



INFORMATION TECHNOLOGY
Enterprise Application Systems

Banner Basic Navigation Guide

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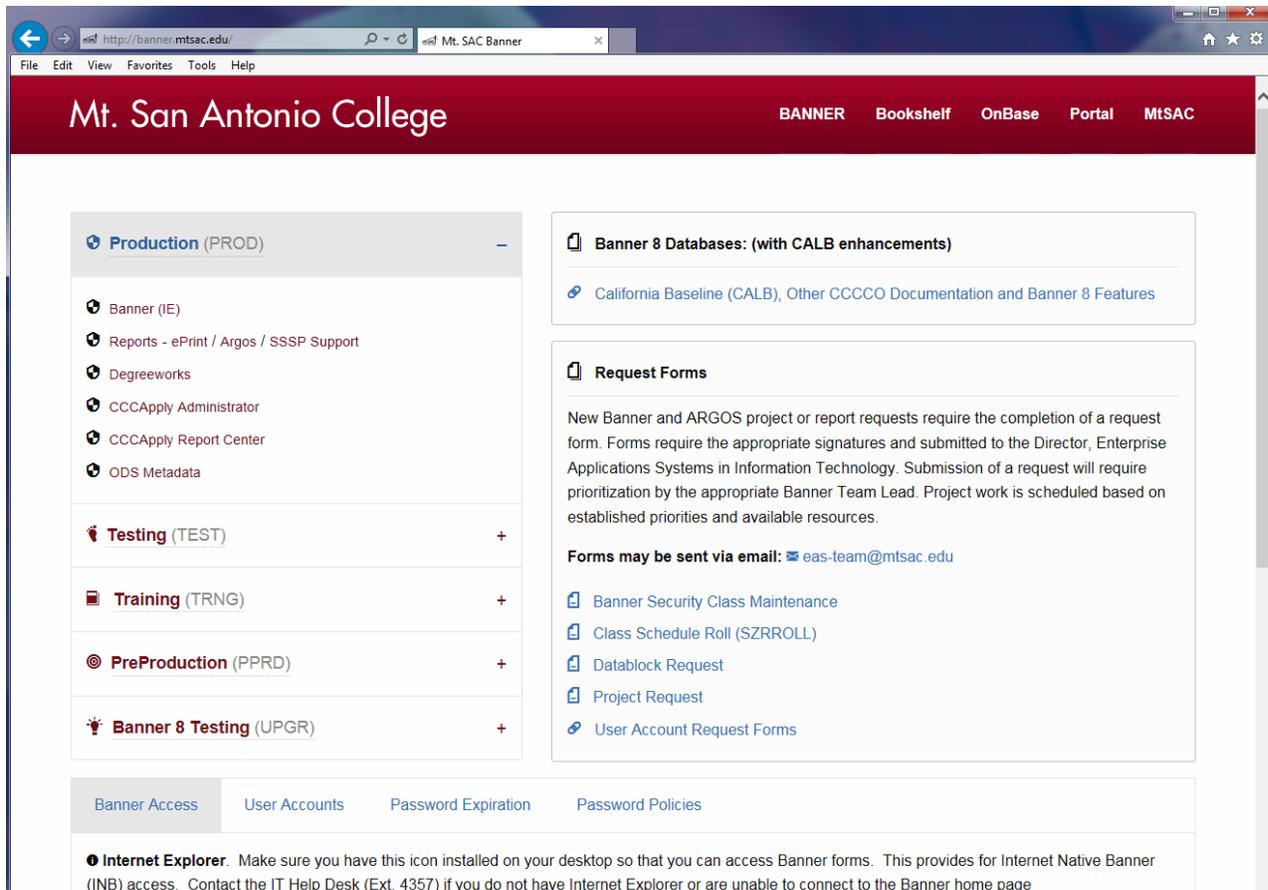
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Accessing Banner

There are two different methods to access the Banner databases.

