in the DD-MON-YYYY format. Year numbers 00 through 49 are converted to 2000 through 2049. Year numbers 50 and above default to 1950 through 1999. You can override the century default.

Follow these general recommendations when you enter dates:

- Always enter two digits for the day and month. For example, enter 01 for January, not 1.
- If you enter only part of the date, the rest of the *current* date is the default.
- You can enter a date without separators (no spaces), or you can use a dash (-) or slash (/) as separators.

Tip: You can enter any single, non-numeric character into the **Date** field and Banner will automatically convert it to today's date. For example, if you enter "a" or "g" and go to the next field, Banner will enter today's date as the default.

Dates in Job Submission

Use the DD-MON-YYYY or DD-MON-YY format to enter date parameters for reports and processes run with the Process Submission Control Form (GJAPCTL).

Dates in Reports and Process Output

Some, but not all, reports include the century with the year in their output.

Dates in Query Mode

Specify all four digits for a year when you query on a date field. For example, enter 26-JUN-2002, not 26-JUN-02. If you omit the century, zeros are entered for the century. In this example, if you enter 26-JUN-02, Banner expands the date to 26-JUNE-0002, not 26-JUN-2002.

Avoid Special Characters

In general, you should avoid using special characters in text fields. Characters such as the hyphen (-), slash (/), asterisk (*), and plus sign (+) may cause confusion, for example, because they can also represent mathematical instructions.

The pound sign (#), as noted earlier, is a formatting character in Letter Generation output. To avoid problems with Letter Generation, do not enter a pound sign (#) in addresses.

Special characters won't always cause immediate problems, but they represent a potential source of complications when Banner interoperates with other systems.

The following characters should generally be avoided in text fields:

- the pound sign (#)
- the slash (/)
- the plus (+)
- the hyphen (-)
- the ampersand (&)
- the at-sign (@), except in e-mail addresses
- the dollar sign (\$)
- the exclamation point (!)
- the comma (,)
- the asterisk (*)
- the percent sign (%)

If you must use a special character, use it without any spaces before or after it:

Valid: *Separated/Divorced*

Invalid: *Separated / Divorced*

Querying Information

Querying is the process of looking to see what information is already entered in the Banner database. You can use inquiry forms, query forms, and most application forms to perform queries.

Some forms automatically open in query mode, usually because a large number of records would have to be retrieved. When a form opens in query mode, **Enter Query** appears in the status line. You can immediately specify search criteria to narrow the search. If a form does not open in query mode you must put the form into query mode before you can enter search criteria.

Query Functions

Use the following functions to perform queries:

Enter	Puts the form into query mode so you can enter search criteria to see what information is already in the database. Enter Query appears in the status line.
Execute	Searches the database and displays the first set of records that match your search criteria. This function is enabled only if you are in query mode.
Last Criteria	Enters the criteria from your last search. You can change any of the criteria. This function is enabled only if you are in query mode.
Exit or Cancel	Cancels the query and takes the form out of query mode. Note: If you aren't in query mode, the Cancel Query button on the toolbar exits you from the form.
Count Query Hits	Counts the number of records that match the search criteria and displays that number in the auto hint.
Fetch Next Set	Replaces the current set of displayed records with the next set of records if more records match the search criteria than fit in the window. This function is enabled only if you are in query mode.

To query information:

1. Access the form you want to query.
2. If the form opens in query mode (**Enter Query** is in the status line), go directly to step 3.

If the form does not open in query mode (**Enter Query** is not in the status line), select the Enter Query function.

3. Enter the search criteria.

You can query information in any field that you can access. You can use the Oracle wildcards % and _. Capitalization matters. Data is matched against the search criteria exactly as you enter them.

4. Select the Execute Query function. The form displays all records that match the search criteria.

Make sure the form is in query mode.

Enter the search criteria.

Select Execute Query.

The form displays all matching records.

ZIP or Postal Code	City	County	State or Province	Nation	Activity Date
00983	Carolina		PR		03-MAR-2004
02138	Cambridge		MA		03-MAR-2004
02139	Cambridge		MA		03-MAR-2004
15419	California		PA		11-JAN-1995
62901	Carbondale		IL		11-JAN-1995
63701	Cape Girardeau		MO		11-JAN-1995
T2M 0L4	Calgary		AB	27	21-JAN-1992
T3E 6K6	Calgary		AB	27	18-JAN-1995

To change your search criteria and re-query:

Use these steps after you query information and you want to re-query with different search criteria.

1. With the original matches displayed, select the Enter Query function. Matching records from the previous query disappear.
2. Select the Enter Query function a second time. The original search criteria appear.
3. Revise your search criteria.
4. Select the Execute Query function. The form displays all records that match the revised search criteria.

To query a checked check box:

1. Select the Enter Query function.
2. Select (check) the check box.
3. (Optional) Enter additional search criteria.
4. Select the Execute Query function. The form displays records that have matching information, including a checked check box.

To count queries:

Use these steps to determine how many records match your query criteria before you execute the query.

1. Access the form you want to query.
2. If the form opens in query mode (**Enter Query** is in the status line), go directly to step 3.

If the form does not open in query mode (**Enter Query** is not in the status line), select the Enter Query function.

3. Enter the search criteria.

You can query information in any field that you can access. You can use the Oracle wildcards % and _. Capitalization matters. Data is matched against the search criteria exactly as you enter them.

4. Select the Count Query Hits function. The auto hint shows the number of matches.

Note: On some forms the Count Query Hits function is redefined to a special function. In these cases, Count Query Hits may not count the number of records that match your query criteria.

Wildcards

You can use the Oracle wildcards % and _ in the search criteria:

- The character % represents any number of unspecified characters.
- The character _ represents one occurrence of an unspecified character.

The following examples illustrate the use of wildcards:

<i>To get these results:</i>	<i>Enter this criteria:</i>
All entries that contain “ma”	%ma%
All entries that begin with “ma”	ma%
All entries that have “ma” as the last two characters	%ma
All entries that have “m” as the second character	_m%

With experience, it becomes easier to narrow your queries to get the results you want.

Extended Queries

With extended queries, you can use SQL*Plus operators to enter more specific query criteria.

Note: The column(s) you select in an extended query must be in “base” database tables; they cannot come from temporary work fields. For example, if you try to use the extended query feature on the **Class** field (by entering *a:* and then selecting *Execute query*) on the AOAIIDEN form, it does not open the Query/Where window, but instead displays the following message:

FRM-40301: Query caused no records to be retrieved. Re-enter.

To determine whether data is coming from a base table, you can check the item properties on the field:

- (a) Choose Help>Item Properties in the menu bar.
- (b) Check whether the attribute called *base table* contains a value of *TRUE* or *FALSE*. If the value is *FALSE*, then you will not be able to do an extended query on that field. If the value is *TRUE*, then you can use the extended query feature.

To perform an extended query:

1. Access the form you want to query.
2. If the form opens in query mode (**Enter Query** is in the status line), go directly to step 3.

If the form does not open in query mode (**Enter Query** is not in the status line), select the Enter Query function.
3. Move to the field where you want to use extended query.
4. Enter a colon followed by an identifying character such as *A*. If you are using extended query in more than one field, enter a different character in each field (for example, *:B*, *:C*, and *:D*).
5. *(Optional)* Enter additional search criteria.
6. Select the Execute Query function. The Query/Where window opens.
7. Enter the search criteria beginning with a colon, followed by the identifying character, the appropriate SQL*Plus query operators, and values to match.

Example: :A>'15-SEP-02'

Note: Due to Oracle limitations, the maximum number of search characters is 200.

8. Click the OK button. The form reappears with the results of the query.

Note: The Search button in the Query/Where window controls the Oracle Search and Replace function, not the Execute Query function.

Enter :A as the search criteria.

Select Execute Query.

This window appears. Enter :A followed by the appropriate SQL*Plus query operators and the values to match.

Click this button.

The form displays all matching records.

The screenshot shows the 'Event Function Inquiry' window with the following details:

- Event:** A0005 Wellington Advantage Winners
- System:** Student
- Search Criteria:** Start Date: :A
- Query/Where:** :A>'15-JUL-2003'
- Buttons:** OK, Cancel, Search

The results table displays the following data:

Function	Type	Start Date	End Date	Planned Attendance
AFSCMEORIE	ORIE	01-MAY-2004	01-MAY-2004	11
GOLF	SPRT	12-OCT-2004	14-OCT-2004	33

Extended ID and Name Searching

Using ID and Name Extended Search

1. In the key block **ID** field, enter a partial ID and a wildcard (% and _), or enter a partial name in the **Name** field. Wildcards can also be used in the **Name** field but are not required for searching. For example, if an entire last name is entered, with no first name or wildcards, the extended search window will open and the search results will include all persons/non-person that have the last name.

2. The ID and Name Extended Search window will display.

The Person/Non-Person count provides a count of the number of persons/non-persons returned by the search.

3. Click the **Results** pull-down list to see the ID and name of the person/non-persons returned from the query.

Note: A person/non-person may be listed multiple times in the results list if the person has alternate names or IDs. However, each person/non-person is only included in the count once.

To review additional information about the persons in the search result set:

Click the Person Search Detail Icon. The Person Search form will open. (The form that is called will vary by Banner product. For example, if the searching is being performed on a Student form such as SPAIDEN, the SOIDEN form will open.) An ID can be selected on this form. If the ID is selected, you will be returned to the original form and this ID will display in the keyblock. If no ID is selected, when you exit this form, you will return to the keyblock of the original form. The extended search window will not redisplay automatically.

To review additional information about the non-persons in the search result set:

Click the Non-Person Search Detail icon. The Non-Person Search form will open (The form that is called will vary by Banner product. For example, if the searching is being performed on a Student form such as SPAIDEN, the SOACOMP form will open.). An ID can be selected on this form. If the ID is selected, you will be returned to the original form and this ID will display in the keyblock. If no ID is selected, when you exit this form, you will return to the keyblock of the original form. The extended search window will not redisplay automatically.

To reduce the search to person or non-person:

1. Click the radio button for person or non-person.
2. The results will be updated to include only persons or non-persons depending on your selection.
3. To reset the results to include all, select the radio button *Both*.

To reduce search based on additional criteria:

1. Add additional search criteria in any combination of the fields: City, State or Province, ZIP or Postal Code, Name Type, SSN/SIN/TIN, Birth Date, Gender.
2. Click the Reduce Search button.

