

TRUMAN BANNER 7 NAVIGATION HANDBOOK

May 1, 2006

Table of Contents

BANNER INB Browser Information	2
Accessing the BANNER INB Web Client	3
Your BANNER INB Username and Password	4
Logging In To BANNER INB	4
Truman-Specific Information.....	5
ID Number	
Terms (Semester Codes)	
Colleges (Academic Divisions)	
CRNs (Course Reference Numbers)	
BANNER INB Navigation	
GUAGMNU – General Menu.....	7
Searching for a Person	
Tabbed Forms	10
Validation Tables/Drop Down Values	
The Options Menu	13
GUAUPRF	14
Navigating to Forms Shortcut.....	16
Other Keyboard Shortcuts.....	17
Saving Data to your Workstation from a Submitted Job	18
Changing Your BANNER INB Password	24
APPENDIX A: Pop-up Blockers.....	28
APPENDIX B: Creating a Personal Menu in Banner	
APPENDIX C: Banner Online Help	

Revised with permission from Drake University Office of Information Technology

BANNER INB Browser Information

The Banner 7 client is browser based, whether you are using a PC or a Mac workstation. Supported browsers for PC and Mac are as follows:

- PC - Microsoft Internet Explorer 6.0/7.0
- Macintosh - Safari 1.2

For the best display of BANNER in your browser your monitor resolution should be set to 1024 x 768 pixels. In order to do this on a PC, perform the following steps:

1. Open your Control Panel.
2. Double click on the Display Icon.
3. Click the Settings tab.
4. Set the Screen Area to 1024 X 768.
5. Click OK.

To set the screen size on a Mac, perform the following steps:

1. Click on the System Preferences icon on the Dock.
2. Click the Displays icon.
3. Select the desired resolution - 1024 X 768.
4. Close the System Preferences Window.

A minimum screen size of 15" is recommended. If you do not have a 15" monitor you may not be able to see the contents of one form on one screen and scrolling may be required.

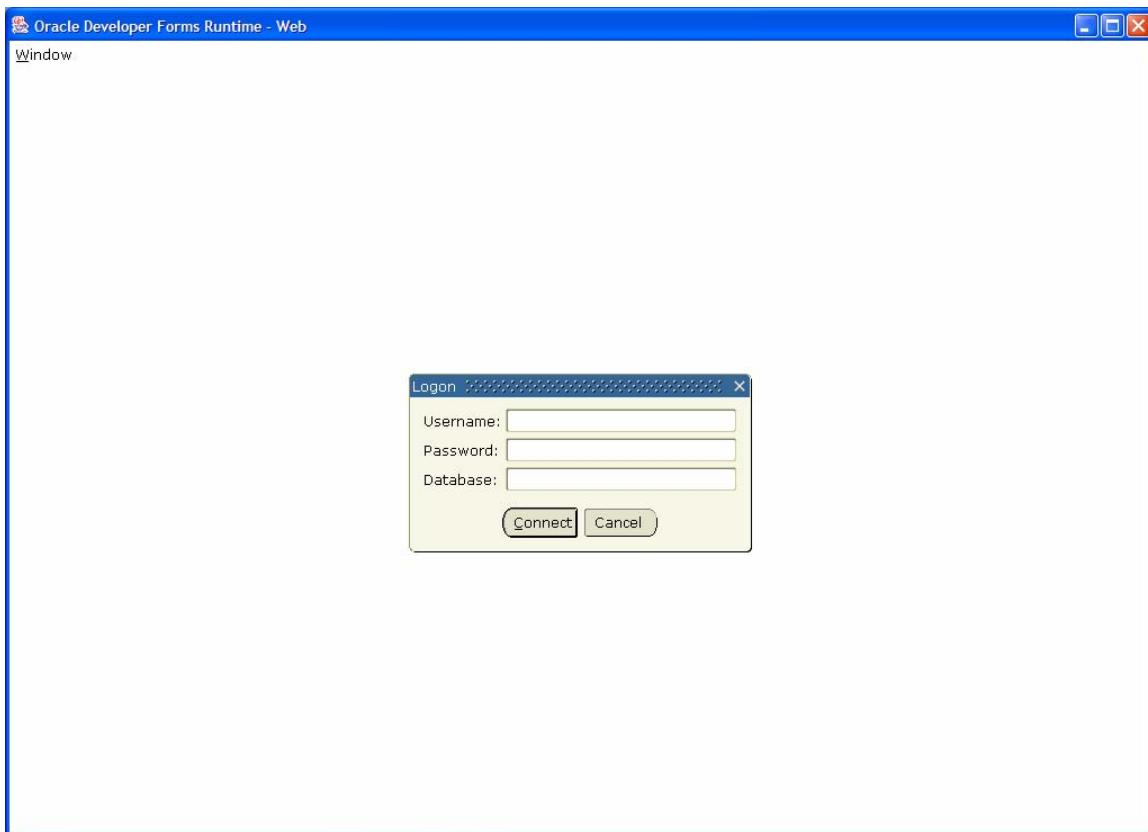
You will also want to disable any popup blocker that you have enabled. If you do not do this, you will not be able to use valuable tools like the Banner Bookshelf and On Line help. Appendix A contains sample instructions for disabling your popup blocker for selected sites. Please contact the Help Desk at extension 4544 if you need assistance in disabling your popup blocker(s).

Accessing the BANNER INB Web Client

1. Launch your browser
2. Enter <http://banner.truman.edu> in the Address box, or click on the link. Before clicking "Go" you should add the URL to your Favorites list so that you do not need to enter the URL each time you need to launch BANNER INB.
3. This will launch the BANNER INB login screen in a new window. **Do not** close this window or the initial window or BANNER INB will close. During your first launch, Jinitiator should automatically download. Follow the prompts allowing software to install and at the final prompt choose "Grant Always."

Your initial launch may take approximately 60-90 seconds. Please be patient while the application loads. Subsequent launches should not take as long. BANNER INB will launch in a new window. **Do not** close the initial window or you will exit BANNER INB abnormally which may cause problems with system resources.

The login screen will appear as follows:



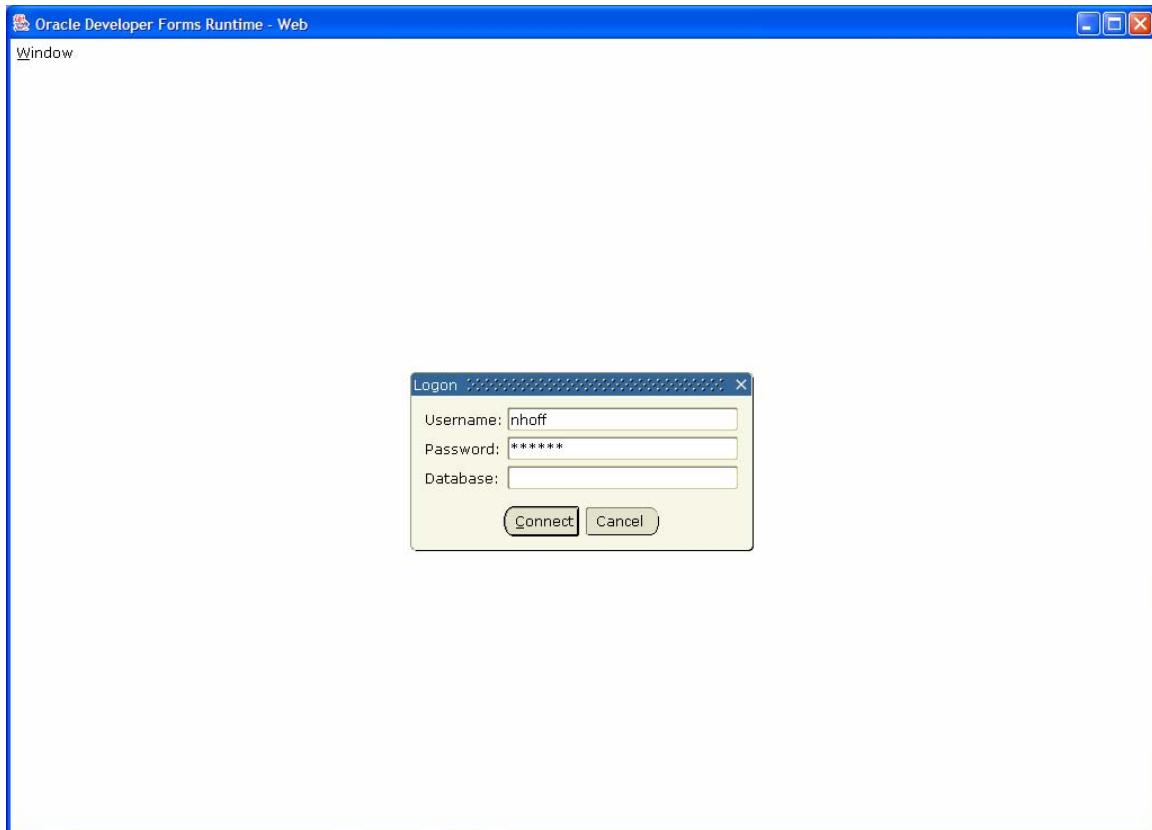
Your BANNER INB Username and Password

Your BANNER INB username is the same as your network ID. A generic password will be provided to you for training purposes—you will need to change this password during training.

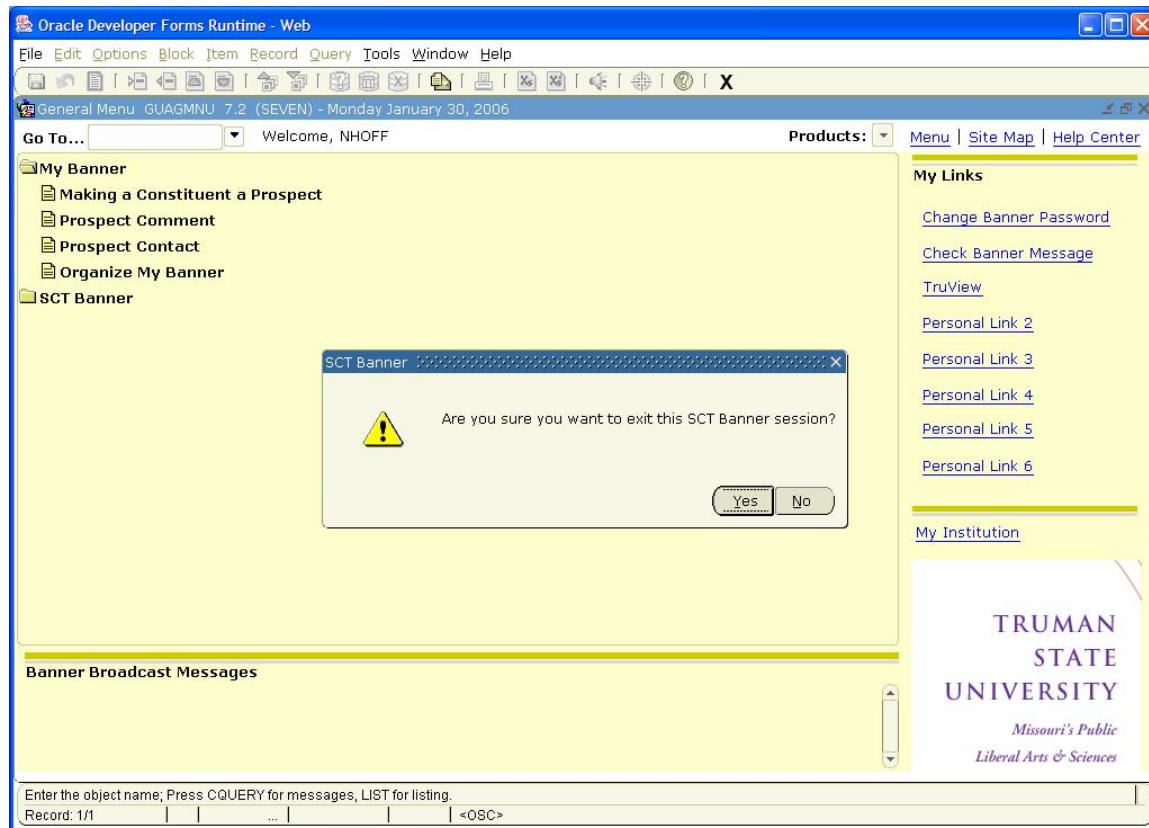
As a reminder, you will be required to change your BANNER INB password every 90 days. You will be reminded again by the Office of Information Technology Services prior to the enforcement of password changes. Instructions for changing your BANNER INB password have been included in this document for your convenience.