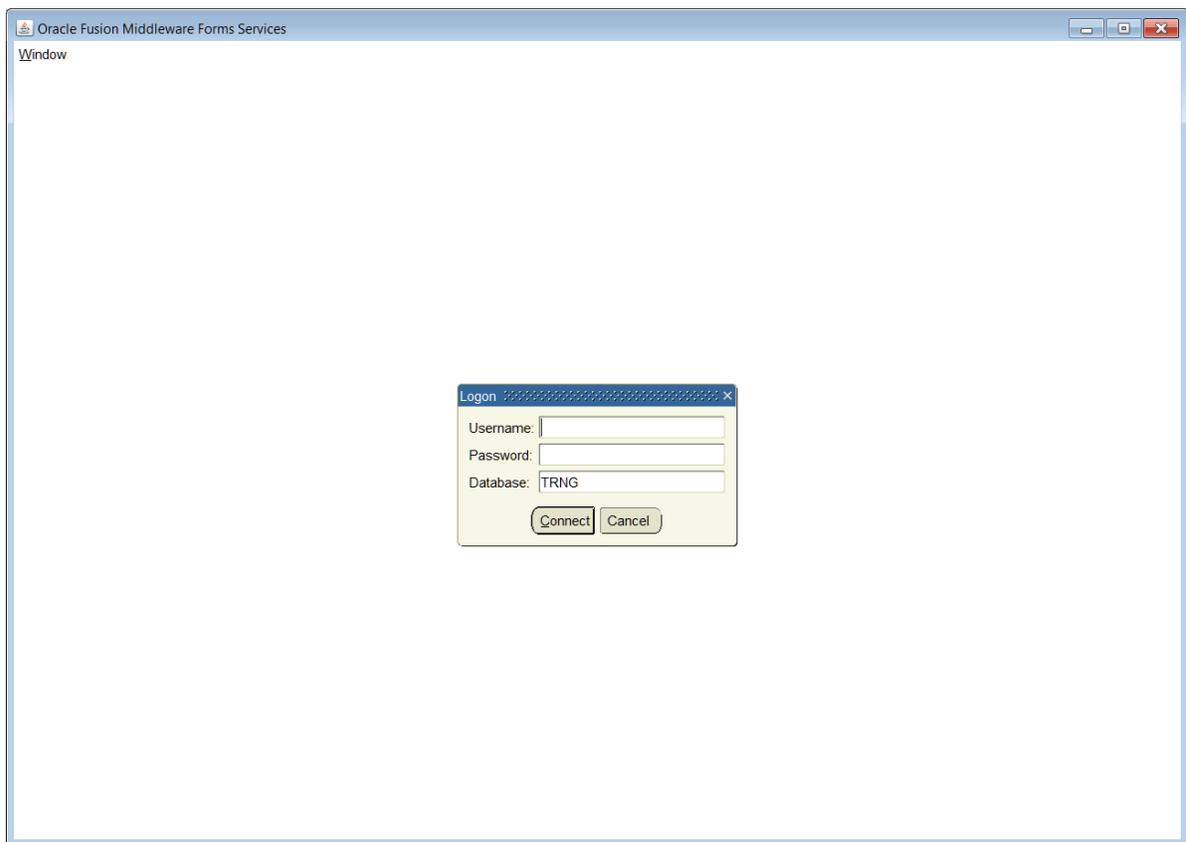
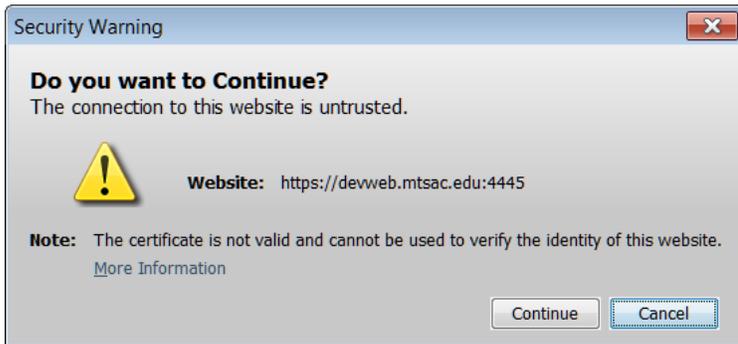
1. Double click the shortcut icon on your computer desktop to display the Mt. SAC/Banner Portal.
2. Type the following URL <http://banner.mtsac.edu> in your computer internet browser, then press **Enter** to display the Mt. SAC/Banner Portal.



