TRUMAN BANNER 7 NAVIGATION HANDBOOK
May 1, 2006

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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:
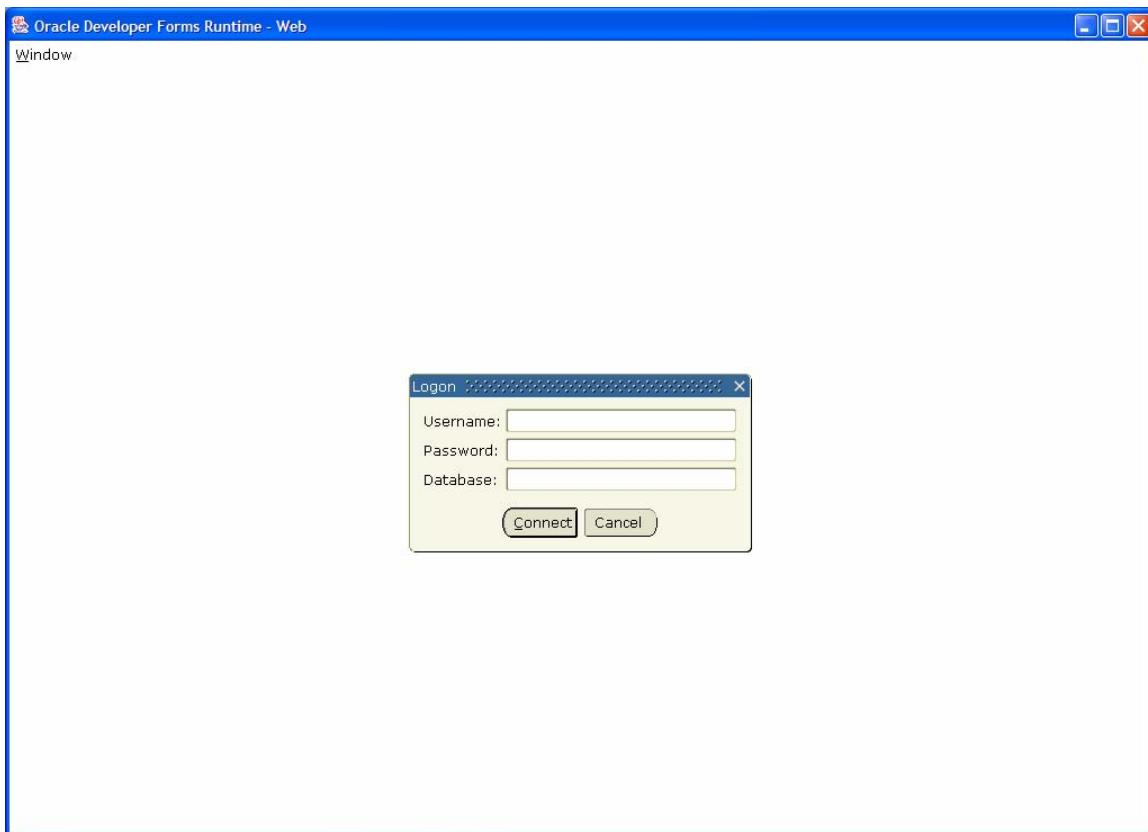
Your BANNER INB Username and Password

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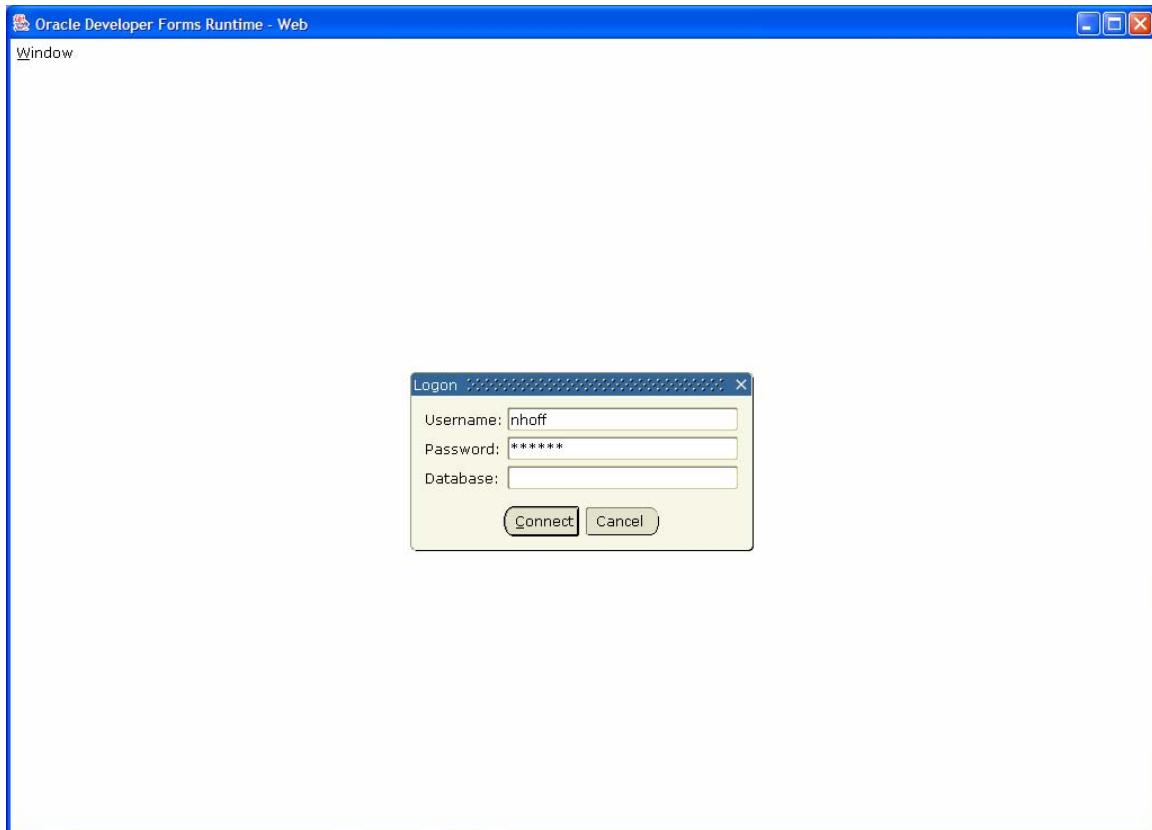
When logging out of BANNER INB make sure you log out by clicking on one of the "X"s in the upper right corner of the screen. Do not close the initial window as this will end your session abnormally and may cause problems with system resources. When logging out you should see the following screen:
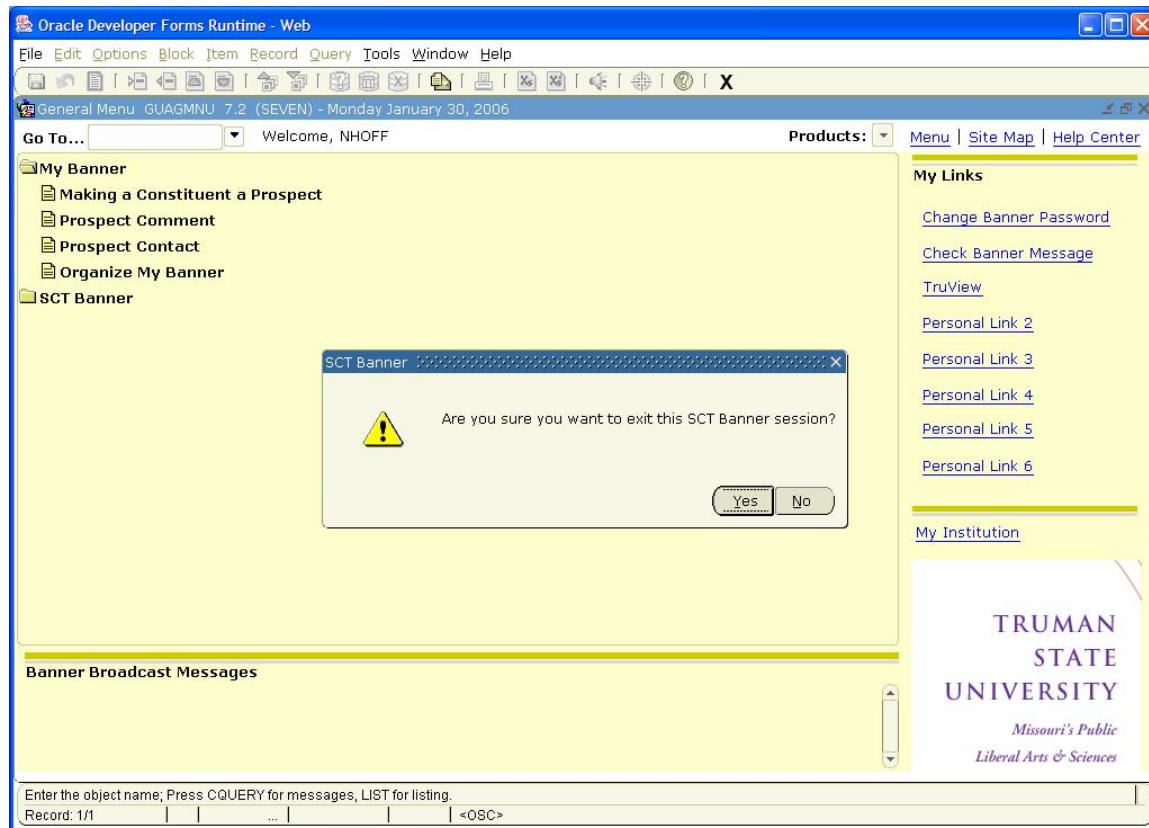
Truman-Specific Information

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 Course Reference Number 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.