Logging In To BANNER INB

1. Enter your Username
2. Enter your Password.
3. Do NOT enter anything for the Database.
4. Click the “Connect” button.



When logging out of BANNER INB make sure you log out by clicking on one of the “X”’s in the upper right corner of the screen. Do not close the initial window as this will end your session abnormally and may cause problems with system resources. When logging out you should see the following screen:



Truman-Specific Information

ID Number

System generated IDs will be used for all faculty, staff and students, as well as vendors. The social security number will be recorded in Banner to be used for payroll and required federal and state reporting. However, the system generated IDs will be used to assign faculty to course sections, enroll students, etc.

Term

Terms will be designated by the complete year followed by the semester codes:

YYYY10 = Spring Semester

YYYY20 = May/Spring Interim

YYYY40 = Summer Semester

YYYY50 = August/Summer Interim

YYYY60 = Fall Semester

YYYY70 = December/Winter Interim

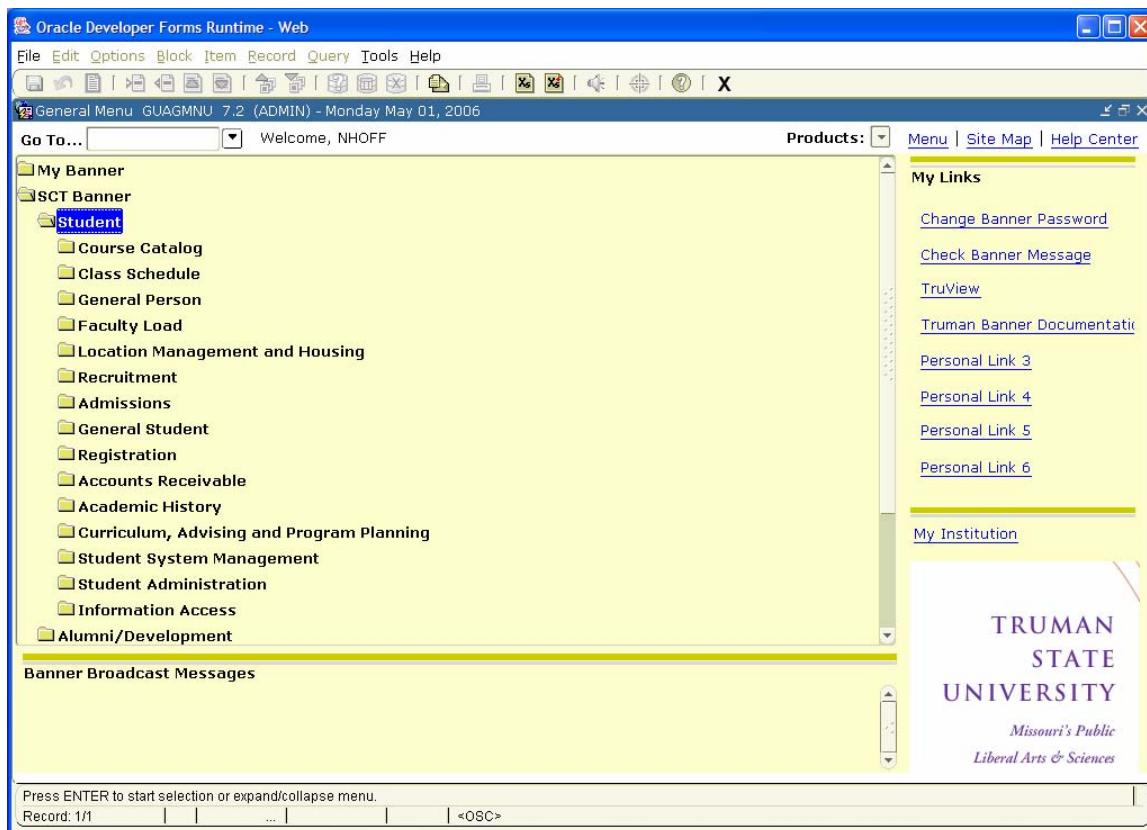
College	Truman will use “college” fields in Banner to indicate Academic Divisions.
CRN	The <u>Course Reference Number</u> will be used as schedule numbers for course lookup and registration. CRNs change each semester and are unique for each section of each course offered for a given term.

BANNER INB Navigation

GUAGMNU – General Menu

The first form you will see is GUAGMNU. Under products menu, click on “Student”. This will display a list of Student system components. Most of the components that you will use will be a part of the Student system. The file folders in the menu indicates that a sub-menu is available. Click on the file folder to display the sub-menus.

You will see the “Go To” Box and Menu Tree on the left-hand side of the screen. You can use the up and down arrow keys while your cursor is in the “Go To” box to scroll through forms you have recently opened.



On the right-hand side of the screen you will see a menu area. This area allows you to quickly change your password, access the Banner Bookshelf and set up quick links to website that you commonly use. Instructions for setting up quick links appear later in this document. The My Institution link takes you to directly to the Truman homepage at <http://www.truman.edu>. The TruView link will take you directly to TruView. However you will still need to login to TruView, including Self-Service Banner (SSB) using your network ID and PIN.

Auto Hint Line

The Auto Hint Line will display a variety of information, depending on the form and condition. Here you may find:

- Hints on the field the cursor is in
- Certain error messages
- The number of records displayed
- If a field has a List of Values associated with it

SEARCHING FOR A PERSON

Each person will be assigned a system-generated Banner ID which will be used instead of the social security number. This ID will always begin with at least three leading zeros. The leading zeros are part of the ID number and are required when looking up information regarding a person.

Person Search – SOAIDEN

The Person Search Form is a query form that will search the database for matches to criteria that you enter. This form also has a column for birth dates that you can use as a verification tool. However, you cannot use the birth date as search criteria in this query form.

Access the Person Search Form (SOAIDEN) by clicking on the magnifying glass icon in the Key Block and select Person Search.

Search for the person by Name:

Enter the person's last name in the Last Name field. Next, enter the person's first name, or enter the first initial followed by the percent wildcard (%) in the First Name field.

Perform an Execute Query (F8) command to begin the search.

Possible Search Results

Single Match: double-clicking in the ID field will automatically take you back to your application form and populate the Key Block with the selected person.

Multiple Matches: check to be sure you are selecting the correct person by verifying other identifying information such as middle name or birth date. Banner will display previous names and IDs in search results. These records are identified with an indicator in the Chg field. A name change would be indicated by an N. An ID number change would be indicated by an I.

ID and Name Extended Search

An extended search can be performed from any name field. The steps are simple and you may use other fields, including birth date or address information to query.

From the ID field in the Key Block, Tab into the name query field.

Enter last name, a comma and then the first name. If you only enter the last name, all records with that last name will be returned.

Press Enter or Tab to execute the query.

Possible Search Results

No Match: the Auto Hint line will display the following: *ERROR* Name is Invalid.

Single Match: the ID number will appear in the ID field.

Multiple Matches: the ID and Name Extended Search form will appear.

Tabbed Forms

Another feature of Banner 7 is that many forms are tabbed for easy access to additional forms. You will notice the tabs at the top of the page. If you click any of the tabs it will take you directly to that form. For example, clicking the E-mail tab in the SPAIDEN form will take you to GOAEMAL.

The screenshot shows a Windows application window titled "Oracle Developer Forms Runtime - Web: Open > SPAIDEN". The menu bar includes File, Edit, Options, Block, Item, Record, Query, Tools, Window, and Help. The toolbar contains various icons for file operations like Open, Save, Print, and Find. The title bar says "General Person Identification SPAIDEN 7.2 (SEVEN) ::". The main area has an "ID:" field containing "000010116" and a "Generate ID:" button. Below this is a tab bar with "Current Identification", "Alternate Identification", "Address", "Telephone", "Biographical", "E-mail" (which is highlighted in purple), and "Emergency Contact". The "E-mail" tab section contains three entries:

E-mail Type:	Value	Description
E-mail Type:	AL	Alumni
E-mail Address:	nhoff@truman.edu	
Comment:		
Activity Date:	07-JUL-2005	User: Conversion

E-mail Type:	Value	Description
E-mail Type:	CA	Official Campus e-mail Address for Faculty/Staff
E-mail Address:	nhoff@truman.edu	
Comment:		
Activity Date:	17-JUN-2004	User: CONVERSION

E-mail Type:	Value	Description
E-mail Type:	E1	Employment 1 - Advancement
E-mail Address:	nhoff@truman.edu	
Comment:		
Activity Date:	19-JUL-2005	User: Conversion

At the bottom, there is a footer with "E-mail Type; LIST for available types.", "Record: 1/4", and navigation buttons.

Clicking back on the Current Identification tab will return you to the SPAIDEN form.

The screenshot shows the Oracle Developer Forms Runtime - Web interface for the SPAIDEN application. The title bar reads "Oracle Developer Forms Runtime - Web: Open > SPAIDEN". The menu bar includes File, Edit, Options, Block, Item, Record, Query, Tools, Window, and Help. The toolbar contains various icons for file operations like Open, Save, Print, and Database. The main window displays the "General Person Identification SPAIDEN 7.2 (SEVEN)" screen. At the top, there is a search bar with "ID: 000010116" and a dropdown showing "Hoffman, Nancy J.". To the right of the ID field is a "Generate ID:" button with a barcode icon. Below the search bar is a navigation bar with tabs: Current Identification (highlighted in purple), Alternate Identification, Address, Telephone, Biographical, E-mail, and Emergency Contact. The "Current Identification" tab is active, showing a form for a person named Hoffman, Nancy J. The "Person" section contains fields for Last Name (Hoffman), First Name (Nancy), Middle Name (J.), Prefix (Ms.), Suffix (), Preferred First Name (), and Full Legal Name (). The "Non-Person" section has a Name field (empty). To the right, the "ID and Name Source" section shows "Last Update" information: User (CONVERSION), Activity Date (27-JUN-2002), and Origin (CONV). Below that is the "Original Creation" section, which is currently empty. At the bottom of the form, there is a note: "Current identification number; overtype to change." and a status bar indicating "Record: 1/1" and "<OSC>".

Validation Tables/Drop Down Values

Fields having a down arrow search indicator are powered by a Banner validation table. These fields must be completed with a choice from these validation tables. Click on the arrow to generate a list of choices. For example, if you click on the address type arrow on the SPAIDEN screen, a box appears with the values that you can select for completing that field.

Oracle Developer Forms Runtime - Web: Open > SPAIDEN

ID: 000010116 Hoffman, Nancy J. Generate ID:

File Edit Options Block Item Record Query Tools Help

Identification Form SPAIDEN 7.2 (ADMIN)

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

From Date: 21-JUL-2005 To Date: Inactivate Address

Address Type: AL Alumni
Sequence Number: 2

Source:

Street Line 1: 1410 Castle Drive
Street Line 2:
Street Line 3:
City: Kirksville
State or Province: MO Missouri
ZIP or Postal Code: 63501-0000
Delivery Point:
Correction Digit:
Carrier Route:

County: MO001 Adair
Nation:

Telephone Type: AL Alumni
Telephone: 660 - 6656064

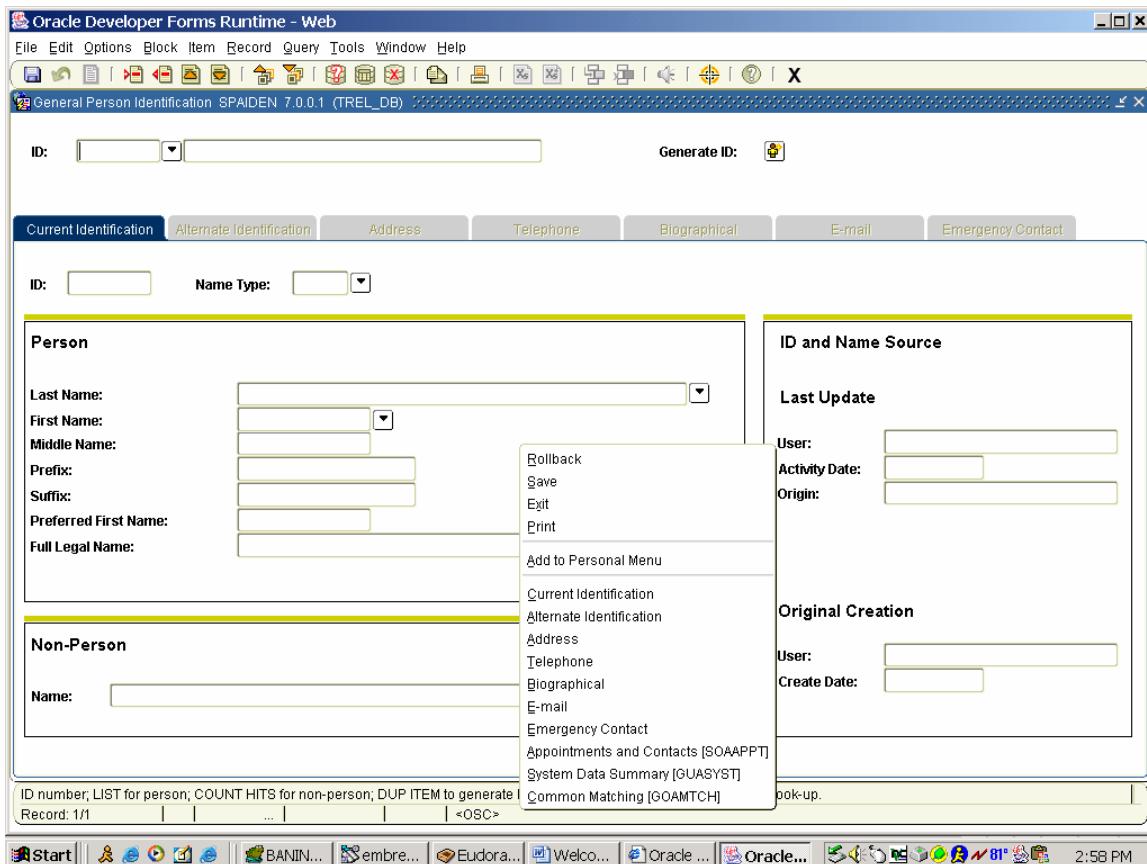
Last Update

User: PEGGYS
Activity Date: 21-JUL-2005

Address start date; format (DD-MON-YYYY); blank is always effective.
Record: 1/?