To clear a data from a previous search, or to enter a new query:

1. Click the Clear Search button.

To close the extended search window:

1. Click the X in the upper right hand corner of the window, or use the keystrokes to perform Clear Form.

To enter current identification data for a person:

1. Access an Identification Form (%IDEN).
2. Enter the ID.

Note: If Common Matching is enabled for you, you will be directed to the Common Matching Entry Form (GOAMTCH) where you can enter information for the new ID and check for matches. Save the record. The ID and associated name are displayed in the key block.

3. Go to the Current Identification tab.

Note: If the person currently has a record in Banner, the system copies the identification information and automatically places it into the fields in the current identification block. Complete the remaining fields, following the directions below.

4. Enter the person's **Name Type**.
5. Enter the person's **SSN/TIN/SIN**. (This field is available on FOAIDEN and PPAIDEN).
6. Enter the person's **Last Name**.
7. Enter the person's **First Name**.
8. Enter the person's **Middle Name**.
9. Enter the person's name **Prefix**.
10. Enter the person's name **Suffix**.
11. Enter the person's **Marital Status**. (This field is available on APAIDEN and FOAIDEN).
12. Save.

To enter alternate identification data for a person:

1. Access an Identification Form (%IDEN).
2. Verify the **ID** and the **First Name**, **Last Name**, and **Middle Initial** information in the Current Identification tab.

Note: If the ID is generated, you must save the record before accessing the Alternate Identification block.

Note: If Common Matching is enabled for you, you will be directed to the Common Matching Entry Form (GOAMTCH) where you can enter information for the new ID and check for matches. Save the record. The ID and associated name are displayed in the key block.

3. Go to the next block (Alternate Identification tab).
4. Enter the **Change of Name** or **ID**.

Note: Duplicate Record will copy the ID or name information into the appropriate fields in the Alternate Identification tab depending on what type of change you enter.

5. Enter the person's alternate ID.

OR

Enter the person's alternate **Last Name**.

6. Enter the person's alternate **First Name**.
7. Enter the person's alternate **Middle Name**.
8. Save your changes.

To view alternate identification data for a person:

1. Access an Identification Form (%IDEN).
2. Verify the **ID** and the **First Name**, **Last Name**, and **Middle Name** information on the Current Identification tab.
3. Go to the next block (Alternate Identification tab).

To enter address information for a person:

1. Access an Identification Form (%IDEN).
2. Enter the **ID**.

3. Verify that the person's **First Name** and **Last Name** have been entered on the main window in the Current Identification tab.
4. Go to the Address Information tab.

Note: If the person currently has a record in Banner, the system displays the address information in the Address Information tab. You can insert new information by selecting Insert Record. Complete the remaining fields, following the directions below.

5. Enter the **Type** code for a new address.

OR

Select an address to be modified from the group of addresses previously entered for the person.

6. Enter the street address portion of the address in the **Address** fields. The first field is required. The remaining fields of the address are optional.
7. Enter the **City** (required), **State or Province**, and **ZIP or Postal Code** portion of the address.

OR

Search to select a **City**, **ZIP or Postal Code**, and **State or Province** from the ZIP or Postal Code Validation Form (GTVZIPC).

Note: If the city and state are both blank and a ZIP or postal code is entered, the city and state will default into those fields from GTVZIPC.

8. Enter the **Nation** code portion of the address.

Note: You must enter either the **State /Province** code or the **Nation** code.

9. If you do not want to create bar codes for the address, go to the last step.

OR

If you want to create bar codes for the addresses, go to the next step.

10. Select the **ZIP/PC** field, and open the Delivery Information window.
11. Enter all available delivery information.
12. Return to the Address tab.
13. (Optional) Enter the **Phone** number associated with the **Address**.
14. Save.

Note: A person must have at least one complete address.

To enter current identification data for a non-person:

1. Access an Identification Form (%IDEN).
2. Enter an **ID**.

Note: If Common Matching is enabled for you, you will be directed to the Common Matching Entry Form (GOAMTCH) where you can enter information for the new ID and check for matches. Save the record. The ID and associated name are displayed in the key block.

3. Go to the next block.
4. Enter the name of the non-person in the **Non-Person Information** field.
5. Save.

To enter address information for a non-person:

1. Access an Identification Form (%IDEN).
2. Enter the ID of the non-person you are identifying.
3. Verify the non-person's **Name** field entry have been entered on the Current Identification tab.
4. Go to the Address tab.
5. Enter the **Type** code for a new address.

OR

Select an address to be modified from the group of addresses previously entered for the person.

6. Enter the street address portion of the address in the **Address** fields. The first field is required. The remaining fields of the address are optional.
7. Enter the **City** (required), **State or Province**, and **ZIP or Postal Code** portion of the address.

OR

Search to select a **City**, **ZIP or Postal Code**, and **State or Province** from the ZIP or Postal Code Validation Form (GTVZIPC).

Note: If the city and state are both blank and a ZIP or postal code is entered, the city and state will default into those fields from GTVZIPC.

8. Enter the **Nation** code portion of the address.

Note: You must enter either the **State/Province** code or the **Nation** code.

9. If you do not want to create bar codes for the address, go to step 13.

OR

If you want to create bar codes for the addresses, go to step 10.

10. Select the ZIP/PC field, and open the Delivery Information window.
11. Enter all available delivery information.
12. Return to the Address tab.
13. (Optional) Enter the Telephone number associated with the address.
14. Save.

To enter a primary telephone number with a new address:

1. Access an Identification Form (%IDEN).
2. Enter the ID of the non-person.
3. Go to the next block.
4. Go to the Address tab.
5. Enter the **Type** code for the new address.
6. Enter the street address portion of the address in the **Address** fields. The first field is required. The remaining fields of the address are optional.
7. Enter the **City** (required), **State or Province**, and **ZIP or Postal Code** portion of the address.

OR

Search to select a **City**, **ZIP or Postal Code**, and **State or Province** from the ZIP or Postal Code Validation Form (GTVZIPC).

Note: If the city and state are both blank and a ZIP or postal code is entered, the city and state will default into those fields from GTVZIPC.

8. Enter the **Nation Code** portion of the address.

Note: You must enter either the State/Province code or the Nation code.

9. Enter the area code, basic number, and the extension in the **Phone** fields.
10. Enter the **Telephone Type**.

Note: Telephone types are associated with address types on the Address Type Code Validation Form (STVATYP). The telephone type associated with the address type defaults, but can be overwritten.

11. Save.

Note: Telephone numbers entered on the address tab are automatically associated with an address.

To add a primary number to an existing address:

1. Access an Identification Form (%IDEN).
2. Enter the ID of the non-person.
3. Go to the next block.
4. Go to the Address tab.
5. In the Address tab, select the address that is associated with the telephone number.
6. Enter the area code, basic number, and the extension in the **Phone** fields.
7. Enter the **Telephone Type**.

Note: Telephone types are associated with address types on the Address Type Code Validation Form (STVATYP). The telephone type associated with the address type defaults, but can be overwritten.

8. Save.

To update an organization's and a person's name or ID:

1. Access an Identification Form (%IDEN).
2. Go to the Current Identification tab.
3. Enter the new data over the existing data.
4. Save.
5. Go to the next block (Alternate Identification tab) to see the changes.

Note: For updated IDs, the ID appears in the **Change** field. For updated names, the name appears in the **Change** field.

6. Select Next Record to view alternate names or IDs.

To delete an organization's and person's alternate name or ID:

1. Access an Identification Form (%IDEN).
2. Select Next Record until the desired name or ID appears.
3. Select Remove Record.
4. Save.

Note: The record is no longer displayed, and it no longer exists on either the Person Search Form (SOAIDEN) or the Non-Person Search Form (SOACOMP).

To determine who entered the current name/ID of a non-person and the form on which the data was entered:

1. Access an Identification Form (%IDEN).
2. Enter the ID of the non-person you are identifying.
3. Verify that the non-person's name has been entered on the main window on the Current Identification tab.
4. Review the data in the ID and Name Source block.

To determine who entered the alternate name/ID of a non-person and the form on which the data was entered:

1. Access an Identification Form (%IDEN).
2. Enter the ID of the non-person you are identifying.
3. Verify that the non-person's name has been entered on the main window on the Current Identification tab.
4. Go to the Alternate Identification tab.
5. Review the data in the **Origin**, **User**, **Activity Date**, **Create User**, and **Create Date** fields.

Date Queries

Date queries require special care.

Centuries in the Year

You must specify all four digits for a year when you query on a date field. For example, enter 26-JUN-2002, not 26-JUN-02. If you omit the century, zeros are

entered for the century. In this example, if you enter *26-JUN-02*, Banner expands the date to *26-JUNE-0002*, not *26-JUN-2002*.

Dates and Time Stamps

Banner stores most dates with a time stamp. You don't see the time stamp, but it's part of the date record and can affect the results of a query.

When you include a date in your query criteria, Banner often adds the time **00:00:00** to the query criteria. You probably won't get any matches with this timestamp, resulting in the message **Query caused no records to be retrieved. Re-enter.**

To get the results you want, use one of these methods to enter the search criteria:

- Use a relational operator with an earlier or later date. For example, to find records dated 26-JUN-2002, enter *>25-JUN-2002* and *< 27-JUN-2002*. The query results will include all records dated after June 25 and before June 27.
- Use an extended query. In the Query/Where window, use a two-digit year (for example, *02* rather than *2002*). For more information on extended query, see "Extended Queries" on page 3-30.
- Use the TRUNC function. The query *:A>'15-SEP-02'* will return all rows that have an activity date (or some other date) of 15 September 2002. However, to find a row(s) that occurs on one date, you need to use the TRUNC function as follows:

```
TRUNC(:A) = '05-MAY-2004'
```

Viewing Job Submission Output

You can view Job Submission output online with the Saved Output Review Form (GJIREVO):

- The *.log* file contains technical details about running the report or process.
- The *.lis* file contains the report output.
- The *.doc* file (for mail merges) can be viewed for the Letter Generation Print Report (GLRLETR).

These files can be written to the database, if so requested, and can also be displayed or saved to your local desktop machine.