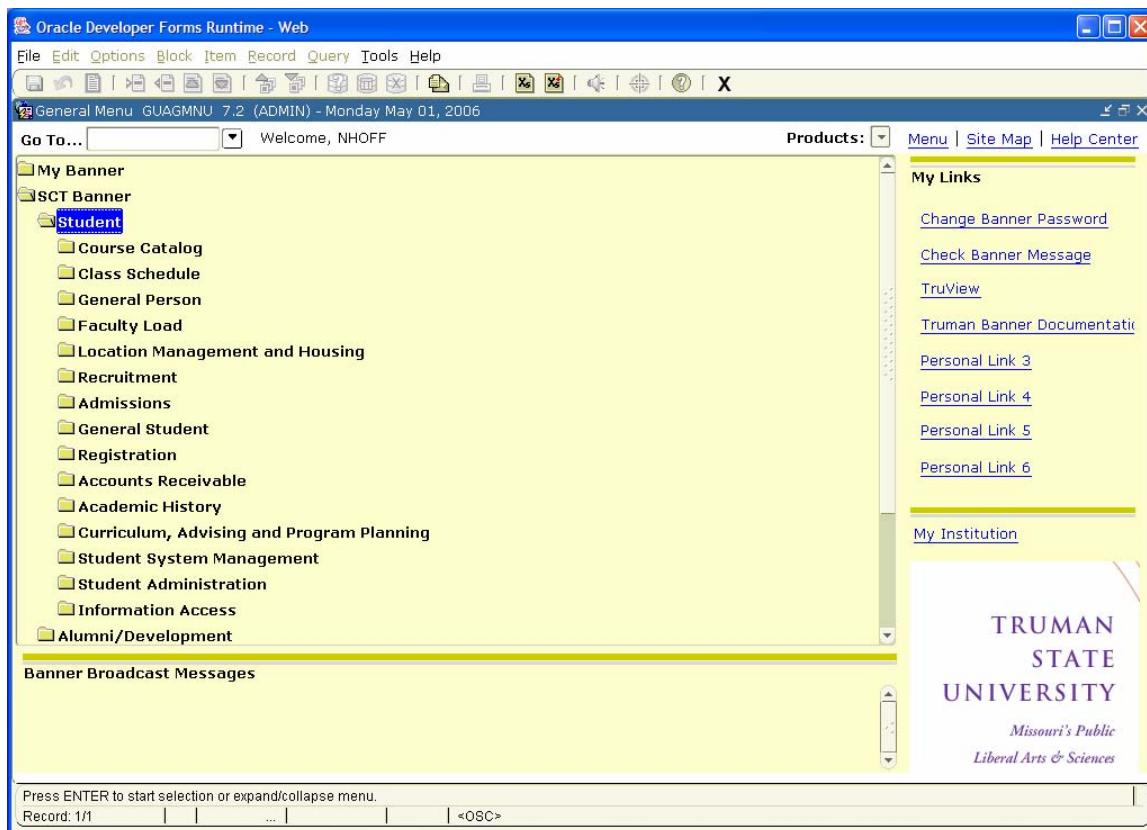
On the right-hand side of the screen you will see a menu area. This area allows you to quickly change your password, access the Banner Bookshelf and set up quick links to website that you commonly use. Instructions for setting up quick links appear later in this document. The My Institution link takes 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.