The Options Menu

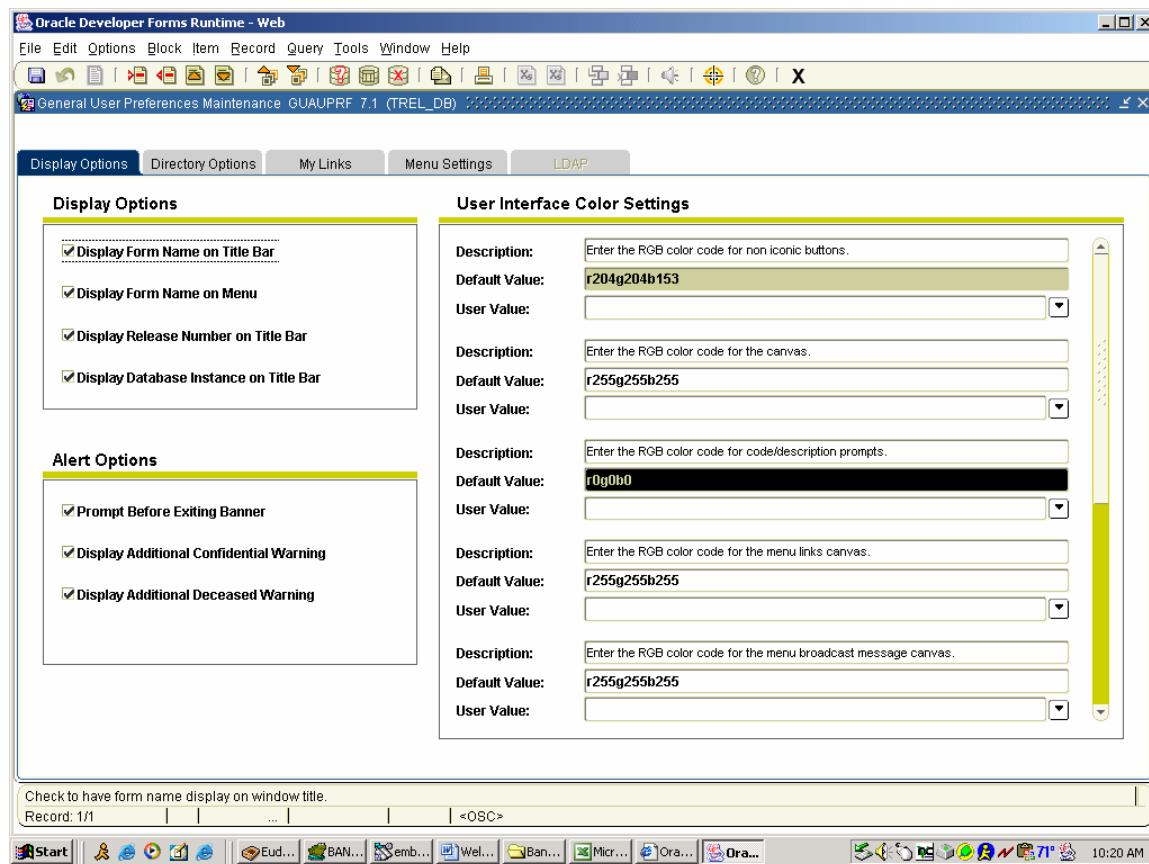
Mac users will need to use the Options menu on the menu bar. PC users may also *right-click* with the mouse on any area in the form where there are no fields to activate the Options drop down menu. This allows you to easily move to related forms or easily perform important Banner functions.



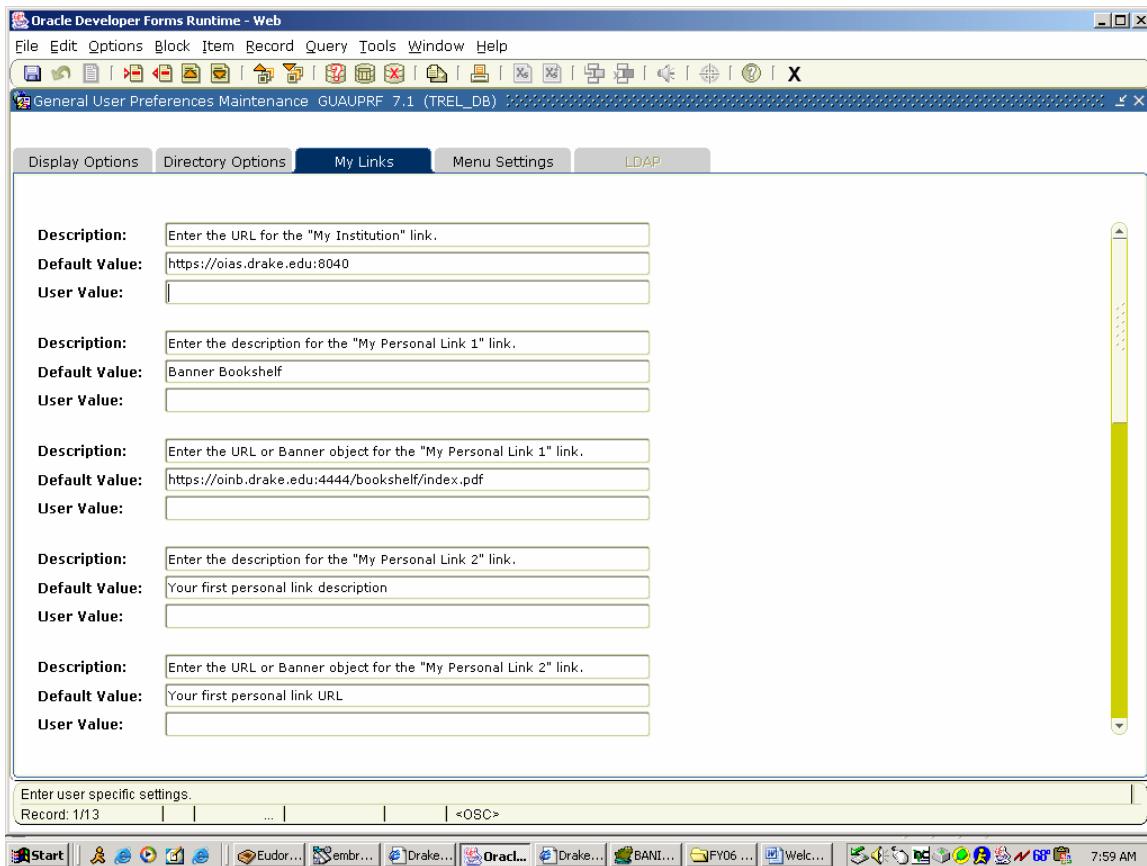
In addition, the Options drop down menu gives you the ability to Rollback, Save, Exit, Print and Add to Personal Menu (My Banner).

GUAUPRF- General User Preferences Maintenance

GUAUPRF is the form that allows you to customize your Banner 7 client according to your preferences. The first tab, Display Options allows you to customize the display, alerts and colors. Click on the check boxes to toggle the display and alert options on and off. Click on the down arrow boxes to select colors that will display in Banner.



The third tab, My Links, allows you to set up the quick links on the GUAGMNU main menu form. Enter the link description and the link URL for each link you want to set up. Do not enter values for the “My Institution” link or “My Personal Link 1” or you will lose GUAGMNU access to Banner INB and the Banner bookshelf. All links you set up will appear in the GUAGMNU links menu and you will be able to access these web sites directly from that form.



Navigating to Forms Shortcut

Banner 7 gives you the capability to navigate directly to a new form without returning to the GUAGMNU form. When you are in any form, simply press the F5 key and the “Go” box will appear at the top of your screen. Additionally, the MyInstitution link that will allow you to open the Truman homepage appears in that block. To remove that block and continue working in the current screen, simply press the F5 key again.

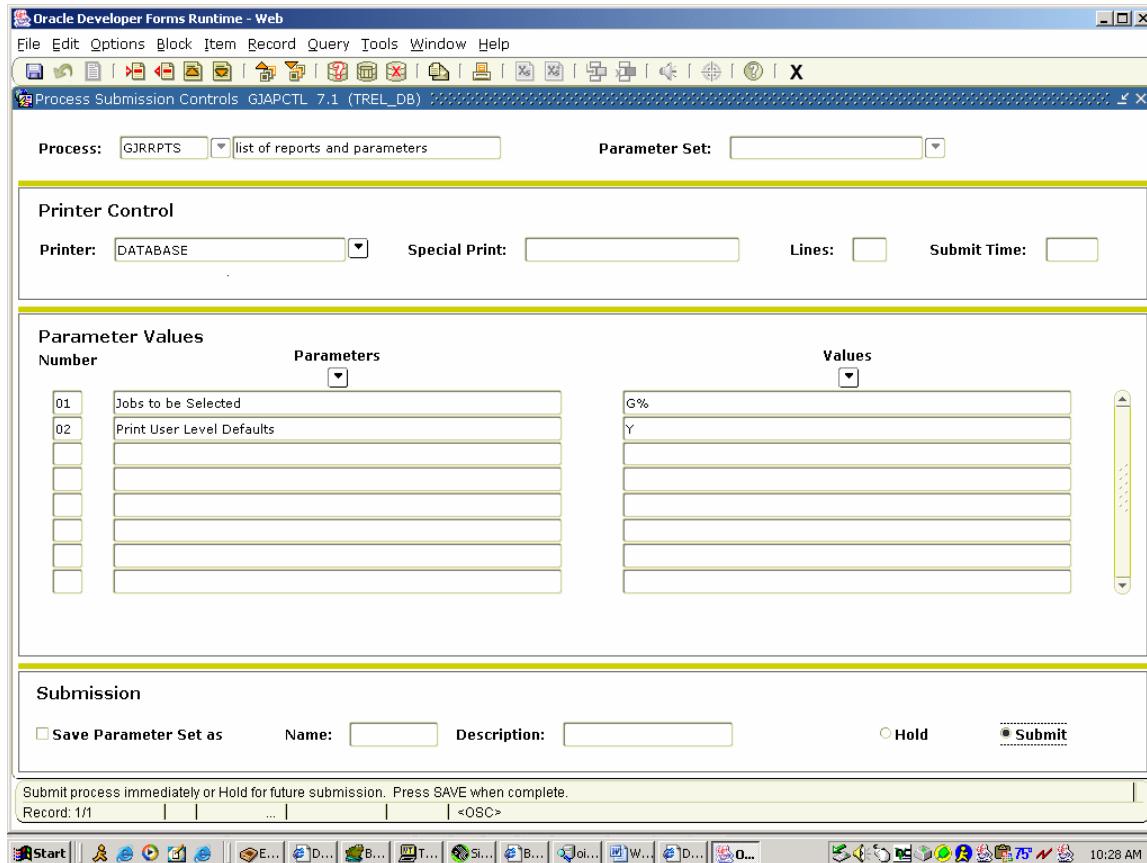
The screenshot shows the Oracle Developer Forms Runtime - Web interface for the SPAIDEN 7.2 (SEVEN) form. The title bar reads "Oracle Developer Forms Runtime - Web: Open > SPAIDEN". The menu bar includes File, Edit, Options, Block, Item, Record, Query, Tools, Window, and Help. The toolbar contains various icons for file operations like Open, Save, Print, and Find. The main window displays the "General Person Identification SPAIDEN 7.2 (SEVEN)" form. At the top, there is a "Go To..." dropdown, a "My Institution:" field set to "http://www.truman.edu.com/", and a "Generate ID:" button. Below this, the "ID:" field is populated with "000010116" and the name "Hoffman, Nancy J." is shown. A "Name Type:" dropdown is also present. The form is divided into several sections: "Current Identification" (selected tab), "Alternate Identification", "Address", "Telephone", "Biographical", "E-mail", and "Emergency Contact". The "Person" section contains fields for Last Name (Hoffman), First Name (Nancy), Middle Name (J.), Prefix (Ms.), Suffix, Preferred First Name, and Full Legal Name. The "Non-Person" section has a "Name:" field. On the right side, there is a "ID and Name Source" panel with "Last Update" information (User: CONVERSION, Activity Date: 27-JUN-2002, Origin: CONV) and an "Original Creation" panel with User and Create Date fields. At the bottom, a message bar says "Enter the object name; Press LIST for listing." and "Record: 1/1 | ... | <OSC>".