To view, save, and print output:

1. Use the Process Submission Control Form (GJAPCTL) to run the report or process as usual. Enter *DATABASE* in the **Printer** field.
 2. Access the Saved Output Review Form (GJIREVO). The form shows the **Process** and **Number** of the report or process just run.
 3. Double-click the **File Name** field (or use the button) to display a list of the files that were created.
 4. Choose the file you want to display. Click OK. The output appears in your Banner window.
 5. (Optional) If you want to view the output in a browser window:
 - (a) Select Show Documents (Save and Print File) from the Options menu. A dialog box asks if you want to continue.
 - (b) Click the Yes button. The output appears in a browser window.
- Note:** Your site administrator must set up the Web URL needed to view output in a browser window.
6. (Optional) To save the output, use the browser File>Save As option.
 7. (Optional) To print the output:
 - (a) If you have not already done so, use the browser File>Save As option to save the output.
 - (b) Open the saved output.
 - (c) Use the File>Print option to print the output.

Extracting Banner Data to a Spreadsheet

You can extract data from a Banner form to a spreadsheet. On some forms, you have the option to extract detail data from the current block either with or without data from the key block included. Once in a spreadsheet, you can easily make graphs and reports for the data.

Availability of the Extract Feature

SunGard Higher Education delivers the extract feature on all validation forms, and also on a limited number of rule, application, and inquiry forms where the feature has been tested. This feature has been tested on the following non-validation forms:

Accounts Receivable

Extract details with or without key data:

TFADETL
TGIACCD
TSASBRL

Extract details only:

TGACPSV
TSAAREV

Advancement

Extract details with or without key data:

AGCDESC
AGCGADJ
AGCGIFT
AGCPADJ
AGCPLDG
ADAGIFT
APAClub
APACOMB
APAEXRS
APAFHIS
APAIGRP
SOAHOLD

Extract details only:

AAAMBDP
AAAMBRL
AFCCAMP
AGAADJR
AGACTRL
AGAMGIF
AMCSTGY
APAACCTY
APADCDP
APAGHIS
ASCSORG
AUAIGRP
SLABQRY
SLQEVNT

Finance

Extract details with or without key data:

FGITBAL
FIASPND
FOATEXT
FRABUDP
FRIBUDT
FRIBUTG
FRIEVNG
FRIEVNP
FRIGSUM
SOAHOLD

Extract details only:

FEREDIC
FFAFDEL
FFASYSC
FGIBAVL
FGIBDST
FOA1099
FOASYSC
FRIBUDG
FRIBUDP
FRIGRNT
FRIPROP
FTMACCI
FTMACCT
FTMACTV
FTMCOAS
FTMLOCN
SLABQRY
SLQEVNT

Financial Aid

Extract details with or without key data:

Extract details only:

RCRDTSR

General

Extract details with or without key data:

Extract details only:

GJAPDEF
GLAEXTR
GLIEXTR
GLISLCT
GLIVRBL
GUALETR
GUAOPTM
GUAPARA
GUIMAIL
SOAHOLD

GJAJOB
GLIOBJT
GOAADRL
GOAFBPR
GORDMCL
GORDMSK
GORFDMN
GORFDPI
GORFDPL
GORFDTP
GUAOBS
SLABQRY
SLQEVNT

Human Resources

Extract details with or without key data:

Extract details only:

NBAPOS
NBIBHSC
NBIBHSF
NBIBHSP
NBIBHSR
NBIBTOT
NBIPINC
NBIPORG
NBIWKSH
NHIDIST
NHIEDST
NOIEMSG
NTRAPTY
NTRBROL
NTRFBLD
NTRPCLS
NTRROUT
NTRWKSH
PDAFLEX
PDIDLST
PEAFDED
PEALEAV
PEAJACT

NBAFISC
NBQPOS
NTRAUSG
NTRFINI
NTRFRNG
NTRHROL
NTRSGRP
PTRBCAT
PTRCALN
PTRETHN
PTRSKIL
PTRSKLV
PTRUSER
SLABQRY
SLQEVNT

Extract details with or without key data:

Extract details only:

PEAJFAC
PEAPADV
PEAXJOB
PEIDTOT
PEILHIS
PHADSUM
PHAMTIM
PHATIME
PHIDERR
PHIETIM
PHITTOT
PTRBDCA
PTREARN
PTRECLS
PTRSHFT
PXAASCD
SOAHOLD

Student

Extract details with or without key data:

Extract details only:

SFAFAUD
SFARCTT
SFARGFE
SFASLST
SHACRSE
SIAASGQ
SOAHOLD
SOAXREF
SRASUMI

SFAREGQ
SFAREGS
SHACRMQ
SHARQTC
SHARQTS
SLABQRY
SLQEVNT
SMACACT
SOATRIM
SOACCOL
SOILCUR
SORCACT

Your system administrator can use the Object Maintenance Form (GUAOBS) to enable the extract feature on any form where the extract has been tested.

Extract results are unpredictable on forms that have not been tested with this feature. If you want to extract data on an untested form, your system administrator can consider enabling the extract feature on GUAOBS. SunGard Higher Education does not support this feature on untested forms, but will, however, continue to test more forms and expand support with future releases.

You can tell that the extract feature is enabled on a specific form if one or both of the following options is enabled in the Help pull-down menu for the form:

- **Extract Data with Key** extracts details in the current block with key data.
- **Extract Data No Key** extracts details in the current block without key data.

The **Data Extract Option** field on GUAOBSJ determines whether one, both, or neither of these extract options is available for a form.

Extracting Data

Extracted data can be saved to a file with a *.csv* extension, or displayed as text in a new browser window, depending upon what is set up on the Directory Options window of the General User Preferences Maintenance Form (GUAUPRF).

Generally, your site administrator specifies a value for the entire institution, but you may have the option to set your own preference. If you do, then you can use the following steps to specify your preference.

To specify your preference for extracting data:

1. Access the General User Preferences Maintenance Form (GUAUPRF).
2. Go to the Directory Options window.
3. Scroll to the record where **Description** is *Data extract format: FILE (.csv), TEXT, or WEBUTIL*.
4. If you want your extracted data to be placed into a file in comma separated value format (with a *.csv* extension), enter *FILE* in the **User Value** field. When you extract data, you will be prompted to save it to your local drive.

OR

If you want your extracted data to be displayed in a separate browser window, enter *TEXT*. The information is display-only, but you can save it in a variety of formats.

OR

If your institution uses the WebUtil option, you can enter *WEBUTIL* to save the *.csv* file to your local drive using the General WebUtil File Extract Form (GUQWUTL).

Note: Before using the WebUtil option, ensure that your institution has configured it.

5. (Optional) If your institution uses the WebUtil option, you can specify a default directory to save your output in the **User Value** field for the *Local directory for saving output* record.
6. Save.

To perform a data extract:

1. Access the Banner form.
2. If applicable, display the desired records on the form.
3. Select one of the following options from the Help pull-down menu:
 - *Extract Data with Key* (to extract key data and data in the current block)
 - *Extract Data No Key* (to extract data in the current block only)

Extracted data is displayed in a browser window, or you are prompted to save the output file, depending on which option is specified on the General User Preferences Maintenance Form (GUAUPRF).

Tip: To save the data from your browser window to a file, use Internet Explorer's File>Save As option to save the extracted data to a local directory as a .txt file. Then rename the file as a .csv file.

OR

For Netscape, use the browser's File>Save As option to save the extracted data to a local directory as a .csv file.

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Chapter 4 Features of Banner

Using the Calendar

There are three ways to display the calendar:

- Double-click any date field, or click the Calendar button. If the date field has a value, the calendar highlights that date. If the date field is empty, the calendar highlights the current date. You can double-click a date on the calendar to return it to the calling form.
- Use Direct Access to display the Calendar Form (GUACALN). When accessed this way, the calendar works independently of any form or field. You cannot select a date and return it to a form.
- Select Help>Calendar. When accessed this way, the calendar works independently of any form or field. You cannot select a date and return it to a form.

Double-click this field.

The calendar appears.

Double-click any date on the calendar to return it to the **Date** field on the form.

- **Banner Documentation Bookshelf.** This tool lets you access Banner documents directly from your computer by using a desktop shortcut. These electronic documents look the same as the hard copy versions, regardless of the computer you are using.
- **Help (Item Properties).** This list shows all the properties of the field where the cursor is currently located.
- **Show Keys.** This list shows the Oracle functions and associated keystrokes available in your environment for the field, window, and form where the cursor is currently located.
- **Auto hint.** This hint at the bottom of the form briefly describes the field where the cursor is located. Error and processing messages also appear here.

Online Help

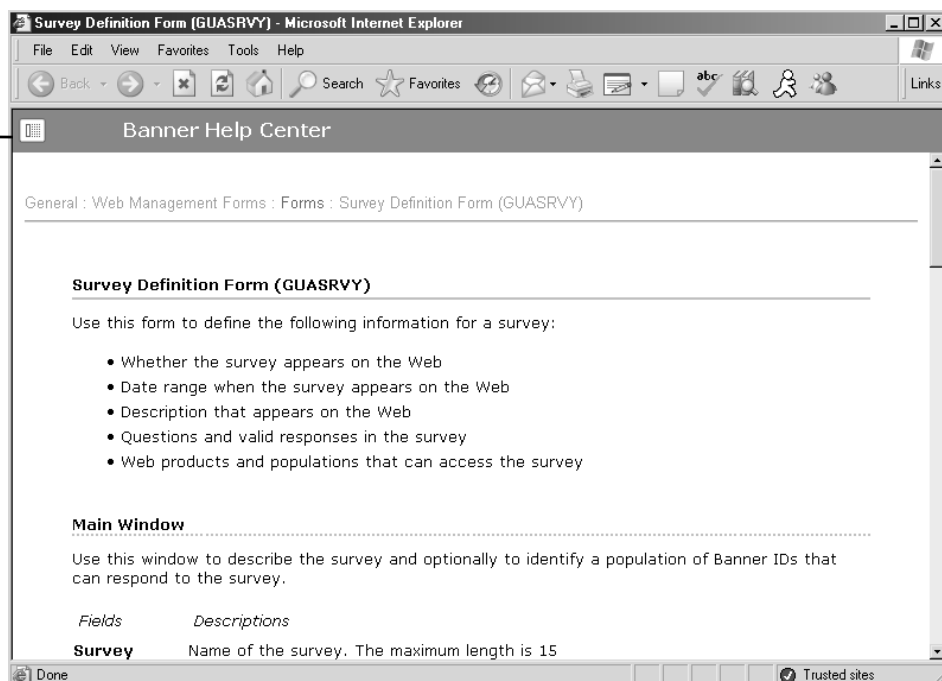
Banner online help contains information about forms and fields, as well as tasks you can perform with Banner. This help system runs in a web browser.