<u>Auto Hint Line</u>

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

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

<u>Multiple Matches:</u> 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.

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

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.

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.
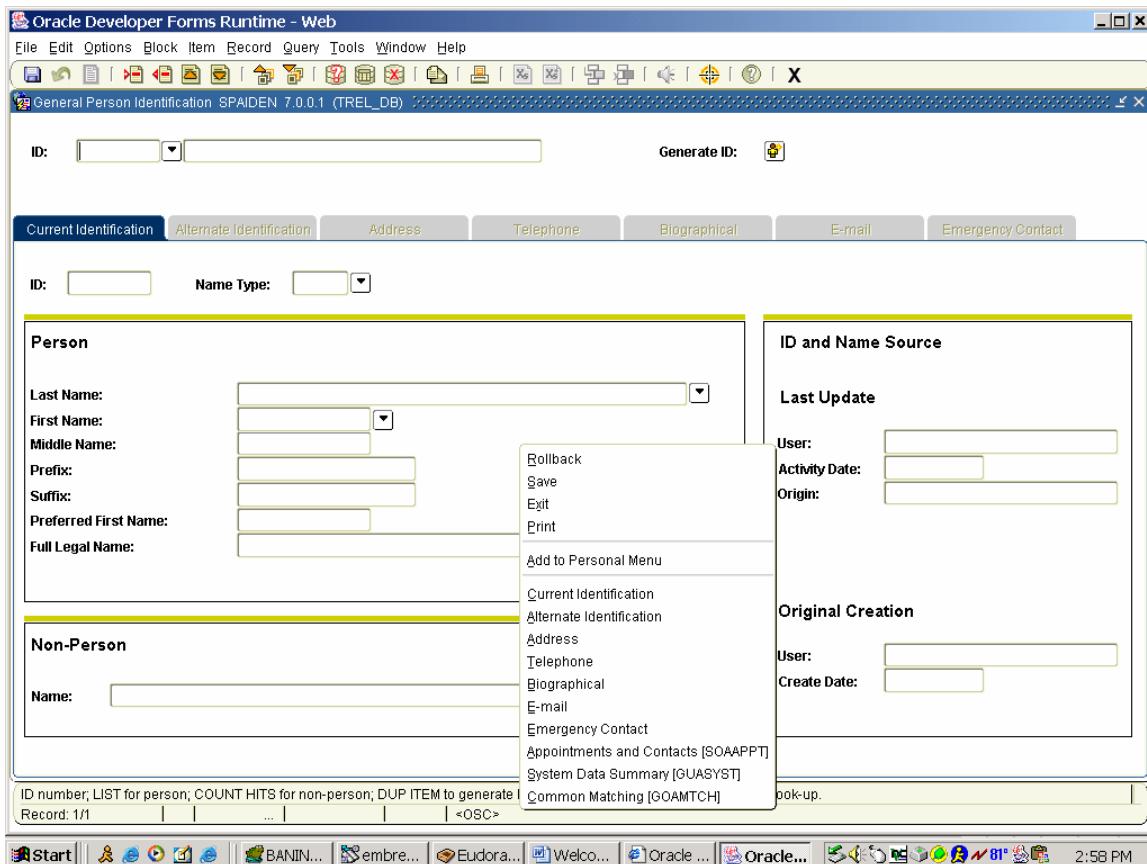

In addition, the Options drop down menu gives you the ability to Rollback, Save, Exit, Print and Add to Personal Menu (My Banner).