How to Logon to Banner

There are several modules under the Login column on the side of the Home screen, Production (PROD), Testing (TEST), Training (TRNG), PreProduction (PPRD) and Banner 8 Testing (UPGR).

1. Click on the module you want to work on, usually Production (PROD) unless you were asked to test (TEST) and for training we would use (TRNG).
2. After selecting and clicking on the appropriate module, several security message windows will appear. Click on **continue**, check the “I accept the risk and want to run this application” box then click **Run** and the Logon window will come out.



3. Enter your Banner user ID and password. There is no need to specify database since it has been assigned on the corresponding Banner module screen.
4. Press the **Enter** key or click **Connect** and when Banner connects you will be on the program's main menu GUAPMNU.

Important: Even though the first window looks blank, it is needed to run Banner. **DO NOT USE THIS WINDOW!** If you need to use the internet, you have to open a new Internet Explorer tab or window or another session by clicking on the IE icon.



Banner Main Menu

The main menu GUAPMNU is the starting point for navigating through Banner.

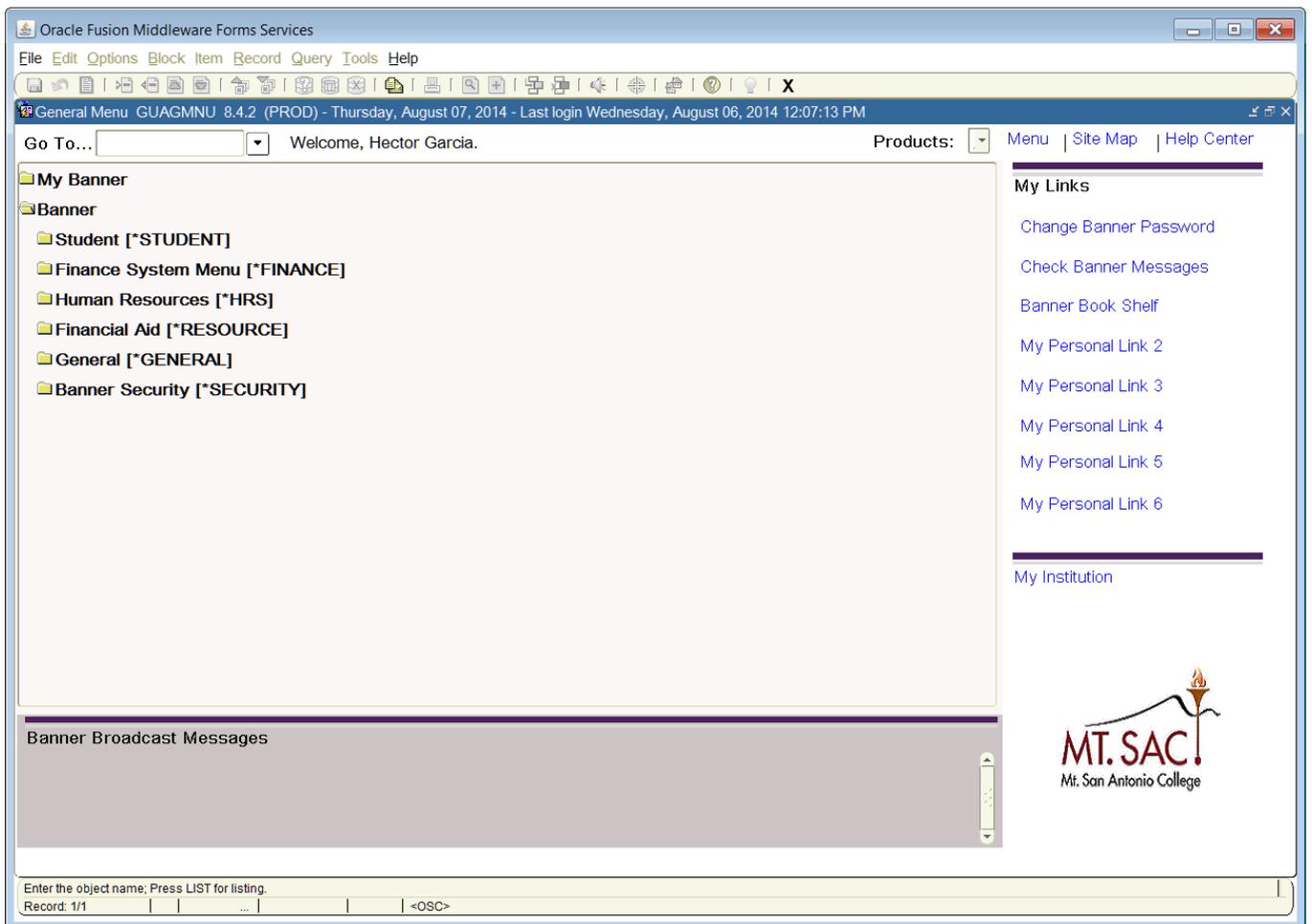
The Banner menu has the familiar Windows GUI interface and it includes the standard menu items.