Installation and configuration information is contained in the *Banner Middle Tier Implementation Guide*. These activities are performed by your site administrator.

Accessing Online Help for a Form

When you access online help, information about the current form is displayed. From there, you can expand the help window to browse through other topics, or to use the search and index features to look for specific topics.

Click this button to expand the help system.



To display online help for a form:

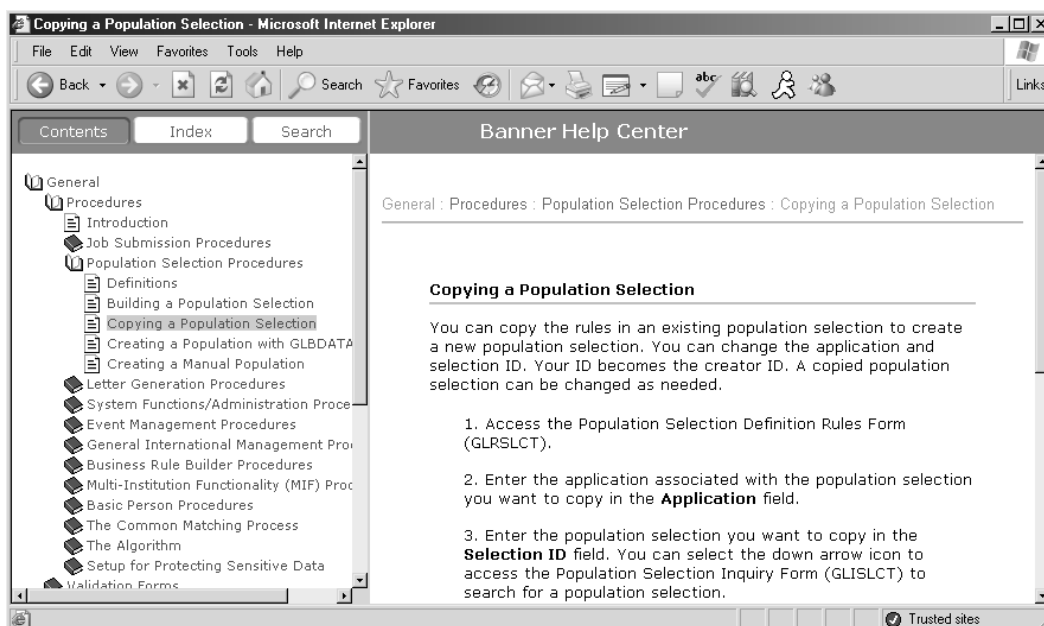


1. Click the Online Help button in the toolbar.
1. Select Help>Online Help.

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.

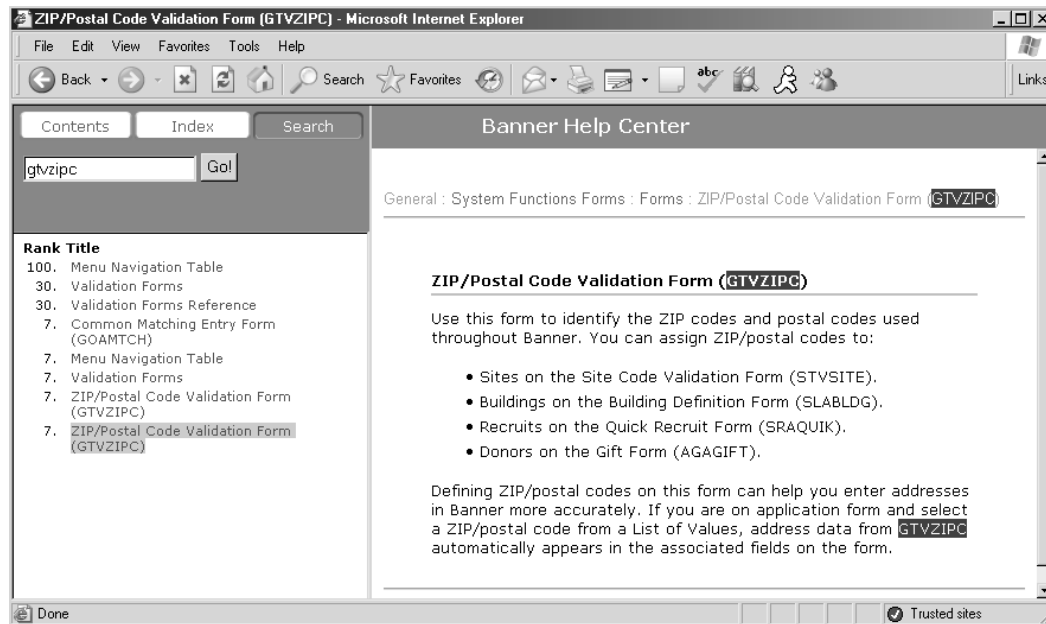
Browsing with the Contents tab



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.

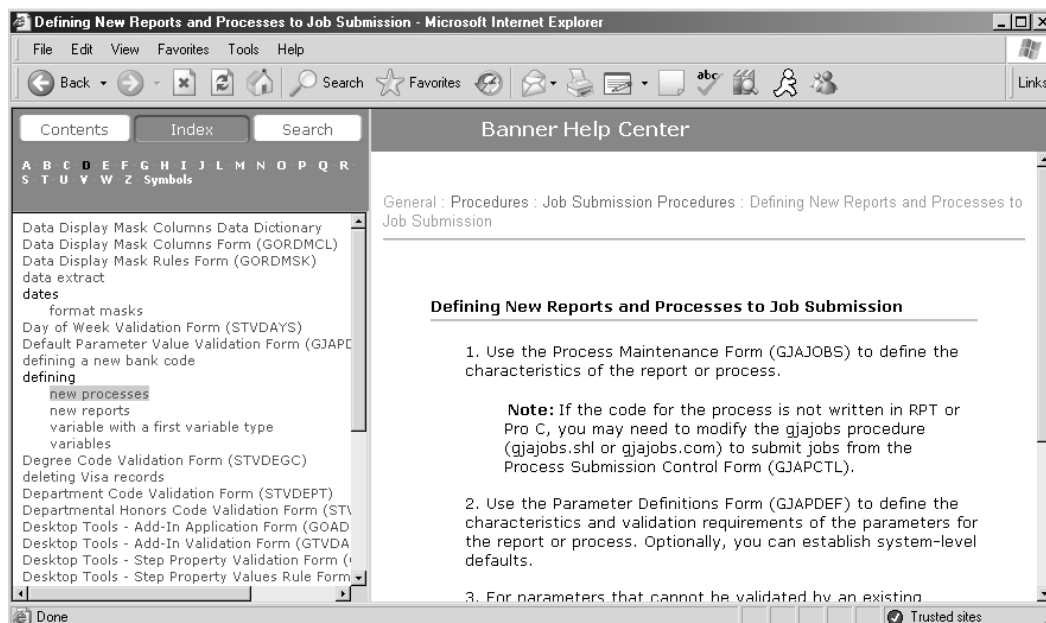
Searching with the Search tab



Using the Index

The Index tab provides an alphabetical listing of topics within the help system. Click on a letter in the index to scroll through topics that begin with that letter.

Searching with the Index tab



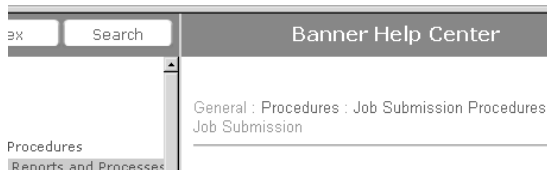
Accessing the Help Center

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.

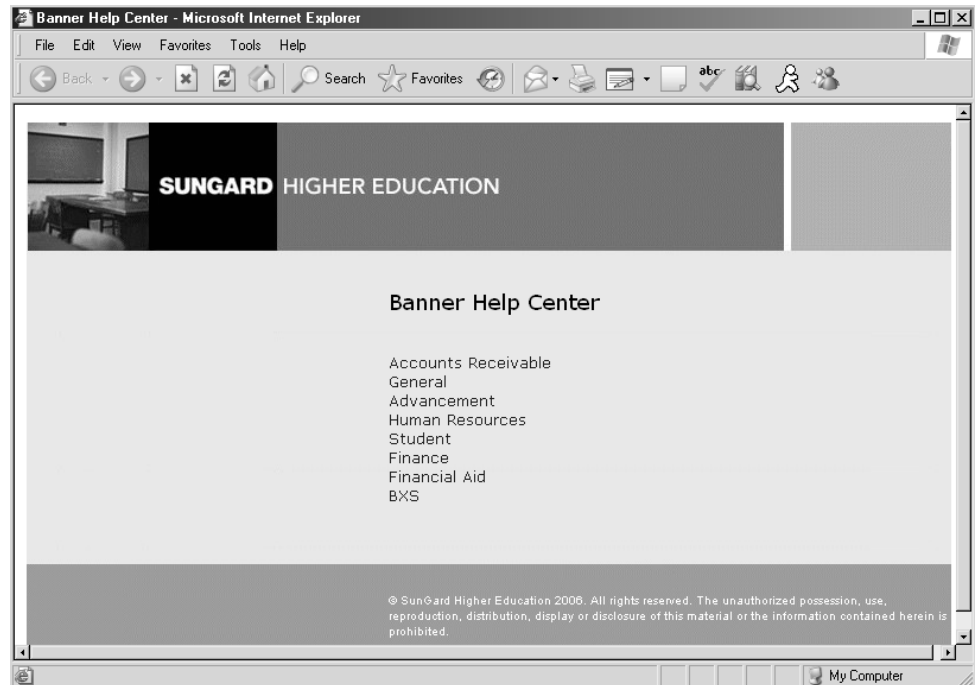
From the Main Menu



From Within the Help System



From either the main menu or within the help system, the Help Center appears:



Note: Only products that are licensed at your site appear on the Help Center page.