Other Keyboard Shortcuts

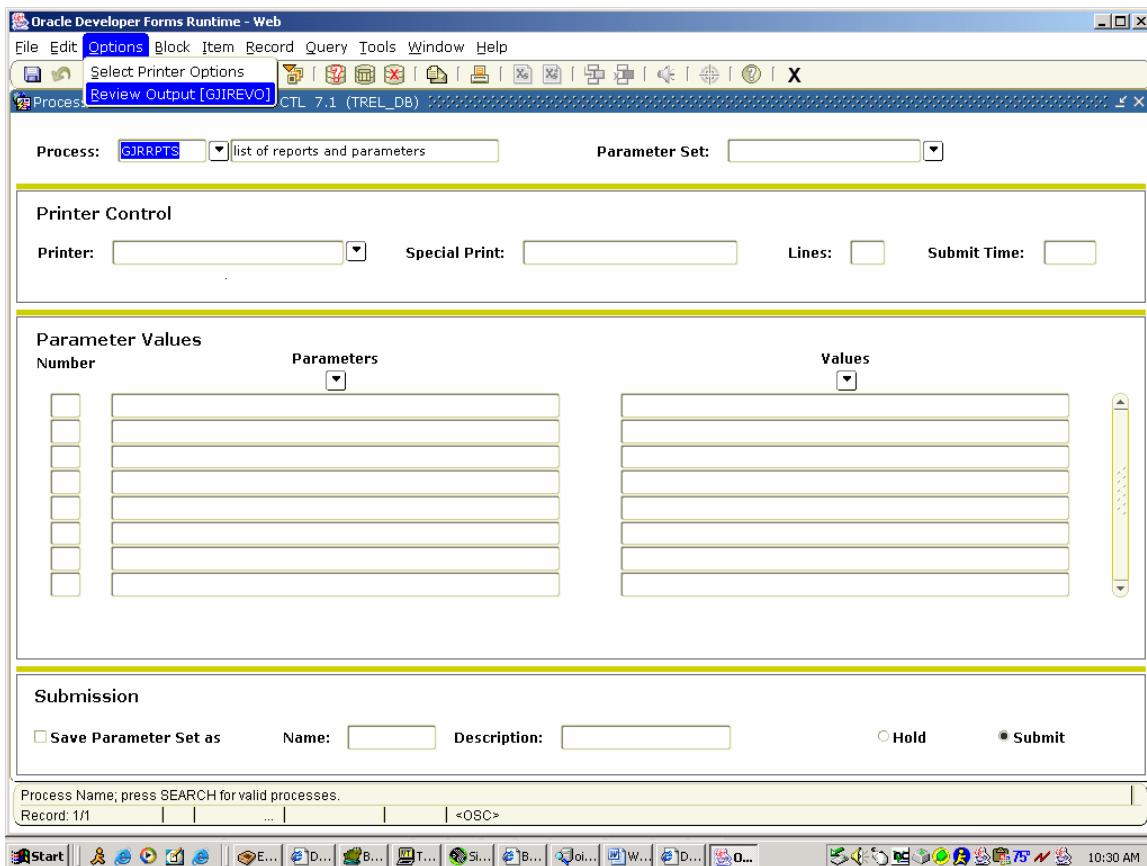
Function	Banner 7 Key Strokes
Clear Field	Ctrl + U
Count Query Hits	Shift + F2
Create Record	F6
Delete Record	Shift + F6
Display Error	Shift + F1
Duplicate Item	F3
Duplicate Record	F4
Enter Query	F7
Execute Query	F8
Exit	Ctrl + Q
Help	Alt + H + O
List of Values	F9
Next Block	Ctrl + Page Down
Next Field	Tab or Enter
Next Primary Key	Shift + F3
Next Record	Down Arrow
Next Set Of Records	Shift + Ctrl + Page Down
Previous Block	Ctrl + Page Up
Previous Record	Up Arrow
Print	Shift + F8
Save	F10
Scroll Down	Page Down
Scroll Up	Page Up
Show Keys	Ctrl + F1

Saving Data to your Workstation from a Submitted Job

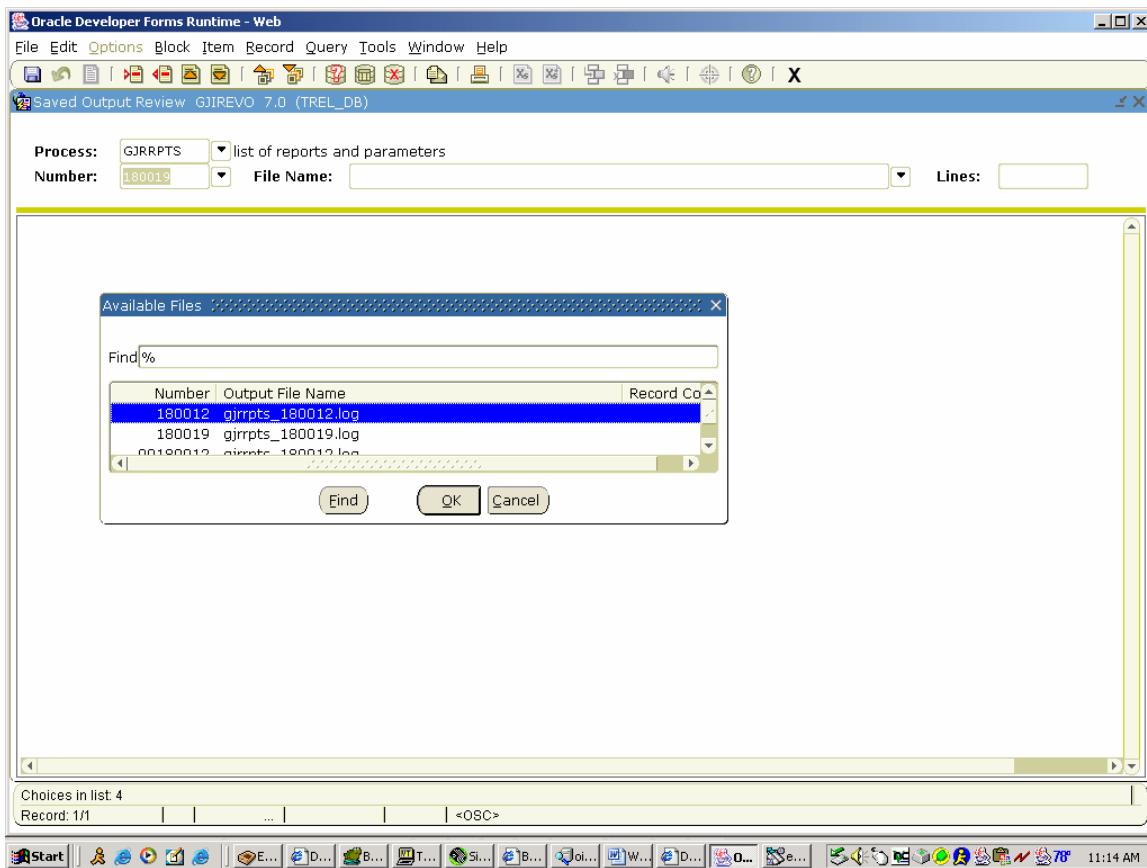
If you are a person who uses Job Submission, you may save a .lis or .log file to your workstation when you submit the job with DATABASE as the print option.



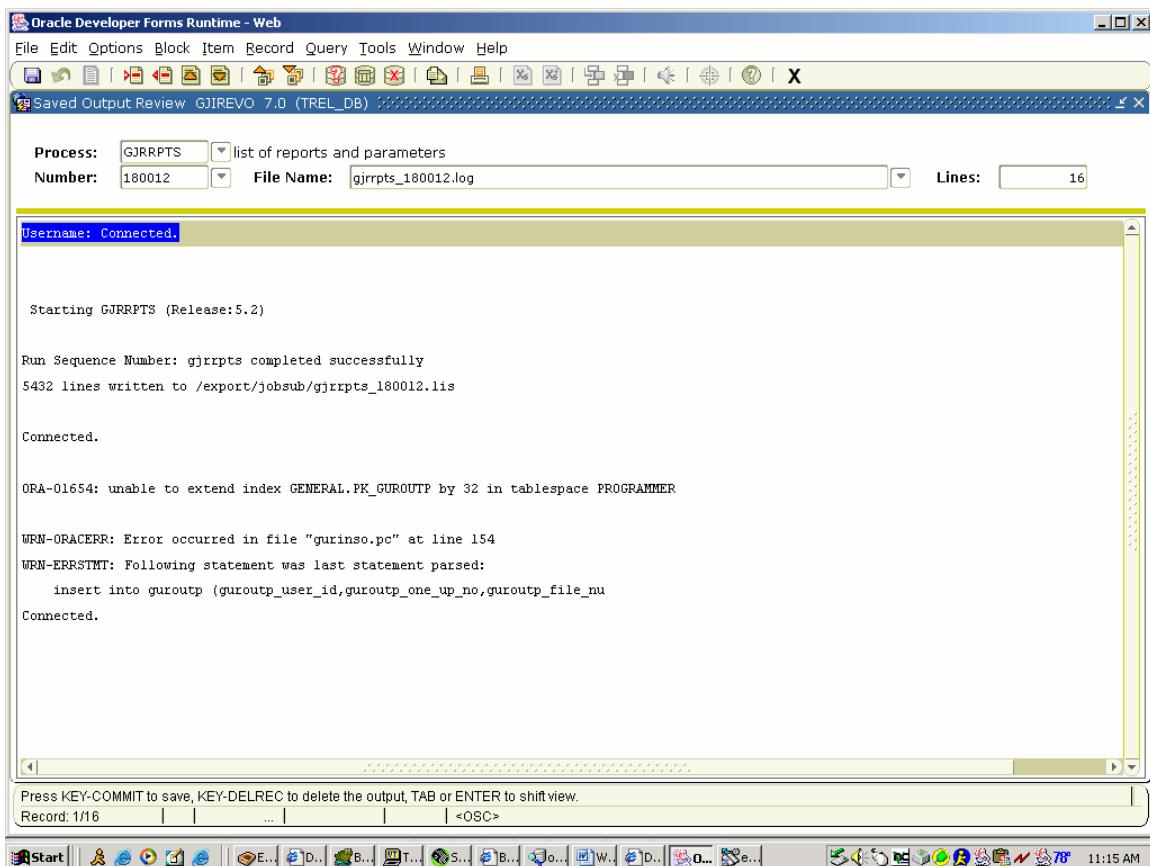
After the job has completed execution, select Review Output [GJIREVO] from the option menu.