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.
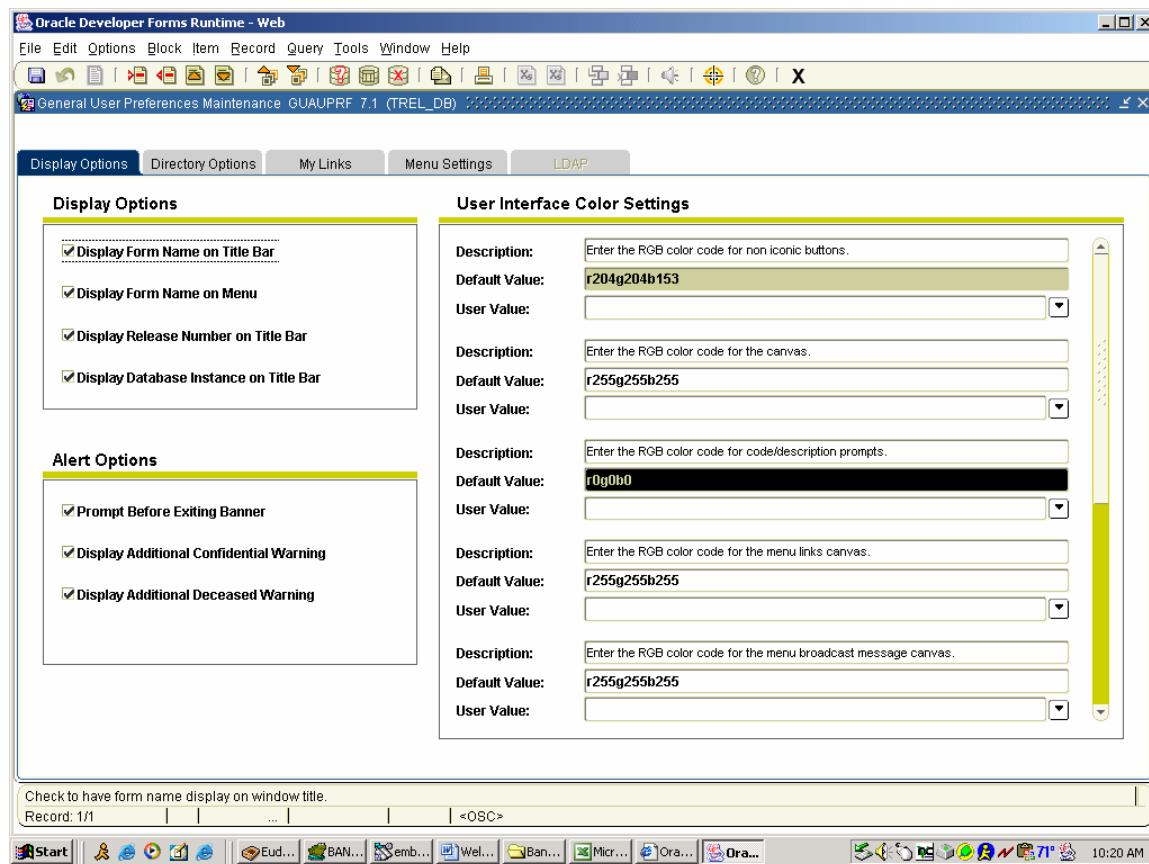
The third tab, My Links, allows you to set up the quick links on the GUAGMNU main menu form. Enter the link description and the link URL for each link you want to set up. Do not enter values for the "My Institution" link or "My Personal Link 1" or you will lose GUAGMNU access to Banner INB and the Banner 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.