To display the Help Center



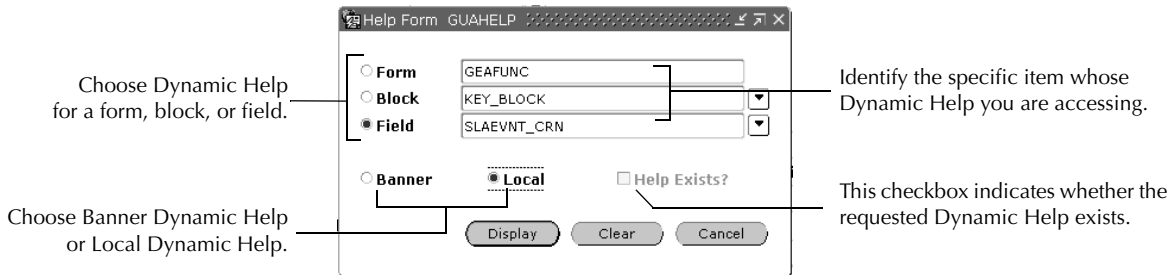
- | | |
|--|--|
| <ol style="list-style-type: none"> 1. Click the Help Center link on the main menu, or click the Banner Help Center link within the help system. | <ol style="list-style-type: none"> 1. Use the Tab key to navigate to the Banner Help Center link within the help system. 2. Press the Enter key. |
|--|--|

Local Dynamic Help

This help is completely written and maintained by your institution. System upgrades do not affect this help text. It is the default when you access Dynamic Help.

Local Dynamic Help is displayed on the Help Form (GUAHELP). You can access GUAHELP in query mode or edit mode.

You can use the main window of GUAHELP to identify the help text you want to access. A check box tells you if the requested item has help text.



When you first access the main window, the selection criteria indicate Local Dynamic Help for the field where the cursor is located. Banner internal item names identify the current form, block, and field.

You can override the defaults and access help text for another form, block, or field. For Local Dynamic Help, you can create block and field names that make sense to your institution. (Banner does not define the names.) Once you create a name, you must always use that name to access Local Dynamic Help for the item. SunGard Higher Education recommends that you use the Banner-defined names for all your Banner-delivered forms.

To access Dynamic Help in query mode:



- | | |
|--|---|
| <ol style="list-style-type: none"> 1. Press Shift and double-click a field. The Help Form (GUAHELP) appears. The default selection criteria indicate Local Dynamic Help for the field you clicked. 2. Verify the default selection criteria. Change if necessary. 3. Click the Display button. The Help Text window shows help text for the requested item. | <ol style="list-style-type: none"> 1. Select Help>Dynamic Help Query. The Help Form (GUAHELP) appears. The default selection criteria indicate Local Dynamic Help for the current field. 2. Verify the default selection criteria. Change if necessary. 3. Select the Next Block function. The Help Text window shows help text for the requested item. |
|--|---|

To access Dynamic Help in edit mode:

1. Select Help>Dynamic Help Edit. The Help Form (GUAHELP) appears. The default selection criteria indicate Local Dynamic Help for the current field.
2. Verify the default selection criteria. Change if necessary.
3. Select the Edit button or the Next Block function. The Help Text window shows help text for the requested item.

To override the defaults and access Dynamic Help for another item:

1. Access Dynamic Help in either query mode or edit mode. The default selection criteria on the Help Form (GUAHELP) indicate Local Dynamic Help for the current field.
2. To access help text for another form, choose the Form radio button and enter the form name.

OR

To access help text for another block, choose the Block radio button and enter the form and block names.

OR

To access help text for another field, choose the Field radio button and enter the form, block, and field names.

3. Select the radio button for the type of Dynamic Help you want to access (Banner Dynamic Help or Local Dynamic Help).
4. Select the Display button (query mode), Edit button (edit mode), or Next Block function. The Help Text window shows help text for the requested item.

To choose a block or field name from an LOV:

Use these steps if you don't know the block or field name of the Dynamic Help you want to display. You can display an LOV that lists all the blocks or fields on the form that have Dynamic Help.

If you display Banner Dynamic Help, the LOV shows internal item names. If you display Local Dynamic Help, the LOV shows the names you assigned.



1. Access the Help Form (GUAHELP).
2. Click the Banner or Local radio button on the main window.
3. Verify the form name. Change if necessary.
4. For block names, click the Search button on the **Block** field. An LOV appears.

OR

For field names, verify the block name. Then click the Search button on the **Field** field. An LOV appears.

5. Scroll to the desired name.
6. Double-click the name. The selected name is returned to GUAHELP.

1. Access the Help Form (GUAHELP).
2. Select the Banner or Local radio button on the main window.
3. Verify the form name. Change if necessary.
4. For block names, select the Next Item function until you reach the **Block** field.

OR

For field names, verify the block name. Then select the Next Item function until you reach the **Field** field.

5. Select the List function. An LOV appears.
6. Scroll to the desired name.
7. Press Enter. The selected name is returned to GUAHELP.

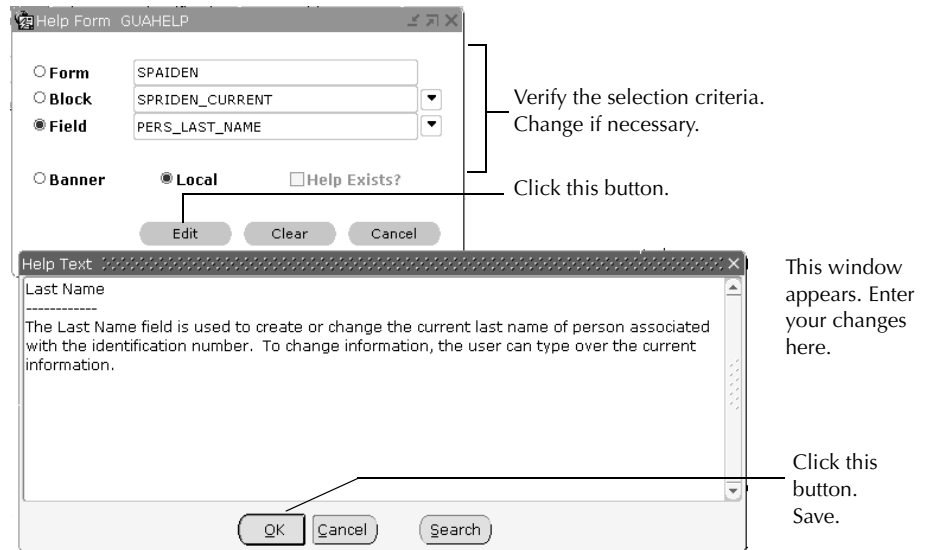
To enter or update Dynamic Help:

1. Select Help> Dynamic Help Edit. The Help Form (GUAHELP) appears. The default selection criteria indicate Local Dynamic Help for the current field.
2. Verify the default selection criteria. Change if necessary.
3. Select the Edit button or the Next Block function. The Help Text window shows help text for the requested item.
4. Enter your changes in the Help Text window.

You can use the Editor to modify text. See "Using the Editor" in chapter 4. You can search for a specific string of characters or replace a string of characters with another string (instructions follow).

5. Select the OK button in the Help Text window. The GUAHELP main window appears.

6. Select the Save function. A dialog box appears.
7. Select the OK button or press Enter.



To search for a string of characters:

1. Access Dynamic Help in query mode or in edit mode. The default selection criteria on the Help Form (GUAHELP) indicate Local Dynamic Help for the current field.
2. Verify the default selection criteria. Change if necessary.
3. Select the Edit button (edit mode), Display button (query mode), or Next block function. The Help Text window appears.
4. Select the Search button. The Search/Replace window appears.
5. Enter the search string in the **Search for** field.
6. Select the Search button. The Help Text window displays the area that contains the first occurrence of the search string.
7. (Optional) Continue selecting the Search button to find the next occurrence of the string.

To replace a string of characters:

1. Select Help> Dynamic Help Edit. The Help Form (GUAHELP) appears. The default selection criteria indicate Local Dynamic Help for the current field.

Note: You must access GUAHELP in edit mode.

2. Verify the default selection criteria. Change if necessary.
3. Select the Edit button or the Next block function. The Help Text window appears.
4. Select the Search button. The Search/Replace window appears.
5. Enter the search string in the **Search for** field.
6. Enter the replacement string in the **Replace with** field.
7. To replace the next occurrence of the string, select the Replace button. You can continue clicking the Replace button to replace each occurrence.

OR

To replace all occurrences of the string, select the Replace All button.

8. Respond to the dialog boxes (if displayed) to continue the search.
9. Select the Cancel button on the Search/Replace window.
10. Select the OK button on the Help Text window.
11. Select the Save function on the main window. A dialog box appears.
12. Select the OK button or press Enter.

Banner Documentation Bookshelf

The Banner Documentation Bookshelf is an easy way to access Banner documents directly from your computer. The Bookshelf includes both user and technical documentation. Documents in the Bookshelf appear in PDF (portable document format). They look the same as the hard copy versions, regardless of the computer you are using. You can print any document locally.

The Bookshelf can be downloaded to a central location at your institution, making it available for use by authorized users. Your system administrator can use the *Banner Documentation Bookshelf Getting Started Guide* to set up the Bookshelf.

In addition to the system setup, you must install Adobe Reader® on your computer. This software is freely available from Adobe and lets you read, print, and search the PDF files in the Bookshelf. Once you know the location of the Bookshelf at your institution, you can create a shortcut on your desktop to access it easily.

To create a desktop shortcut for the Bookshelf:

1. Open Windows Explorer.
2. Browse to the location where the Bookshelf directory is stored at your institution (*bdoc6x* or *bdoc7x*, depending upon the version of Banner you are using).
3. Right click *bkshlfxx.pdf* and choose *Create Shortcut*.
4. Drag the shortcut to your desktop.
5. (Optional) Rename it.
6. Double-click the icon to launch the Bookshelf.

To access a specific manual and chapter:

1. Open the Bookshelf.
2. In the left pane, click the bookmark in front of the product you want to access. The bookmark expands to show the product's documents.
3. If necessary, expand bookmarks in the left pane until you see the document or chapter you want to display.
4. Click the name of the document or chapter you want to display. The selected document or chapter appears in the right pane.

To set up your search preferences:

You can search for information in one or more documents. You must set up your preferences before you can search the Bookshelf. You only need to enter these setups once.