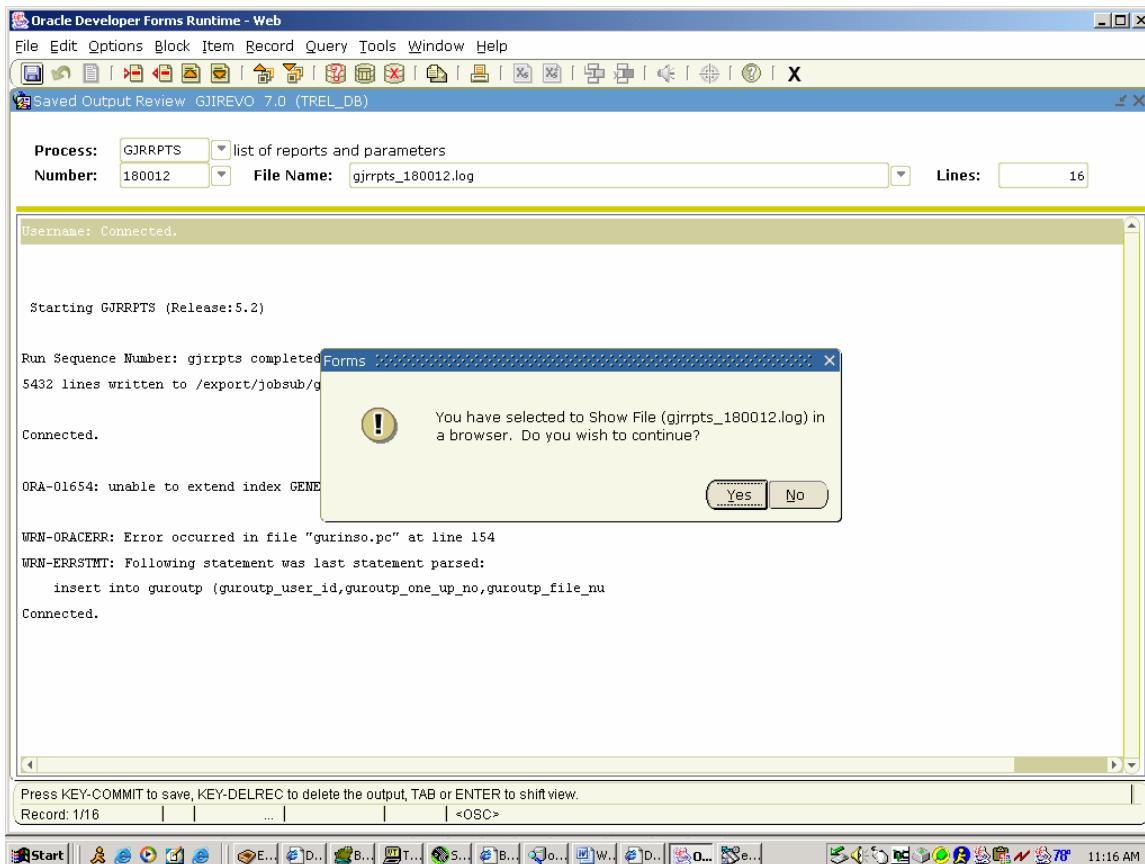
Select the file you wish to save from the list of file by clicking on the down arrow next to Number.



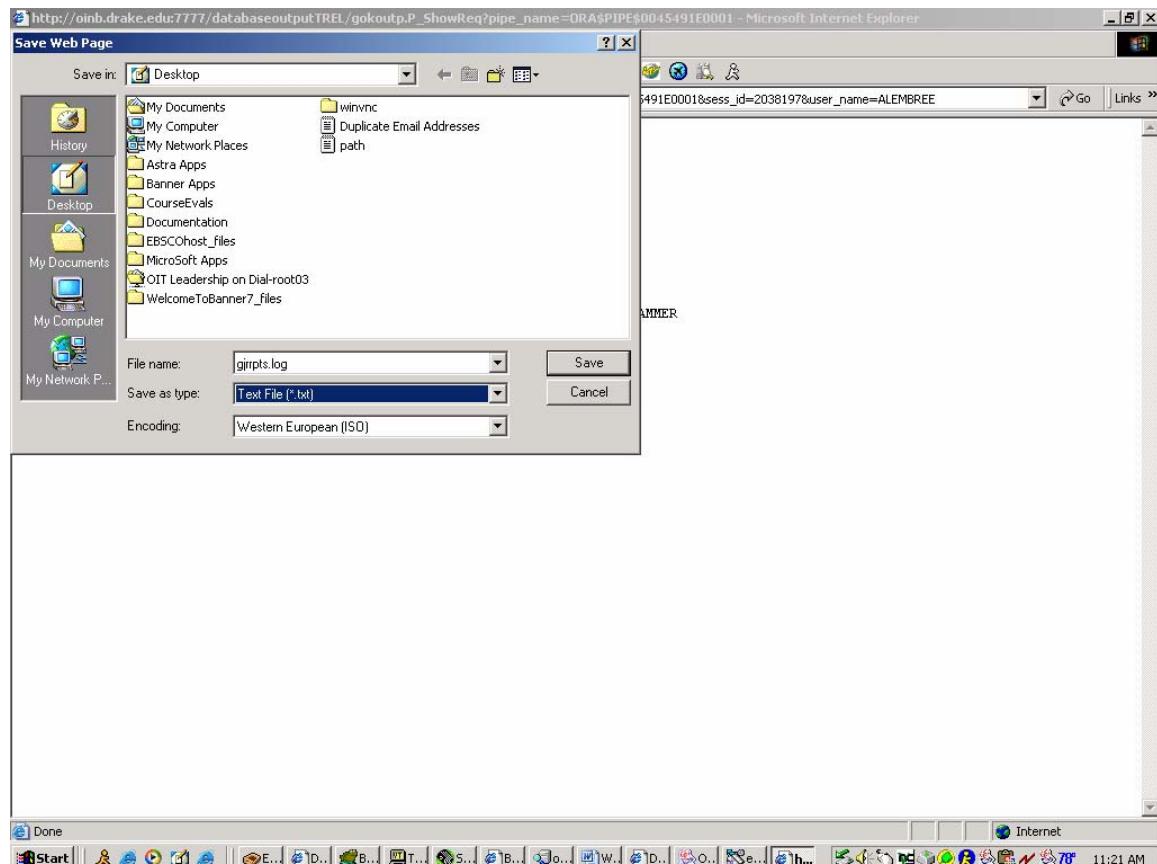
Click the Save icon on the tool bar.



Click Yes.

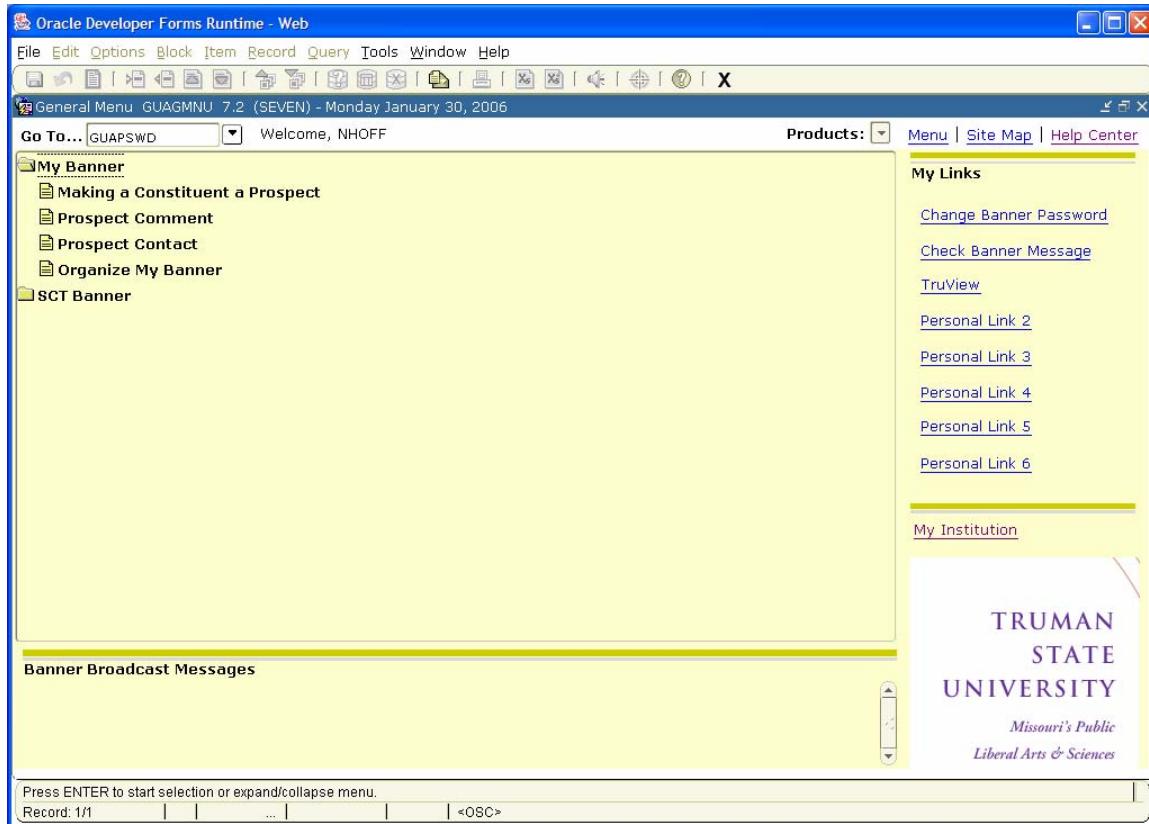


A new browser window will open with the data. To save the data to your Workstation click File on the browser menu and then select Save As. Specify the filename and the location on your workstation where you want the file saved. You will also need to specify that you want the file saved as TEXT.