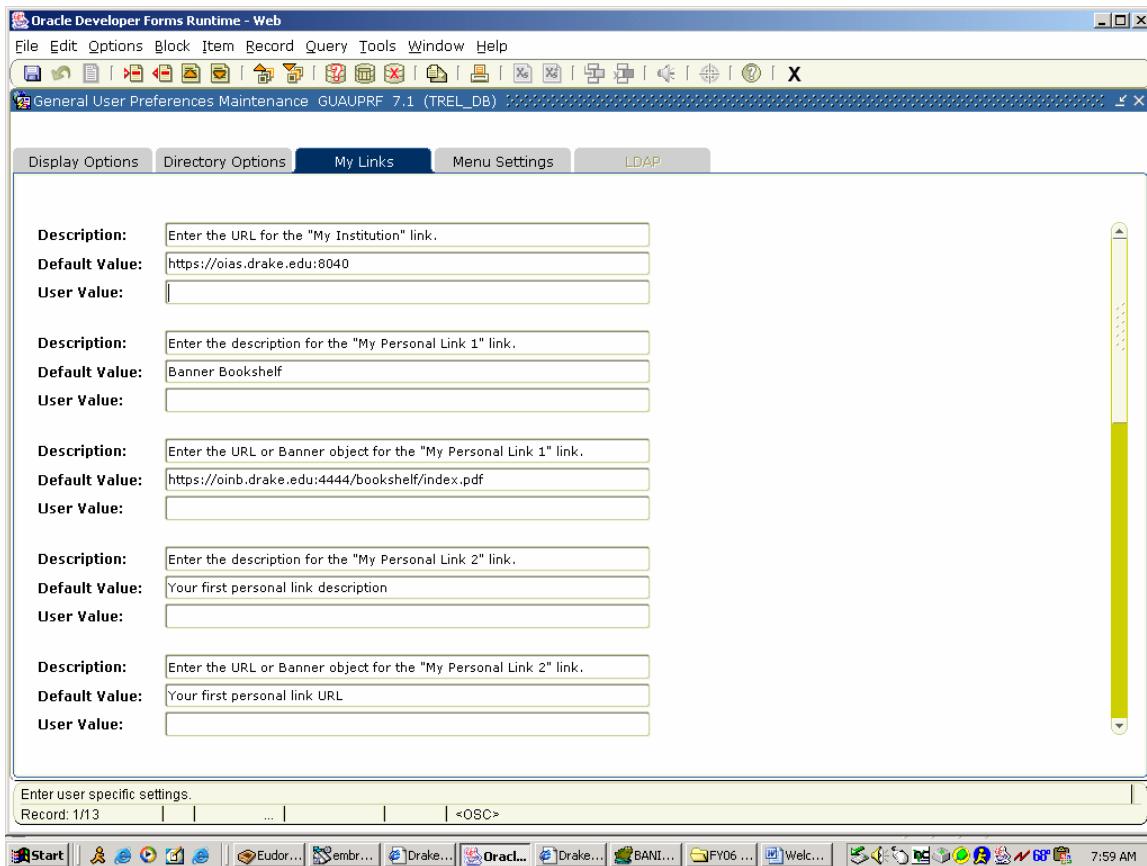
Navigating to Forms Shortcut

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.

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.
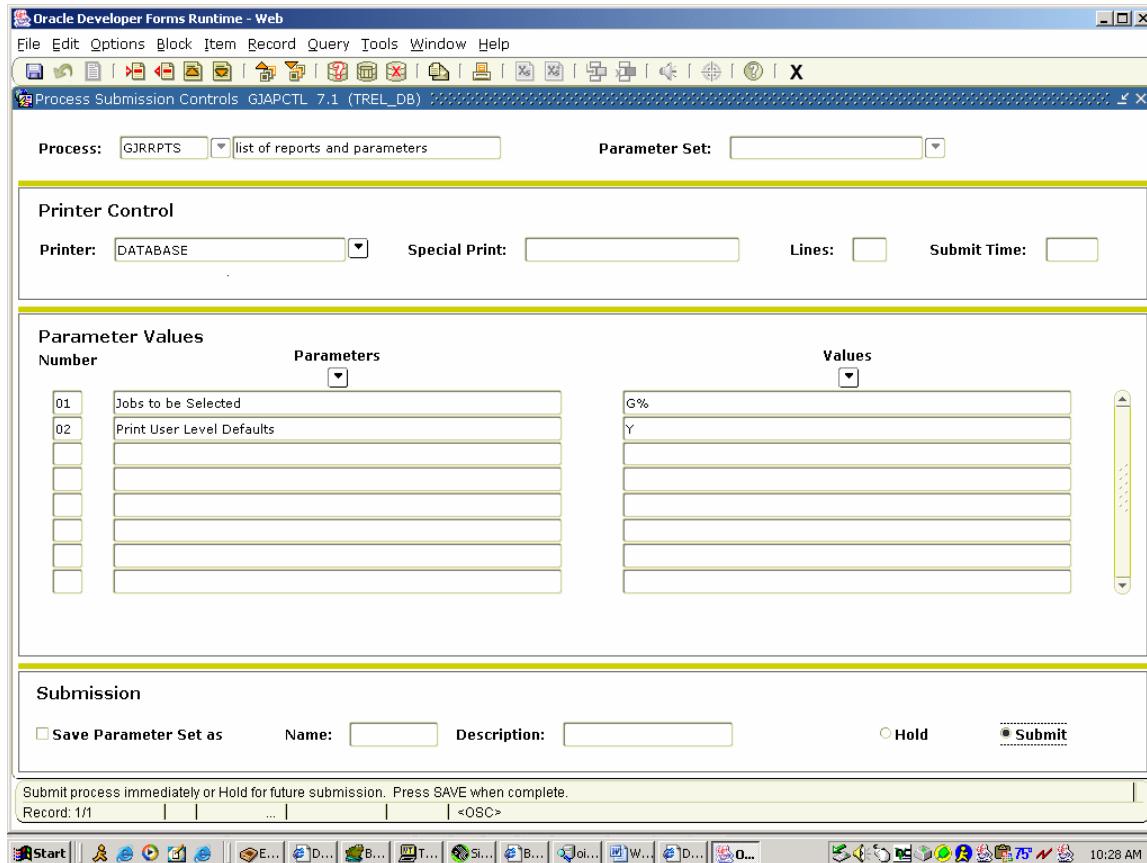