Title Bar: Lists the name of the program (Banner Internet Native).

Menu Bar: Allows you to access pull-down menus (greyed out items not available sometimes).

Tool Bar: Access to commonly-used features. Pointing at an icon on the toolbar causes a pop up term to display telling you what the icon is for.

Links: My Links is located to the right side of the screen with Standard blue colored letters. My Links has several preprogrammed links, such as “Change Banner Password” and “Banner Bookshelf”. Also there are several links that you can customize and be programmed to go to another website or a favorite form in Banner.

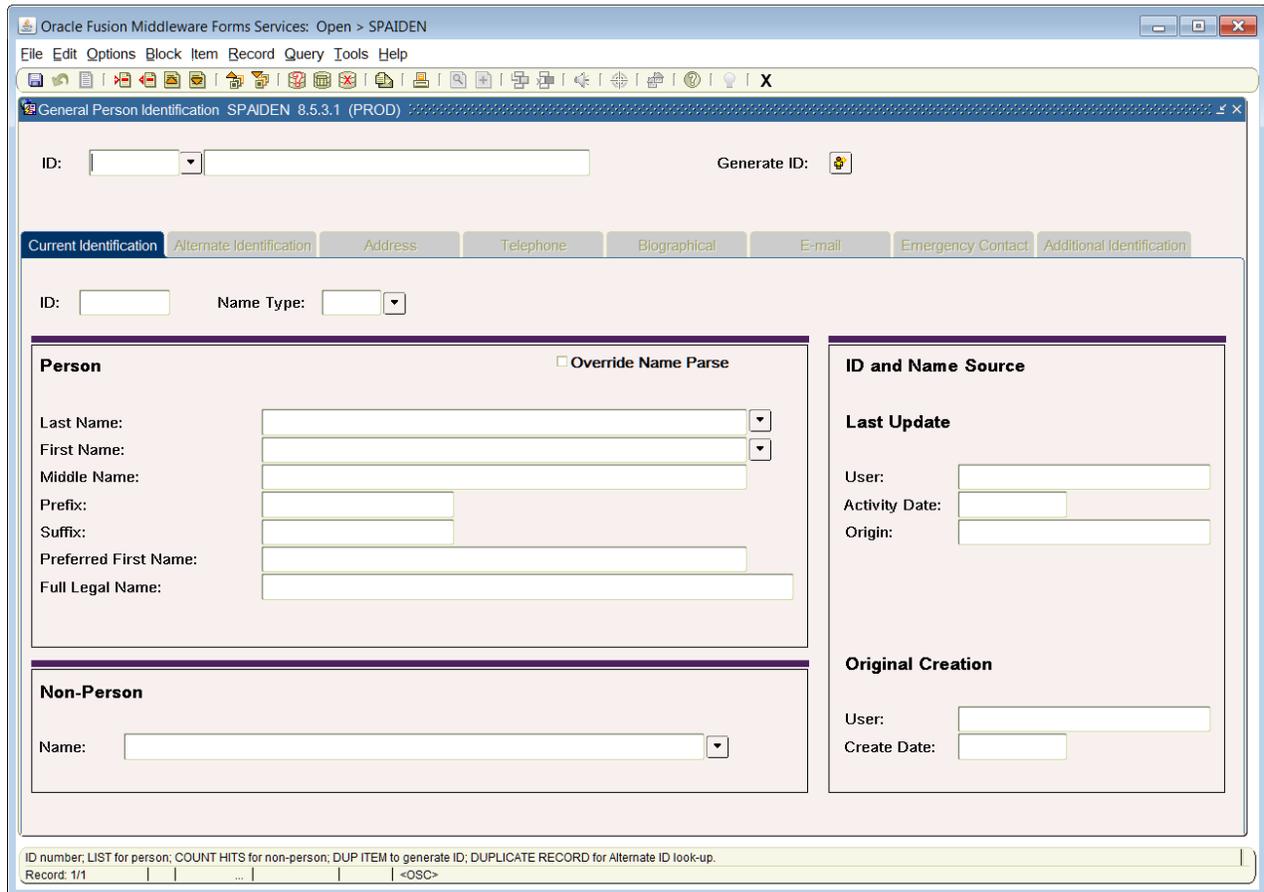


*You can use the menu hierarchical structure to access a form, job or menu. Or you can use the **Go To** box (Direct Access) to access a specific form if you know the form’s name.*

Banner Forms

A form is an online document where you can enter and look up information in your database. Banner uses many types of forms to enter and access information. A form can be accessed through several ways.

Parts of the Form



Part	Description
Title Bar:	The form's descriptive name, 7 character name, Version number, database name, date and login information.
Menu Bar:	Allows you to access pull-down menus (greyed out items mean not available with that option).
Tool Bar:	The Banner toolbar contains buttons that perform common functions. It is located directly under the menu bar and when you move your cursor over a button and pause, the cursor displays the function of the button.
Auto Hint:	The auto hint contains the field description, error and processing messages, keyboard equivalents, if you can access other blocks, windows, or forms from the field where the cursor is located.
Status Line:	The status line directly under the auto hint can contain one or more messages:

Form Components

All Banner Forms are made up of three components: Records, Fields, and Blocks.

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

Fields: An area in the form where you can enter, query, change or display information.