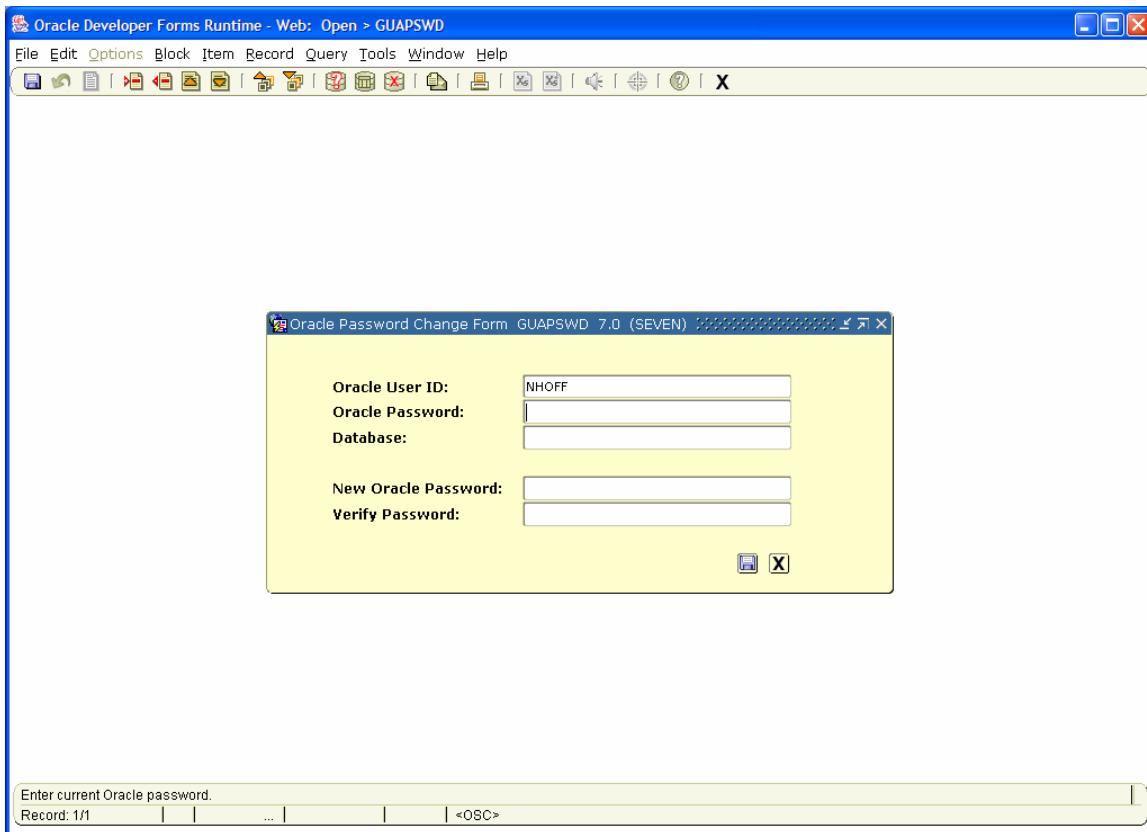


Changing Your BANNER INB Password

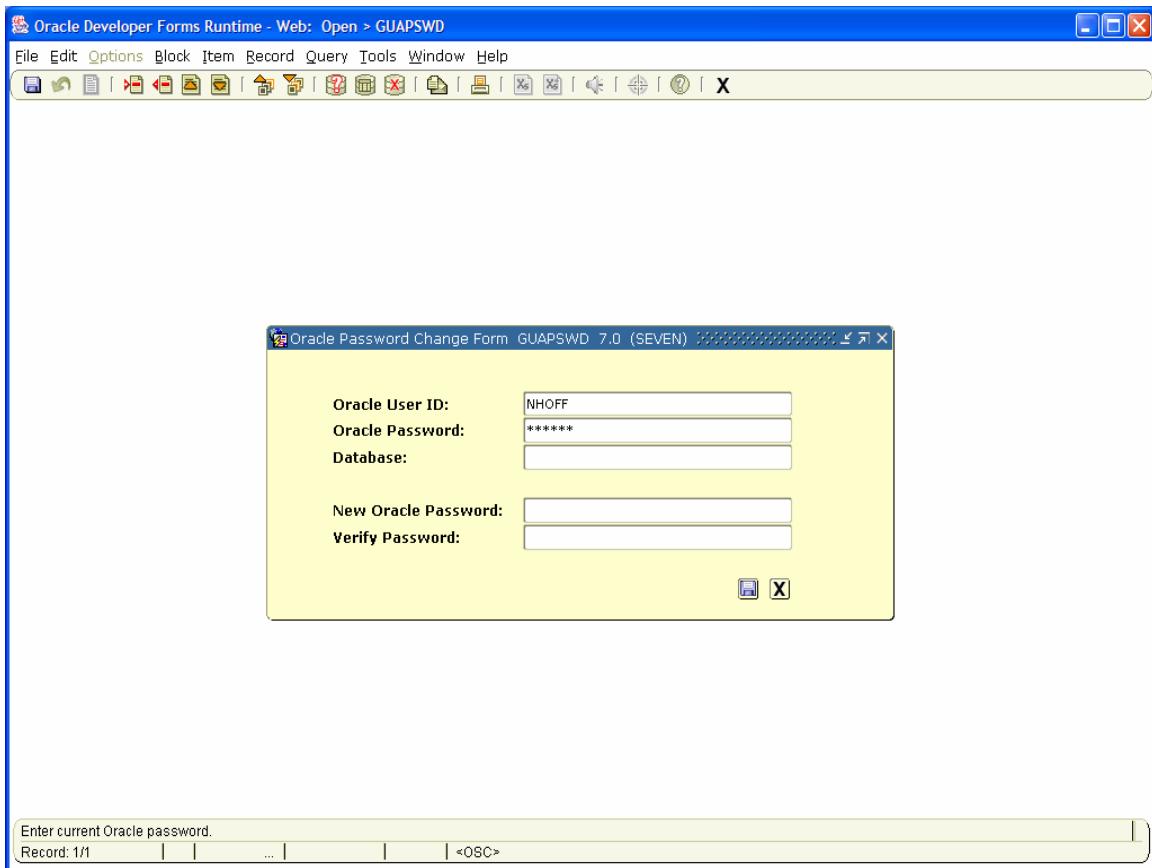
1. Log into BANNER INB using your current Username and Password.
2. Type 'GUAPSWD' in the Direct Access box or click the Change Banner Password link on GUAGMNU.
3. Press the Enter Key



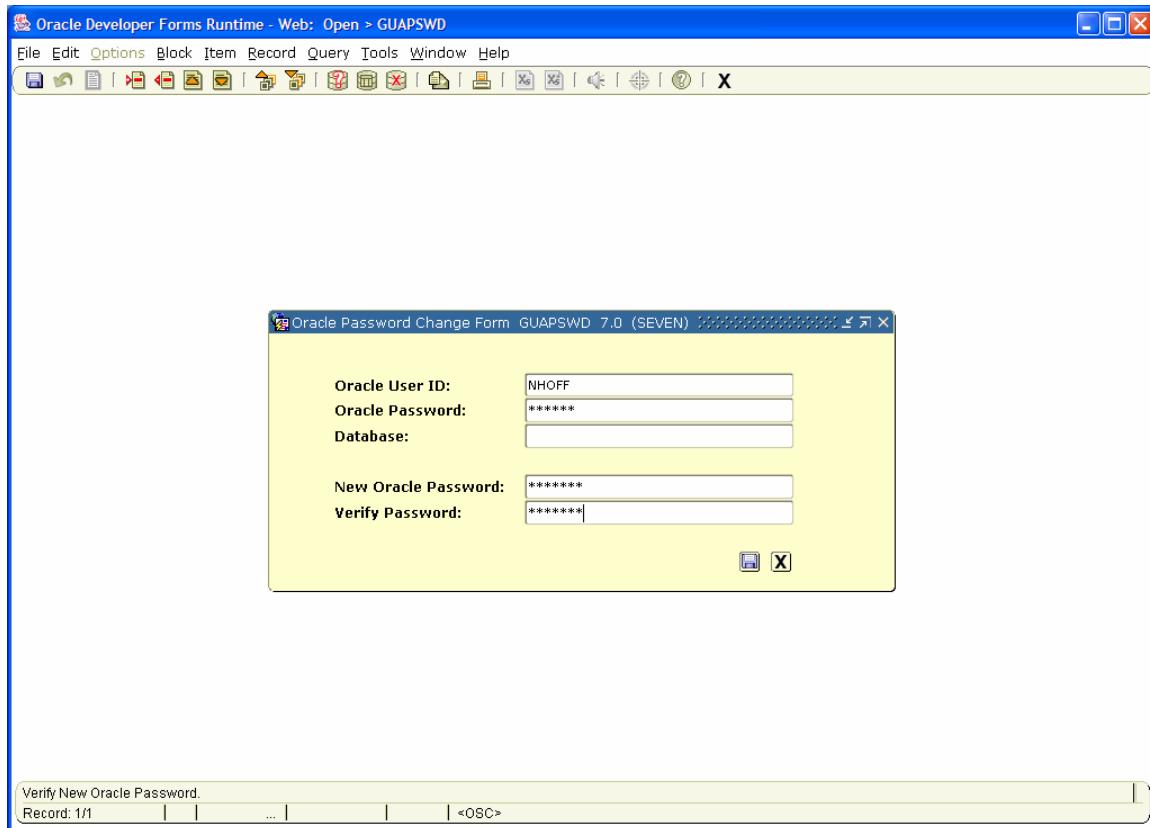
4. You will see the following screen appear.



4. Enter your **current** password in the Oracle Password box.



5. Enter your NEW password in the New Oracle Password box.
6. Enter your NEW password again in the Verify Password box.



7. Click on Disk icon at the bottom of the screen to SAVE your new password.
8. You will see the following screen confirming your password change if you have entered a valid password. If you have not entered a valid password, you will need to re-enter your New Oracle Password and Verify Password.



8. Click on **OK** again.
9. You will be returned to the main screen.
10. Remember to use your new password upon next login.

APPENDIX A: Pop-up Blockers

- **Popup windows have been suppressed.**

Popup windows must be allowed for this site.

Follow the steps below to add this site to the list of exceptions for suppressed popups.

If your browser is Netscape 7.1 or Mozilla 1.5 or higher...

1. Open the Preferences dialog under the browsers Edit menu.
2. Scroll down to the Privacy & Security Category in the left column and expand it by clicking on the arrow.
3. Click on the Popup Windows topic.
4. Here you should see an option selected to block unrequested popup windows.
5. Click the Allowed Sites button to the right of it.
6. In the Add field, add the URL below, and click the Add button.

truvview.truman.edu

7. Click OK in the Allowed Sites screen, then click OK again for the Preferences screen.
8. Now click the Continue button on this screen.

If your browser is Internet Explorer 6 and you are running the Windows XP operating system with Service Pack 2 (SP2)...

1. Open the Tools menu.
2. Click on the Pop-up Blocker sub menu.
3. Click on the Pop-up Blocker Settings option.
4. In the Add field, add the URL below, and click the Add button.

truvview.truman.edu

5. Click the Close button.
6. Now click the Continue button on this screen.

If your browser is Safari 1.2 or higher...

1. Open the Safari menu.
2. Here you should see the Block Pop-up Windows option checked.
3. If there is a check mark next to it, click it and then click the Continue button at the bottom of the page.
4. If there is not a check mark, you probably have some other pop-up blocker running. Follow the next set of instructions.

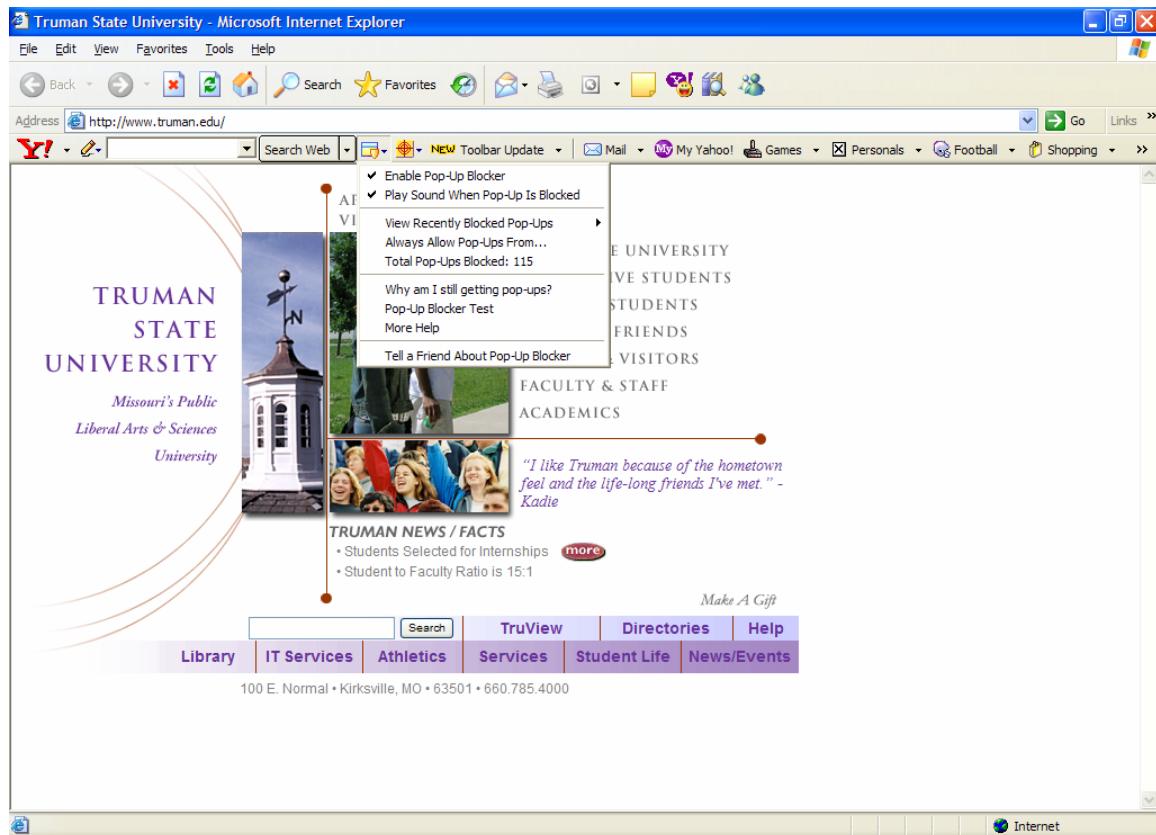
If your browser is anything else, or if either of the above sets of instructions didn't work...

1. You probably have a 3rd party pop-up blocker.
2. You will need to find and add this site to its list of allowed sites.
3. Once completed you can click the Continue button on this screen.

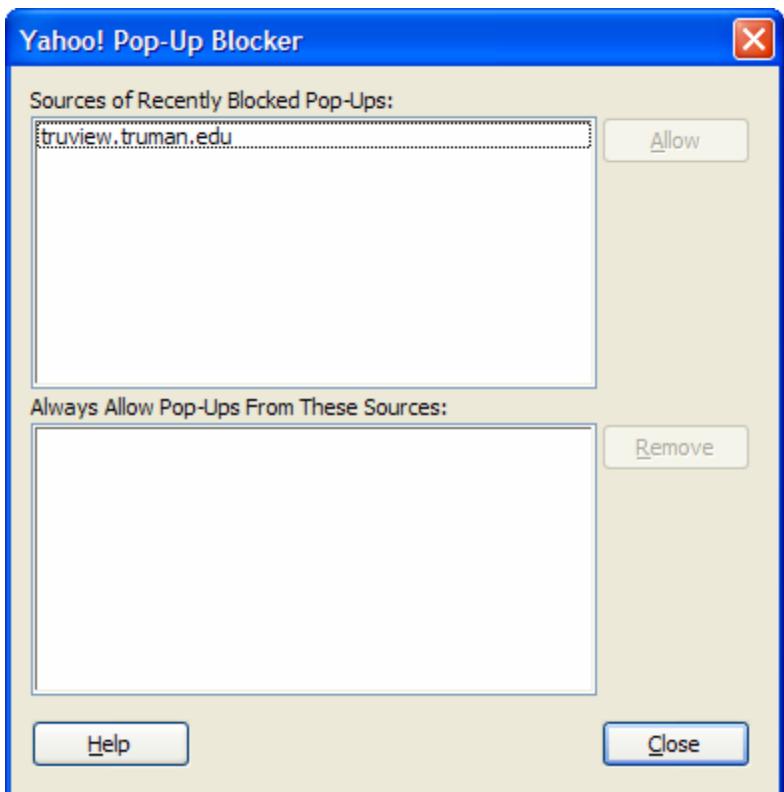
Instructions for disabling a sampling of 3rd party popup blockers are provided below.