After the job has completed execution, select Review Output [GJIREVO] from the option menu.
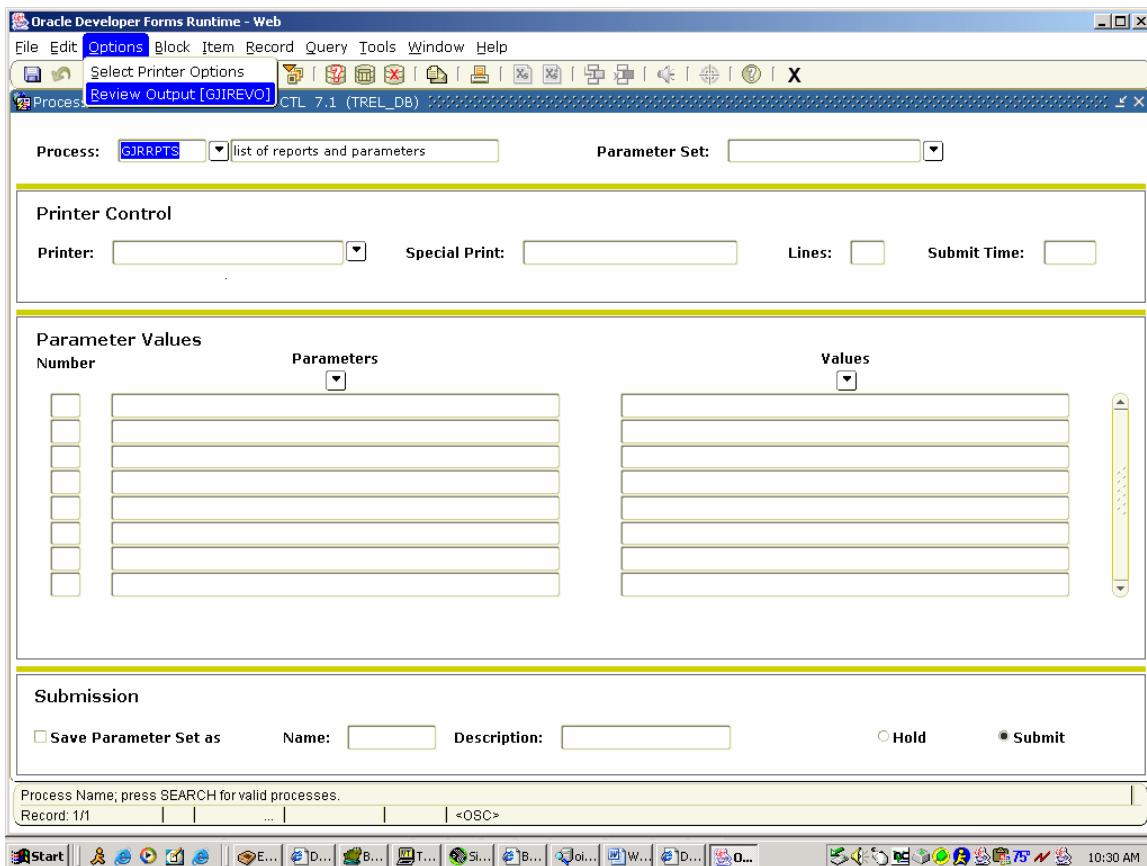
Select the file you wish to save from the list of file by clicking on the down arrow next to Number.