Records: 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.

Banner Naming Convention

Every form has a 7 character name. Most of the time, forms are referred by this 7 character form name and the following table would help you understand the basic idea behind the naming convention.

Position 1	Position 2	Position 3	Position 4-7
Identifies the primary system owning the form, report, job or table	Identifies the module owning the form, report, job or table	Identifies the type of form, report, job or table	Identifies an unique four-character code for the form, report, job or table
S	P	A	IDEN
Student	Person	Application Form	Identification
S	P	A	PERS
Student	Person	Application Form	Personal Information
S	S	A	PREQ
Student	Schedule	Application Form	Prerequisite
F	T	M	VEND
Finance	Table	Maintenance	Vendors
F	P	A	ABUY
Finance	Purchasing	Application Form	Buyer Assignment

Types of Forms

You will use Banner forms to enter, update, and query information. The types of forms you use most are Application, Query, and Validation forms.

Accessing Forms

Accessing through Menus Folders

Hierarchical Menu

- Double click on the STUDENT folder. This opens the folder and shows you more folders within the student system.
- Double click on the General PERSON folder. This opens the folder and shows you the contents in that folder are forms. Note the form icon is different from the folder icon.
- Double click on the form: General Person Identification [SPAIDEN]
- This opens the form SPAIDEN.

Go To box

If you know the 7-character name, you can type it in the “Go To” box and press enter. This will take you to the form immediately.

Shortcut: Click inside the “Go To” field using your up or down arrow on your keyboard cycle through the last forms you have been in, select one you want and press Enter.

Direct Access

Select File>Direct Access or click **F5** to open a Go To menu while in a form.

Shortcut click File on the menu bar, the forms you have been since you login will show up (last 10 forms). When you close the program down, the list will clear out.