1. Open the Bookshelf.
2. Select File>Preferences>Search to display the Acrobat Search Preferences window.
3. Set up your preferences.
4. Click the OK button.

To attach indexes for the documents you want to search:

Before you can search a document, you must attach its index. You only need to attach a specific index once.

1. Determine where the index files are located (file extension *.pdx*). They are in the folder named *_indexXx*, where *X* is the release number. This folder is

located in the same folder as the Bookshelf files. Check with your data center personnel, if necessary.

2. Open the Bookshelf.
3. Select Search Indexes in the left pane. The Index Selection window appears with a list of the currently attached indexes.
4. Click the Add button. The Add Index window appears.
5. Select the index you want to attach. You may have to change directories to find it.
6. Click the Open button. The selected index is added to the Index Selection window.
7. Repeat steps 4 through 6 for each index you want to add.
8. Click the OK button in the Index Selection window.

To search for information:

Note: Adobe Reader must be loaded on your computer.

1. Open the Bookshelf.
2. Click the Search button in the Acrobat toolbar, or select Search Query in the left pane. The Adobe Acrobat Search window opens.
3. Enter the text you want to find.
4. Click the Indexes button. The Index Selection window appears.
5. Select the manuals you want to search.
6. Click the OK button in the Index Selection window. The Index Selection window closes.
7. Click the Search button in the Adobe Acrobat Search window.

If one file contains the requested text, the file appears. This procedure ends.

OR

If more than one file contains the requested text, the Search Results window appears with a list of the files that contain the requested text. Continue with step 8.

8. Select the file you want to display.
9. Click the View button. The selected file appears.

Help (Item Properties)

Help (Item Properties) lists all the properties of the current field. For example, you can find its internal database name, whether it is queryable, whether it is required, type of data (character or numeric), maximum length, and minimum and maximum values. See your Oracle documentation for information on each item property.

To display Help (Item Properties) for a field:

1. Place the cursor in the field.
2. Select the Help (Item Properties) function.

Show Keys

Show Keys lists the Oracle functions and associated keystrokes available in your environment for the current field, window, and form. Specific keystrokes for a function depend on your environment.

To display Show Keys:

Select the Show Keys function.

Auto Hint

The auto hint at the bottom of the form can contain the following information for the field where the cursor is located:

- Brief field description
- Error and processing messages
- Keyboard equivalents (if you can access other blocks, windows, or forms from the field)

Using the Editor

The editor is a tool that helps you enter, update, and view information in a data field. For example, you can use the editor to enter, update, and view Dynamic Help text on the Help Form (GUAHELP).

Some data fields are actually longer than they appear on the form. With the editor, you can expand a data field to display a larger, freeform window where it is easier to read or enter more data. The size of the window depends on the defined length of the field.

To expand a data field:

1. Place the cursor in the field you want to expand.
2. Select the Edit function. A freeform window appears.

Note: Some data fields have a Comment button that you can click to open the freeform window.

To select text:



1. Click on one side of the text you want to select.
2. Drag the cursor to the other side of the text you want to select.
3. Release the mouse button. The selected text is highlighted.



1. Use the arrow key to move to one side of the text you want to select.
2. Hold down the Shift key as you use the arrow key to move to the other side of the text you want to select. The selected text is highlighted.

To insert text:



1. Click where you want to insert the text.
2. Enter the new text.



1. Use the arrow key to move to where you want to insert the text.
2. Enter the new text.

To replace text:

1. Select the text you want to replace.
2. Enter the new text. The new text replaces the existing text.

To copy text and save it on the clipboard:

1. Select the text you want to copy.
2. Select the Copy function. The text remains in its current location and is copied into an invisible clipboard.

To cut text and save it on the clipboard:

1. Select the text you want to cut.
2. Select the Cut function. The text is deleted from its current location and is copied into an invisible clipboard.

To paste text from the clipboard:

1. Place the cursor where you want to paste text.
2. Select the Paste function. Text from the clipboard is inserted.

To delete text:

1. Select the text you want to delete.
2. Press Delete.

To search for text:

1. Expand the data field. A freeform window appears.
2. Select the Search button. The Search/Replace window appears.
3. Enter the search string in the **Search for** field.
4. Select the Search button. The window displays the area that contains the first occurrence of the search string.
5. Respond to the dialog boxes (if displayed) to continue the search.
6. Select the Cancel button on the Search/Replace window.
7. Select the OK button on the freeform window.
8. Select the Save function on the main window. A dialog box appears.
9. Press Enter.

To replace text:

1. Expand the data field. A freeform window appears.
2. Select the Search button. The Search/Replace window appears.
3. Enter the search string in the **Search for** field.
4. Enter the replacement string in the **Replace with** field.
5. To replace the next occurrence of the string, select the Replace button. You can continue clicking the Replace button to sequentially replace the next occurrence.

OR

To replace all occurrences of the string, select the Replace All button.

6. Select the Cancel button on the Search/Replace window.
7. Select the OK button on the freeform window.

Banner Messaging

If you have the appropriate security, you can send messages to and receive messages from other Banner users. Messages are created and viewed on the General Message Form (GUAMESG).

When you have a new message to view, a checkmark appears next to the Check Banner Messages link on the main menu. You can select this link at any time to view messages, or go directly to the General Message Form (GUAMESG) from another form in Banner using Direct Access or some other method.

In addition to individual messages, Banner has the ability to display broadcast messages for all Banner users. These messages appear near the bottom of the main menu. When there is a new broadcast message, the Broadcast Message button on your toolbar becomes enabled, and takes you to the main menu when clicked.

Note: Users assigned to the *Broadcast* security object can send broadcast messages to all users. To send a broadcast message, create it on GUAMESG as usual, and choose *BASELINE* as the recipient.

Chapter 5 Customization

Customizing Banner

You can customize Banner to meet your individual needs. For example, you can:

- Create a personalized menu with My Banner
- Choose what information appears in title bars
- Specify whether form names are displayed on menus
- Customize the appearance of the main menu

My Banner

My Banner includes the forms, jobs, menus, and QuickFlows that are most important in your daily work. You can access My Banner from the main menu. It is tied to your Oracle user ID.

The following forms are used to create and copy My Banner menus:

- The My Banner Maintenance Form (GUAPMNU) lets you create and change My Banner.
- The My Banner Maintenance and Copy Form (GUTPMNU) lets you copy a My Banner menu to or from another user.

Making Changes to My Banner

There are several ways to add Banner objects to My Banner:

- Scroll through the object list to find what you want to add
- Enter the name of the object
- Query the object list to narrow your search

You can also delete objects from My Banner either one at a time or all at once.


To use the object list to add an object to My Banner:

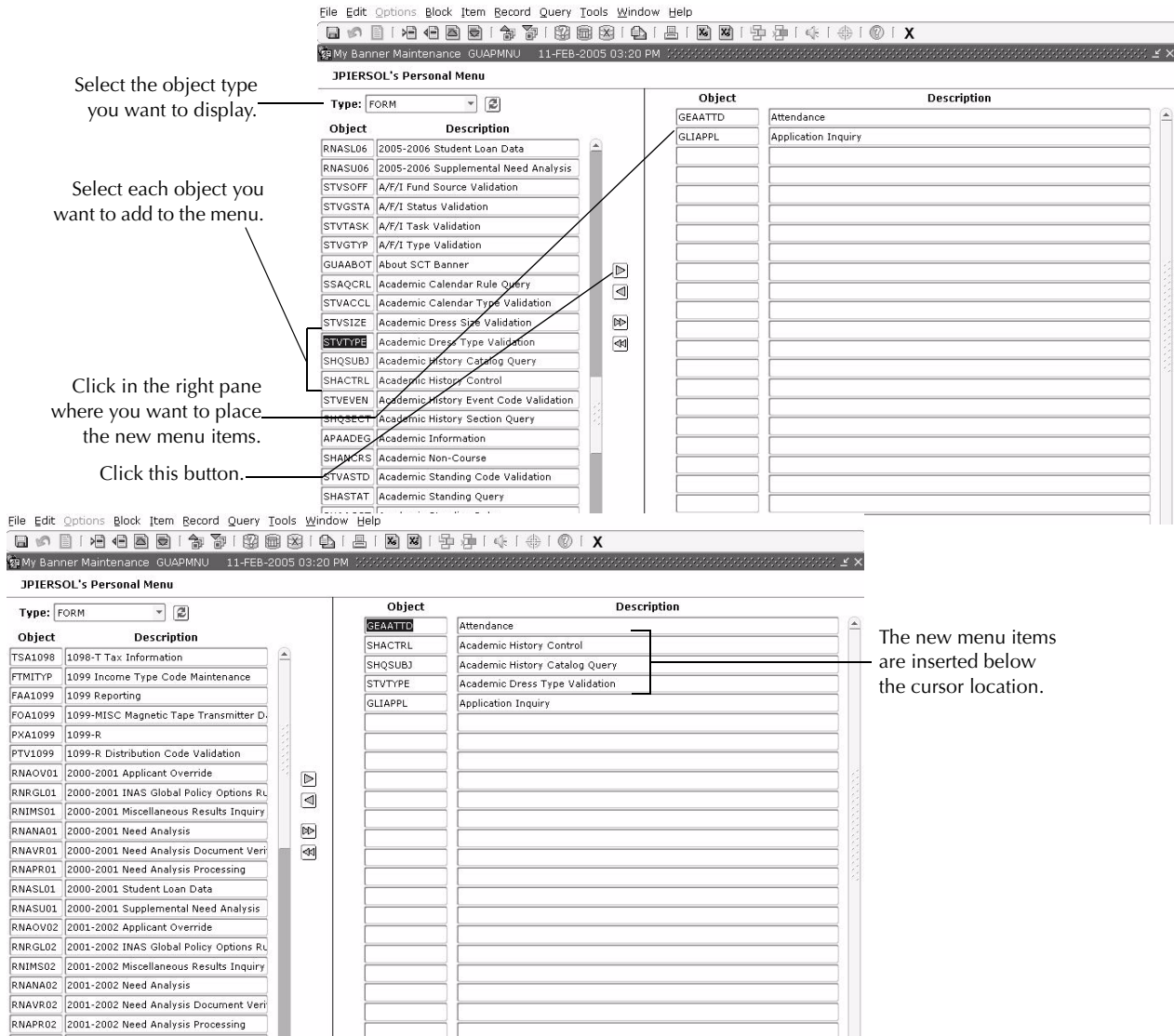
1. Access the My Banner Maintenance Form (GUAPMNU).
2. Use the pull-down list above the left pane to select the object type you want to display. The left pane lists the objects of the selected type.