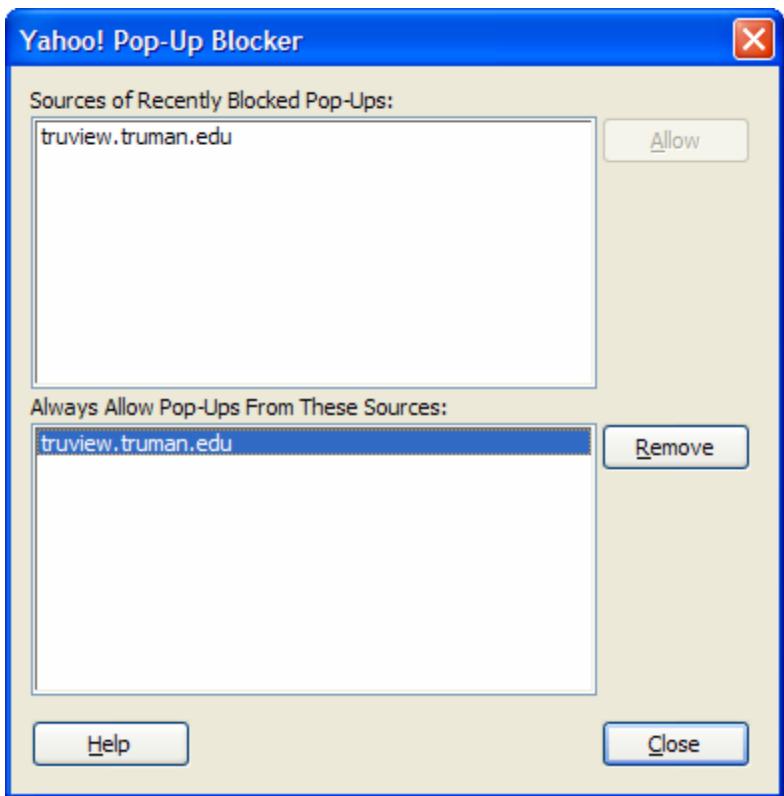
Yahoo Pop-up Blocker

While in your browser, look for a toolbar that contains a red ‘Y.’ This is your Yahoo toolbar. Click on the small button located next to the “Search Web” button. Clicking on the button causes the following drop-down box to appear:



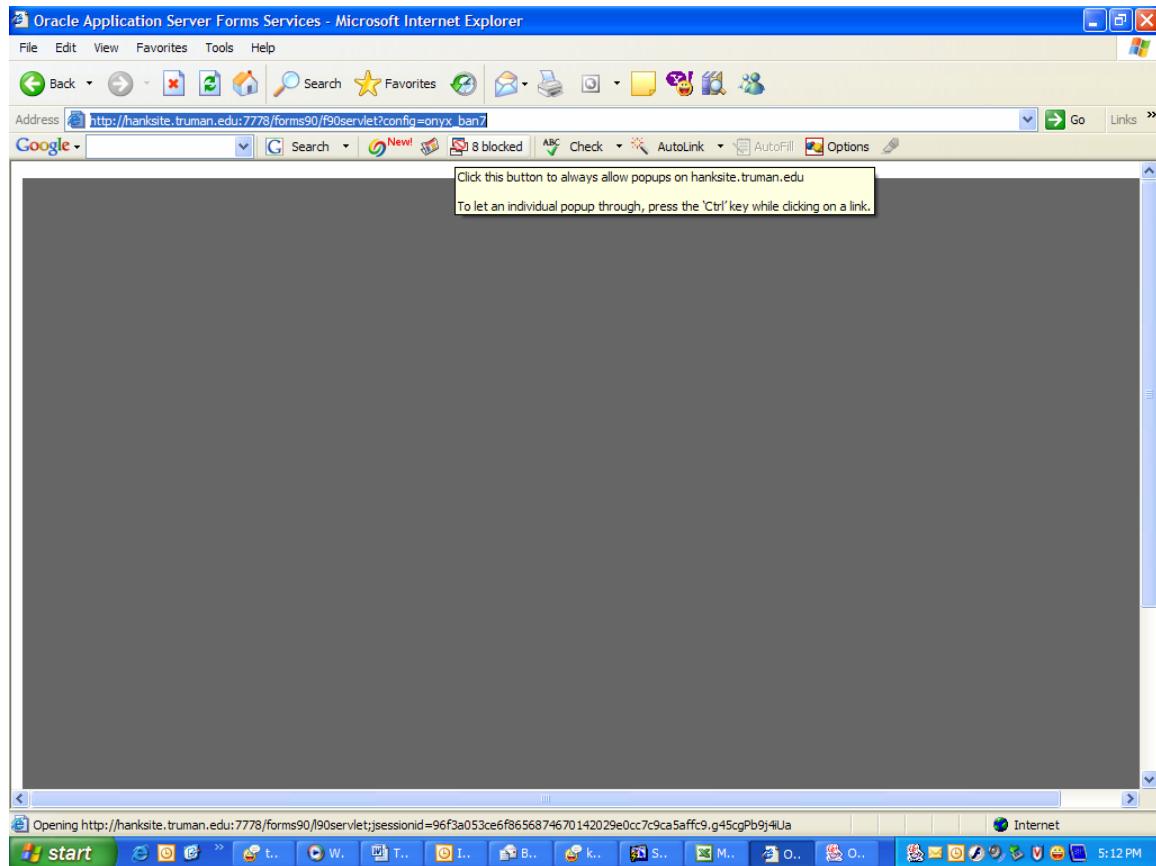
Click on “Always Allow Pop-Ups From” to see the Sources of Recently Blocked Pop-Ups. Click on the name of the source you wish to enable, and then click on the “Allow” button, followed by the “OK” button.

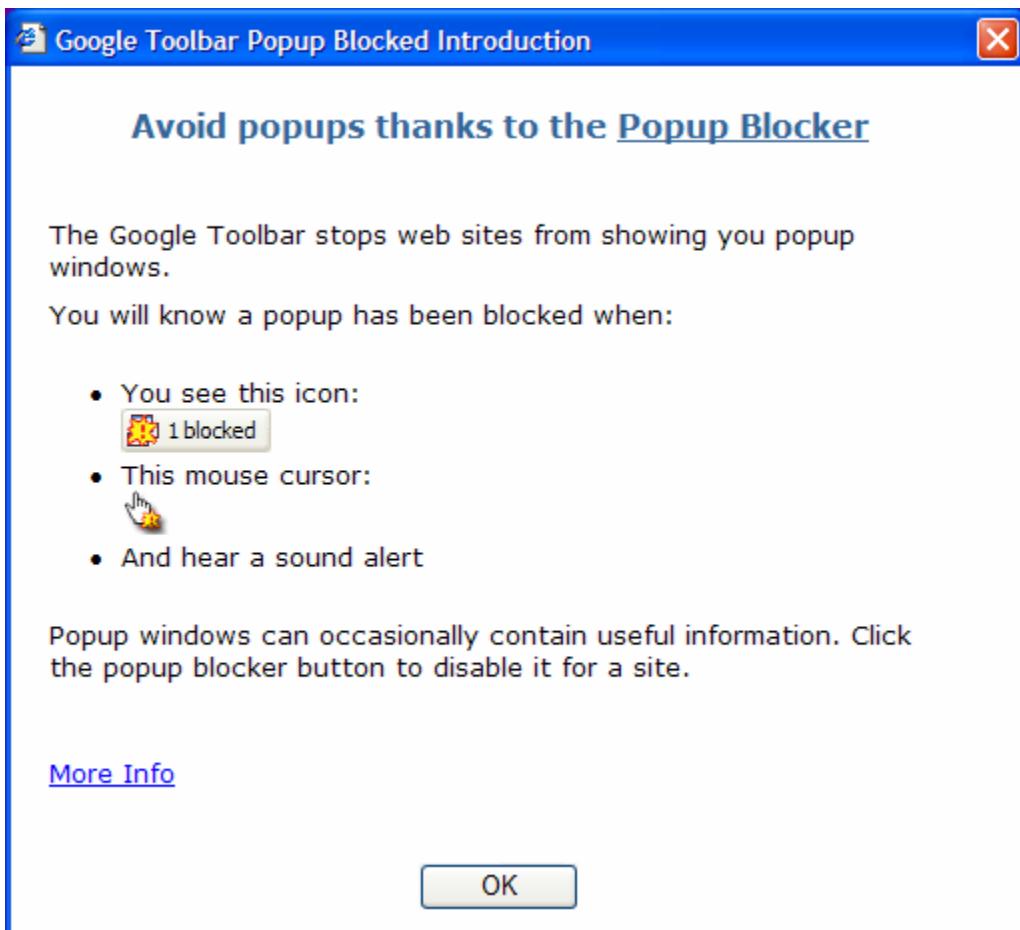




Google Pop-up Blocker

While in your browser, with the Banner INB URL in the address box, look for a toolbar that contains the word “Google.” This is your Google toolbar. Click on the small button that indicates the number of pop-ups blocked. Clicking on the button causes the following message box to appear:





To add a site to your approved list, (referred to by Google as your "whitelist"), visit the site and press the Popup Blocker button. The button text will change to read "Popups okay," indicating that the Popup Blocker is disabled on the site in question.

APPENDIX B: Creating a Personal Menu in Banner

Forms used in creating a personal menu include:

GUAPMNU to select your personal menu items

GUAUPRF to set your preferences

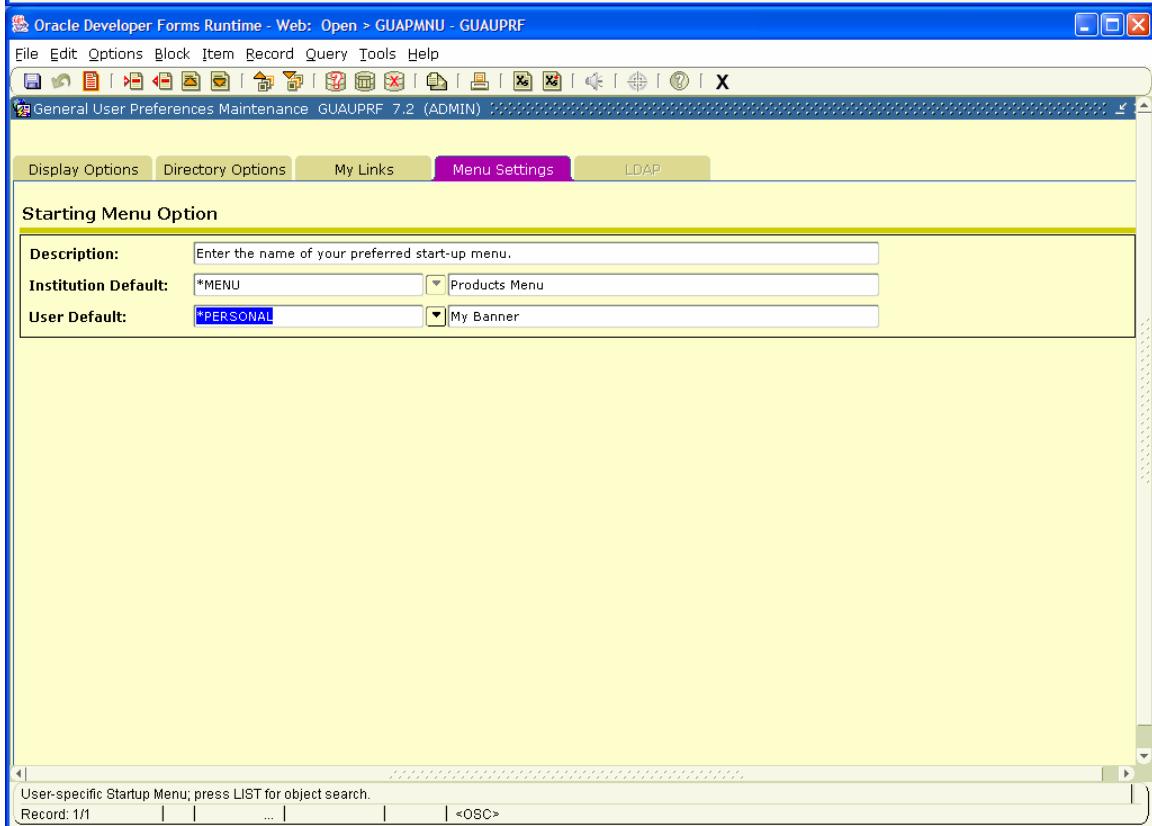
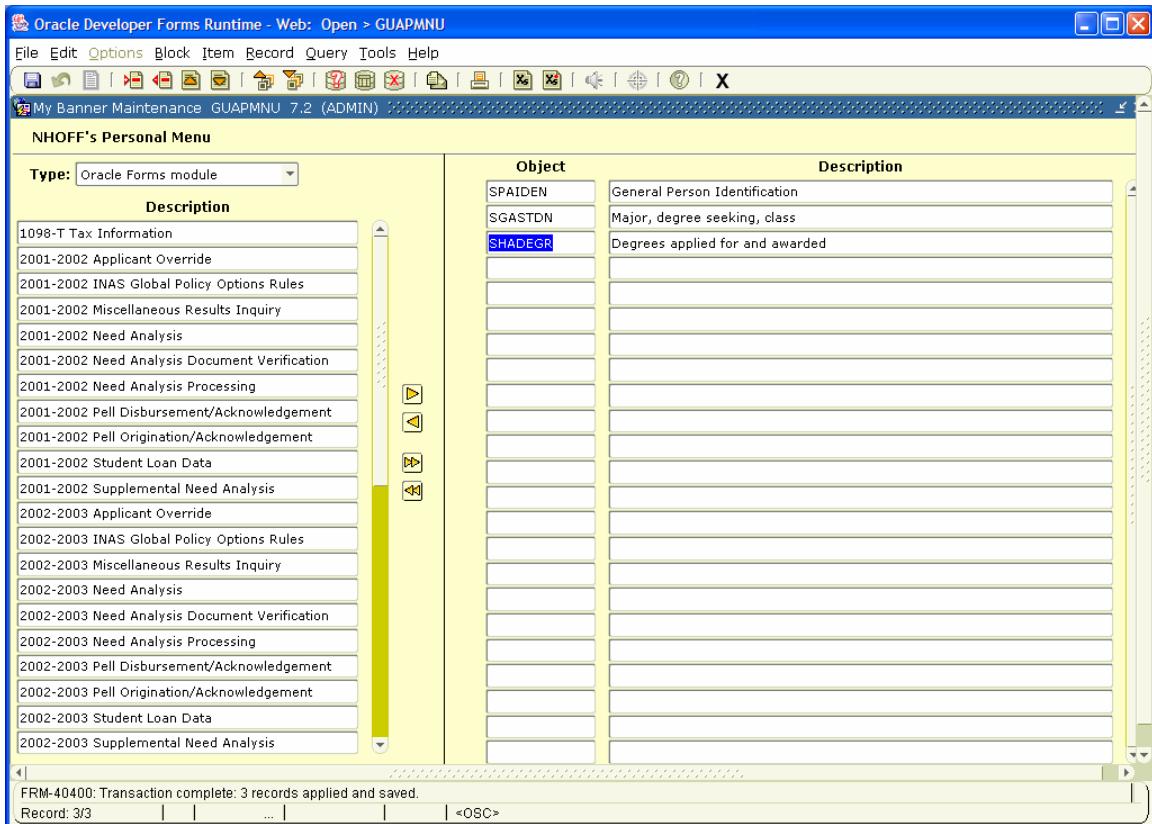
Your personal menu may use menu items that are most important in your daily work, including: forms; menus; reports; and quickflows.