Bread crumbs

The bread crumb trail allows you to trace your path back and find the form(s) you currently are.

Oracle Fusion Middleware Forms Services: Open > SPAIDEN - SOAIDEN - GUIOBJJS

Object Search

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

1. Double-click the Go To field on the main menu or you can also use the Search button or Select File>Object Search from any form.
2. Enter your search criteria on the Object Search Form (GUIOBJJS) then run query (F8).

You can use any or all of the Name and Type fields together with the wildcards % and _.

Site Map

The site map is accessible by selecting the site map link [Site Map](#) from the main menu. It will list the top-level menus and one level below them but not fields just links to menus and forms.

Options Menu

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 while other options take you outside the current form to related forms.

Search Query

Person Search

Most users will at some point, perform a search or query within Banner. Searchable fields have a drop down arrow next to them. When the icon is clicked, either a list menu or a search form opens.

1. Enter ID (Banner id) if known **OR** Click the Search icon next to the ID field.
2. Select Person Search from the Options List.
3. Enter Last Name
4. Enter First Name
5. Click the **Execute Query** icon or **F8**.
6. Scroll and double click to select the desired ID.

NOTE: You can make the search case sensitive if you click the radio button.

ID and Name Extended Search

1. Enter name (including wildcards) directly into the Name field.
2. Must be in Last Name, First Name format.
3. Press the Enter key.
4. If only one match, ID number is populated.
5. If more than one match is found, the ID and Name Extended Search box displays.
6. Click drop down arrow to view results. Select name to return it to the form field.
7. Narrow the search by entering additional criteria such as: City, State, Birth Date and Gender. Use the Reduce Search icon to re-run the search. 

List of Values LOV

*Many fields only accept codes from a defined List of Values **LOV**. You can tell that a field has predefined values if the field name appears in Dark Blue.*

Click on the drop down arrow next to the field or double click in the field to see the list of predefined values then select appropriate value and click **OK** or double click the selected value.

Wildcards

The Percentage % and Underscore _ signs can be used at the beginning, middle, or end of a word. The Percentage Sign % represents any character or a **SET OF** characters and the Underscore Sign _ represents **ONLY ONE** character but can be used multiple times.

If you know part of a name, you can type in the part you know, add a percentage sign then press either **Enter** or **F8** (depending if you are in a Form or a Query) and the system will search for all the names that fit your search criteria. You can do this with both first and last names.

Calendars

Any field that requires a date will have a Calendar Icon next to it. Click on the icon to bring up the calendar. You can also click on "Help" on the Menu Bar - select Calendar.

Adding/Updating Records

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

Inserting New Records:

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.

Updating Information e.g. person's name:

1. Go to an identification form such as SPAIDEN.
2. Go to the **Current Identification** window.
3. Enter the new data over the existing data.
4. **Save**.
5. Go to the next block (which takes you to the **Alternate Identification** window) to see the changes.

Customizing Banner 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.
- Display options tab.

Default Expanded Menu

1. Access the **General User Preference Maintenance Form (GUAUPRF)**.
2. Choose the **Menu Settings** 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

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).

My Banner

My Banner includes the forms, jobs, menus, and QuickFlows that are most important in your daily work.

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.
3. In the left pane, select each object you want to add to the menu by double-clicking it. The name will be highlighted.
4. Repeat steps 2 and 3 for each object type you want to add to the menu.
5. Click the **Insert Selection** button in the middle of the form. The selected object(s) are added to the right pane below the place you clicked. 
6. Save and close/exit.

You can also add forms to My Banner while you are on the actual form, just right click the form and select Add to Personal Menu.

Using/Getting Help

Banner has several kinds of help that can give you immediate online assistance:

- **Banner Book shelf.** 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.
- **Local Dynamic Help.** Although this help is completely written and maintained by Mt. SAC, you can get Banner Dynamic Help by clicking the Banner radio button.
- **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 Support Request.** help.mtsac.edu self-service portal.
- **Email.** helpdesk@mtsac.edu
- **Call us.** (909) 274-4357