Note: You can query to reduce the object list. See the instructions later in this chapter.

3. In the left pane, select each object you want to add to the menu by double-clicking it. When you select an object, the name is highlighted.
4. *(Optional)* Repeat steps 2 and 3 for each object type you want to add to the menu.

Note: You can select objects from multiple object types (for example, a form and a menu) and insert them all at one time.

5. Click in the right pane where you want to place the new menu items.
6. Click the Insert Selection button in the middle of the form . The selected objects are added to the right pane below the place you clicked.
7. *(Optional)* Change the object descriptions.
8. Save.



To add an object to My Banner if you know the object's name:

1. Access the My Banner Maintenance Form (GUAPMNU).
2. Place the cursor in a blank **Object** field in the right pane.
3. Enter the object's name.
4. Press Enter. The object's type, description, and name appear in the right pane.
5. (Optional) Change the object description.
6. Save.

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

Object	Description
GEAATTD	Attendance
GLIAPPL	Application Inquiry
GUAURF	


If you know the object's name, enter the object name in a blank **Name** field and press Enter.

To query objects and add to My Banner:


Use these steps to reduce the list of object names in the left pane. You can add any or all of the matches to My Banner.

1. Access the My Banner Maintenance Form (GUAPMNU).
2. Use the pull-down list above the left pane to select the object type you want to query.
3. Place the cursor in the left pane.
4. Select the Enter Query function. The object list disappears.
5. Enter the search criteria.

You can use the Oracle wildcards % and _. Capitalization matters. Data is matched against the search criteria exactly as you enter them.

6. Select the Execute Query function. The left pane lists the matching objects.
7. To add all matches to the menu (if there are 20 matches or less), click in the right pane where you want to place the new menu items. Then click the Insert All button in the middle of the form .

OR

To add selected matches to the menu, select the objects in the left pane by double-clicking each one. Click in the right pane where you want to place the new menu items. Then click the Insert Selection button in the middle of the form .

8. Save.

Select the object type you want to query.

Place the cursor in the left pane.

Select Enter Query.

Enter the search criteria.

Select Execute Query.


The form displays all matching objects.

Select individual objects:
Select the objects, click in the right pane, and click this button.

To select all objects (20 or less):
Click in the right pane, and click this button.

Objects appear on your My Banner menu.

To delete selected objects from My Banner:

1. Access the My Banner Maintenance Form (GUAPMNU).
2. In the right pane, select each object you want to delete by double-clicking it. When you select an object, the name is highlighted.
3. Click the Remove Selection button in the middle of the form . The selected objects are deleted.
4. Save.

My Banner Maintenance GUAPMNU 11-FEB-2005 03:20 PM

JPIERSOL's Personal Menu


Type: FORM

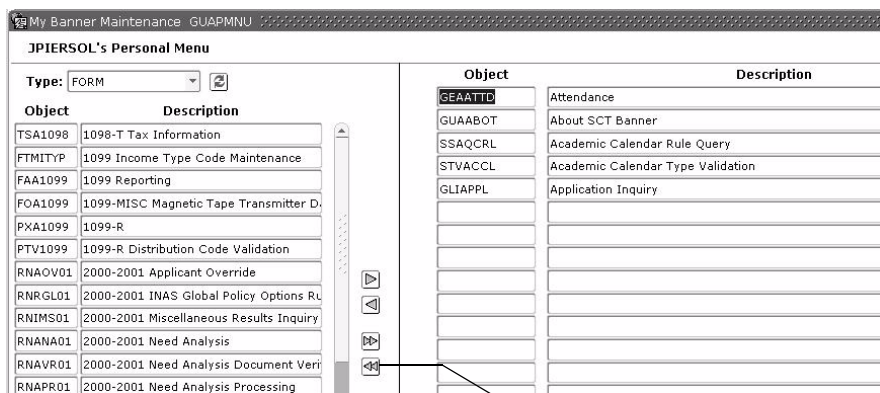
Object	Description	Object	Description
TSAA1098	1098-T Tax Information	GEAATTD	Attendance
FTMITYP	1099 Income Type Code Maintenance	GXADIRD	Direct Deposit Recipient
FAA1099	1099 Reporting	GXATPID	EDI Trading Partner Identification
FOA1099	1099-MISC Magnetic Tape Transmitter D.	SLIAPPL	Application Inquiry
PXA1099	1099-R		
PTV1099	1099-R Distribution Code Validation		
RNAOV01	2000-2001 Applicant Override		
RNRGL01	2000-2001 INAS Global Policy Options Ru		
RNIMS01	2000-2001 Miscellaneous Results Inquiry		
RNANA01	2000-2001 Need Analysis		
RNAVR01	2000-2001 Need Analysis Document Veri		
RNAPR01	2000-2001 Need Analysis Processing		

Select each object
you want to delete
from the menu.

Click this button.

To delete all objects from My Banner:

1. Access the My Banner Maintenance Form (GUAPMNU).
2. Click the Remove All button in the middle of the form .
3. Save.



Click this button to
delete all menu items.

To change the location of an object in My Banner:

1. Access the My Banner Maintenance Form (GUAPMNU).
2. Delete the object from the menu (see the instructions on page 5-7).
3. Add the object to the menu in its new location (see the instructions on page 5-4).
4. Select the Save function.

To customize a lower level menu on My Banner:

1. Access the My Banner Maintenance Form (GUAPMNU).
2. Select the menu in the right pane by double-clicking it.
3. Perform a Next Block function. Contents of the menu appear in a new window.
4. Use the normal techniques to add to, change, and delete from the menu.
5. Save.

My Banner Maintenance GUAPMNU

JPIERSOL'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 Ru
RNIMS01	2000-2001 Miscellaneous Results Inquiry

Object	Description
GEAATTD	Attendance
*AHISTORYA	Academic History Process Control
GUAABOT	About SCT Banner
SSAQCL	Academic Calendar Rule Query
STVACCL	Academic Calendar Type Validation
GLIAPPL	Application Inquiry

Select the menu.

Perform a Next Block function.

My Banner Maintenance GUAPMNU

JPIERSOL's Personal Menu \ Academic History Process Control

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 Ru
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
RNASU01	2000-2001 Supplemental Need Analysis

Object	Description
SHAGRDE	Grade Code Maintenance
SHAGRDS	Grade Substitution Maintenance
SHAACST	Academic Standing Rules
SHAGCOL	Grade Mailer Status/Error Correction
SHARPTR	Repeat/Multiple Course Rules
SOACTRM	Continuant Terms Rule
SHACTRL	Academic History Control
SHAGEDI	EDI Academic Grade Qualifier
SHAGRUL	Grade Book Rule Definition
SHARTYP	Rule Type Definition
SHARPAR	Grade Book Rule Parameter Definition
SHAGPAR	GPA Display Rules
*CURRIC	Curriculum Rules and Control

Contents of the menu appear in a new window.

Use normal techniques to add to, change, and delete from the menu.

To copy a My Banner:

1. Access the My Banner Maintenance and Copy Form (GUTPMNU).
2. Use the **User** pull-down list to select the My Banner you want to copy. The selected My Banner appears in the right pane.
3. (Optional) Use the normal techniques to add to, change, and delete from the menu before it is copied. If you want to change the original menu, select the Save function. If you want the changes to affect the copies only, do not select the Save function.
4. Click the Display Users button. A list of IDs appears.

5. Click the Copy button in the middle of the form. A list of user IDs appears in the left pane.
6. *(Optional)* To reduce the list of IDs, enter a partial ID in the field above the left pane. Start with the first character and enter as many characters as you know. Press Enter.
7. Select each user ID to receive the copied menu by double-clicking it. When an ID is selected, it is highlighted.
8. Click the Copy to User(s) button.
9. If any of the IDs already has a My Banner, a dialog box asks if you want to overwrite existing My Banners.
 - To overwrite all selected My Banners, click the Yes button.
 - To review each ID before deciding, choose the No button. A dialog box appears for each ID that already has a My Banner. Choose Yes to overwrite the old menu, or No to keep the old menu for the ID.

When the menus are copied, a message tells you how many menus were copied successfully.

My Banner Maintenance and Copy GUTPMNU

User: CNORRIS

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 Ru
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
RNASU01	2000-2001 Supplemental N
RNAOV02	2001-2002 Applicant Overr
RNRGL02	2001-2002 INAS Global Pol

Object **Description**

APASBIO	Advancement Individual Summary
ADADESG	Designation
AMAINFO	Advancement Prospect Information
AGCPLDG	Pledge List
AGCGIFT	Gift List
APAIDEN	Advancement Identification
APACONS	Advancement Individual Information
AOAORGN	Advancement Organization Header

Select the My Banner you want to copy.

Contents of the My Banner appear in the right pane.

Add to, change, and delete from the menu, if necessary, before copying.

Click this button.

A list of user IDs appears in the left pane.

My Banner Maintenance and Copy GUTPMNU

User: CNORRIS

Search:

User Name **User ID**

ALUMNI_TRACE	245
ALUMNI_USER	222
ALUWEB_TRACE	246
AMACDONA	181
ANONYMOUS	36
APITCHAI	135
APOLISKI	104
APPWORKX	453
AQ	319
AQADM	316
AQUSER	317
AROLLAG	371
ARSYS_TRACE	244
ARSYS_USER	216
ASMITH	374
ASOROKA	262
AYELURI	
BANCOMPILE	

If you want to reduce the list of IDs, enter search characters and press Enter.

Select each user ID to receive the copied menu.

Click this button.