STEP ONE: Define Your Personal Menu

- Using “Go To”, go to GUAPMNU
- Place the cursor in a blank Name field in the right pane
- Enter the object’s 7-character name
- Press “Enter” – the object description will appear in the right pane – you can customize the object description by deleting it and typing a description of your choice
- Save your changes by clicking the “Save” icon or by pressing “F10”

STEP TWO: Define Your Menu Preference

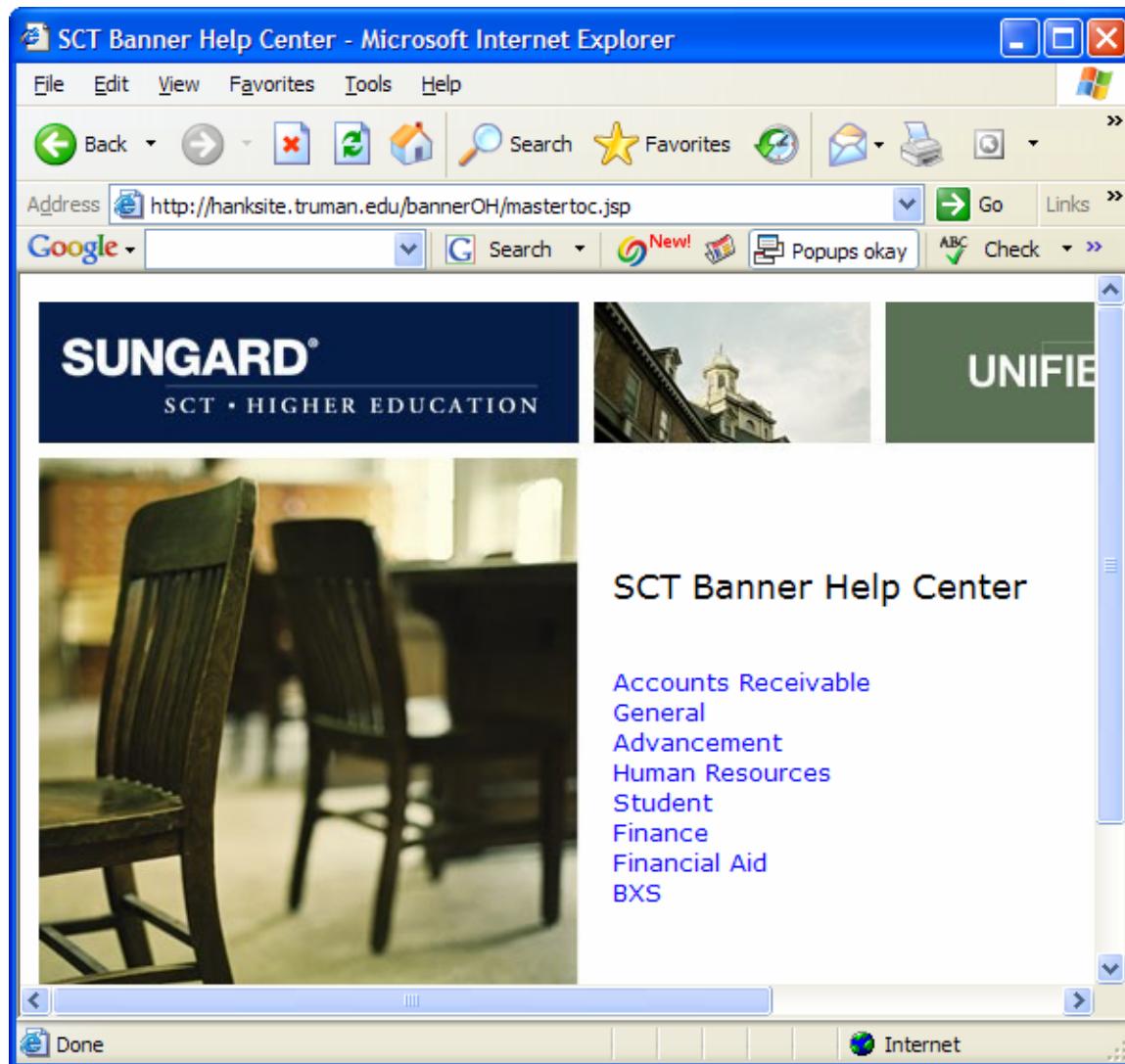
- Using “Go To,” go to GUAUPRF
- Click on the “Menu Settings” tab and enter “*PERSONAL” in the User Default field
- Press the tab key
- Click “OK” – you will need to log out and back into Banner INB to see your menu items displayed



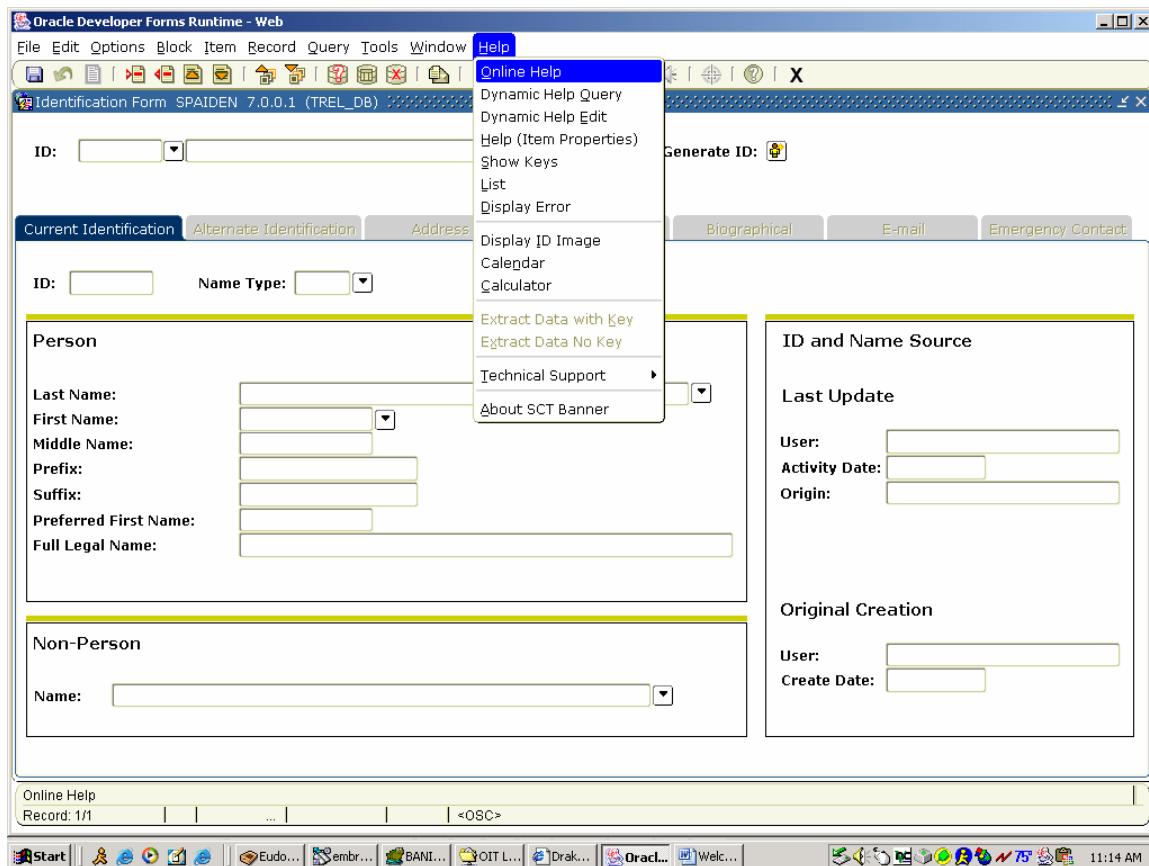
APPENDIX C: BANNER ONLINE HELP

On Line Help

There is a link to the BANNER INB Help Center on GUAGMNU. Clicking on this link will open a separate window containing the main page for On Line Help. If you use a pop up blocker, you will need to make sure you have it disabled or the On Line Help window will not open! On Line Help contains valuable information that will help you as you use Banner.



On Line Help can also be accessed from the Help menu on any form from the menu bar at the top of the form.



This will take you to the specific help for the form that you are currently working in.

The screenshot shows a Microsoft Internet Explorer window with the title bar "SCT Banner Help Center - Microsoft Internet Explorer". The address bar contains the URL "http://oinb.drake.edu:7777/bannerOH/student/index.htm#spaiden.htm". The main content area displays the "SCT Banner Help Center" page. The left sidebar has links for "Contents", "Index", and "Search". The right sidebar has a "SunGard SCT" logo. The main content area shows the breadcrumb navigation "You are here: Student > Schedule Forms > Forms > General Person Identification Form (SPAIDEN)". Below this, a section titled "General Person Identification Form (SPAIDEN)" is described. It states that the form is used to capture biographic/demographic information for all persons/non-persons associated with the institution. It explains that persons/non-persons may belong to any or all of the installed applications (Student, Finance, etc.). All persons/non-persons are first entered into the database using this form. The information maintained in this form is specific to the person/non-person and does not relate to the person's/non-person's involvement at the institution. Other modules/applications are dependent on the information captured and maintained in this form. Any changes or additions to a person's/non-person's biographic/demographic information must be made in this form. It also describes how to access the Common Matching Entry Form (GOAMTCH) from SPAIDEN to enter information for a new ID and execute the matching process. It mentions the "Online Matching Process Enabled (Indicator)" on GUAINST and the "Origin" field on GOAMTCH. It also discusses searching for names and viewing user IDs. At the bottom, it notes that current identification information can be accessed via the "Current Identification" tab.