My Banner Maintenance and Copy GUTPMNU

User: CNORRIS

Search: R

User Name **User ID**

RALLOO	129
RHENNESS	130
RKEVITCH	260
RKUMAR	114
RMAHIMAI	444
ROMOYER	337
RPEREZ	205
RROBINSO	375
RROTHERM	190
RRULLO	331
RVENKATE	136
RWISSERT	290
RZELLEFR	124

Object **Description**

APASBIO	Advancement Individual Summary
ADADESG	Designation
AMAINFO	Advancement Prospect Information
AGCPLDG	Pledge List
AGCGIFT	Gift List
APAIDEN	Advancement Identification
APACONS	Advancement Individual Information
AOAORGN	Advancement Organization Header

Title Bar Display Options

You can choose to display any or all of the following in title bars:

- Form names
- Release numbers
- Database instances

To select information for your title bars:

1. Access the General User Preferences Maintenance Form (GUAUPRF).
2. Click the Form Display Options button.
3. Select or clear the display options, depending on the information you want to see on your form title bars.
4. Select the OK button. A dialog box says you must exit and restart Banner to see the changes.
5. Select the OK button in the dialog box.
6. Exit Banner.
7. Restart Banner to see your changes.

Displayed Form Names

You can choose whether form names are displayed in the following places:

- Options pull-down menu
- Left pane of menu maintenance forms
- List of open windows on the Window pull-down menu

To display or hide form names:

1. Access the General User Preferences Maintenance Form (GUAUPRF).
2. Choose the Display Options tab.
3. Check the **Display Form Name on Title Bar** check box to display the form name, or clear the check box to hide it.
4. Save.
5. Exit the form.

Note: A change to this display option, as well as to the release number or database instance, occurs immediately. You do not need to exit Banner. However, if you change any other display options, you must exit and restart Banner to see the changes.

Customizing the Main Menu

You can customize the Banner main menu in several ways:

- Specify the default expanded menu that appears when you log in
- Create My Links for frequently used Banner objects or external web sites

Note: Changes to Banner colors will not appear on the main menu until you log out and log back in.

Default Expanded Menu

The Banner main menu appears when you first access Banner. You can change the default product menu that is expanded to suit your personal preference.

To specify the default expanded menu:

1. Access the General User Preference Maintenance Form (GUAUPRF).
2. Choose the Menu Options tab.
3. In the **User Default** field, enter the name of the menu that you want as the default, or click the Search button to search for it using the Object Search Form (GUIOBS).
4. Save your changes.

My Links

You can create a link from the main menu to a web site or Banner object using Personal Links. Make sure you do not have pop-ups blocked with any third-party software. Pop-up blockers can interfere with the performance of your personal links.

To create a link:

1. Go to the General User Preferences Maintenance Form (GUAUPRF).
2. Choose the My Links tab.
3. Enter a description of your link in the **User Value** field associated with the first personal link description.
4. Enter the URL or Banner object name in the **User Value** field associated with the first personal link URL or Banner object.

5. Save. You must exit Banner and log back in to see your changes.

Note: You can create up to six personal links. Each personal link is comprised of two records—the description and the URL/object. Make sure the description record matches the corresponding URL or Banner object record. The following example illustrates a personal link for a weather web site.

<i>Field Name</i>	<i>Name of Your Link</i>	<i>URL or Banner object</i>
Description	Enter the description for the “My Personal Link 1” link.	Enter the URL or Banner object for the “My Personal Link 1” link.
Default Value	Your first personal link description	Your first personal link URL or Banner object
User Value	My weather page	www.weather.com

Changing Your Alerts

Alert options enable you to customize how you are prompted by Banner in certain situations. Access the Display Options tab on GUAUPRF to customize any of the following:

- Check the **Prompt Before Exiting Banner** check box if you want Banner to verify that you want to quit the Banner session before exiting.
- Check the **Display Additional Confidential Alert** check box if you want Banner to display an extra *Confidential* pop-up message for records that contain confidential information.
- Check the **Display Additional Deceased Alert** check box if you want Banner to display an extra *Deceased* message for records associated with a deceased person.

Changing Your Banner Password

The Change Banner Password link goes to the Oracle Password Change Form (GUAPSWD), where you can change your password.

Changing Your Banner Colors

You can customize your colors for Banner via the General User Preferences Maintenance Form (GUAUPRF). Custom colors can be specified at the site level, by logging in as the baseline user and changing the values in the **Default Value** fields, and also at the individual user level, by changing the values in the **User Value** fields.

You can customize the color of the following items:

- Buttons, such as Cancel and OK (buttons in the toolbar are not included).
- Canvas 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 of an item at the user level:

1. Go to User Interface Color Settings on the Display Options tab.
2. In the **User Value** field for the item you want to change, choose a color.

Note: You can select a pre-defined color from the palette, or create your own shade by using HSB (Hue Saturation Brightness) or RGB (Red Green Blue) values.

3. Select OK.
4. Save.

Note: SunGard Higher Education delivers the default values as seed data. If you change the default colors as the baseline user, all users who have not set colors at the individual user level will see the baseline colors you selected.

Optimal Screen Resolution

Standard screen resolution of 1024x768 allows ample room for displaying user interface components in Banner.

If you have the Display Properties>Appearance of your workstation set to Windows XP style, you may see horizontal or vertical Windows scrollbars. If you want to eliminate the scrollbars, you can use any of the following techniques:

- On the workstation, set the Display Properties>Appearance to Windows Classic style.
- On the workstation, leave the display properties as Windows XP style, but go to Display Properties>Settings>Advanced and choose a Custom DPI setting of 95 DPI, which is 99% of the normal size.
- On the workstation, leave the display properties as Windows XP style, but go to Display Properties>Settings>Advanced, select the Active Title Bar item from the **Item** pull-down list, and enter a value of *18* in the corresponding **Size** field. Enter a value of 8 in the **Size** field for the font.
- Use the Windows XP style on the workstation, but have your site administrator establish a Banner URL configuration that sets the client DPI value to 95. This method eliminates the need for users to change their individual workstation settings.

Chapter 6 Tips and Tricks

This section contains some of SunGard Higher Education consultants' favorite tips for using Banner and teaching new users about it. A few of the tips that appear in this chapter are also described in more detail elsewhere in the handbook.

Shortcuts for Entering Information

<i>Topic</i>	<i>Tip /Trick</i>
System date	In most date fields, entering a single, non-numeric character followed by Enter or Tab will display the current date. It's easy to remember <i>T</i> for <i>Today</i> , or <i>S</i> for <i>System Date</i> . Even special characters work for this shortcut. Forget what today's date is? Enter a question mark and Banner will tell you.
Dates within the current month	If you enter a two-digit number in a date field, Banner assumes the current month and year. For example, if the month is May and the year 2005, 10-MAY-2005 has the shortcut <i>10</i> .
Dates within the current year	If you enter a four-digit number in a date field, Banner assumes the current year. For example, if the year is 2005, 15-JUN-2005 has the shortcut <i>0615</i> .
Populating records on forms	After entering the SSN, click in the first enterable field, and the record will be populated. Note: This shortcut works for about 80% of forms. Remember that you proceed out of the key block by performing a Next Block function.

Navigation Shortcuts from the Main Menu

<i>Topic</i>	<i>Tip /Trick</i>
Shortcuts in the Go To field	<p>Enter <i>SITE</i> to navigate to the site map.</p> <p>Enter <i>TREE</i> to navigate from the site map to the product tree.</p> <p>Enter <i>REFRESH</i> to:</p> <ul style="list-style-type: none"> • Refresh your personal menu (My Banner) after making changes on GUAUPRF • Return to the Banner menu even if you are buried deep inside other menus • Refresh the site map <p>Press the up or down arrow keys to navigate to any of the last 10 forms you accessed.</p> <p>Enter the menu name to expand that menu.</p> <p>Example: *GENJOB</p> <p>Expands the General JOBSUB directory.</p> <p>Enter <i>EXIT</i> to end your Banner session.</p> <p>Enter the Quickflow name to automatically open the first form in the Quickflow.</p> <p>Enter a job name and GJACPTL will open and run it.</p> <p>Enter <i>*PERSONAL</i> to open the My Banner menu.</p> <p>Enter <i>*MENU</i> to open the Banner menu no matter where you are.</p>

Other Navigation Shortcuts

<i>Topic</i>	<i>Tip /Trick</i>
Rollback	The Rollback function clears out the record and takes you back to the key block, so you can take another snapshot from the database or enter another ID number.
Shortcut to calendar or calculator	Double-clicking in a number or date field will display the calculator or calendar, respectively.

Queries

<i>Topic</i>	<i>Tip /Trick</i>
Enter/exit query sequence	You must always perform an Enter Query function before performing an Execute Query function. Even if the form is blank when you access it, you must ensure it is in Enter Query mode.
Re-executing a query	If you have not selected a record after your query, and wish to execute another, you can perform two Enter Query functions in a row, and Banner will retrieve the last set of query criteria you executed.
Wildcards	The character <code>_</code> represents a single character in your query, while the character <code>%</code> represents any number of continuous characters.

Logging In/Out

<i>Topic</i>	<i>Tip /Trick</i>
Enter login information all on one line	<p>When logging in, you can enter the username and password all on one line.</p> <p>For example:</p> <p>Username: rsmith/yourpassword</p> <p>instead of</p> <p>Username: rsmith</p> <p>Password: yourpassword</p> <p>Note: If you enter your password in the Username field along with your name, your password will be visible.</p>
Enter <i>EXIT</i> to quit Banner	Enter <i>EXIT</i> in the Go To field on the main menu to end your Banner session.
Eliminate extra prompt before exiting	Clear the Prompt Before Exiting Banner check box on the Display Options tab of GUAUPRF to eliminate the extra message that verifies whether you want to quit prior to ending your Banner session.

Error Messages

<i>Topic</i>	<i>Tip /Trick</i>
GUAERRM appears	If the Banner Error Messages Form (GUAERRM) appears, then the error resulted from an API. This information can be helpful when trying to resolve the error with your system administrator.

Miscellaneous

<i>Topic</i>	<i>Tip /Trick</i>
Names are formatted differently across Banner products	Names in the Name fields on Banner forms may be formatted differently across Banner products. This is due to different functional areas at your institution having different needs for displaying and working with name data.
Quick and easy pie chart	<p>Go from a Banner form to a pie chart in four mouse clicks. From the Help pull-down menu on the main menu, choose the Extract Data No Key option to create a .csv file that can be opened and formatted using a spreadsheet program.</p> <p>Not all forms have a data extract option. Query the Data Extract Option field on GUAOBS to determine the forms for which it is available.</p>
Best information about new functionality	<p>You will generally find the best information about new functionality in the release guide where it was first introduced, or when available, in a handbook specific to a topic (especially when it involves multiple product areas).</p> <p>Ask your IT department for the latest release guides when they are available.</p>

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