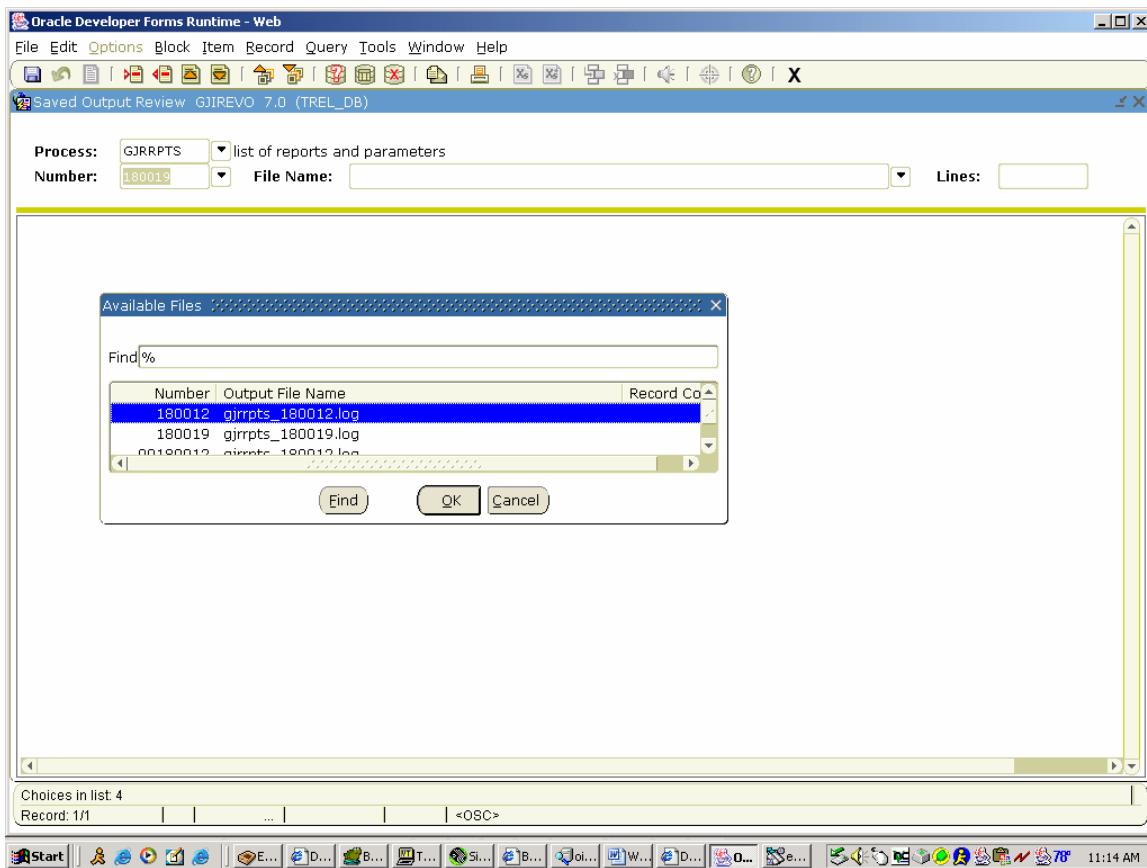
Click the Save icon on the tool bar.
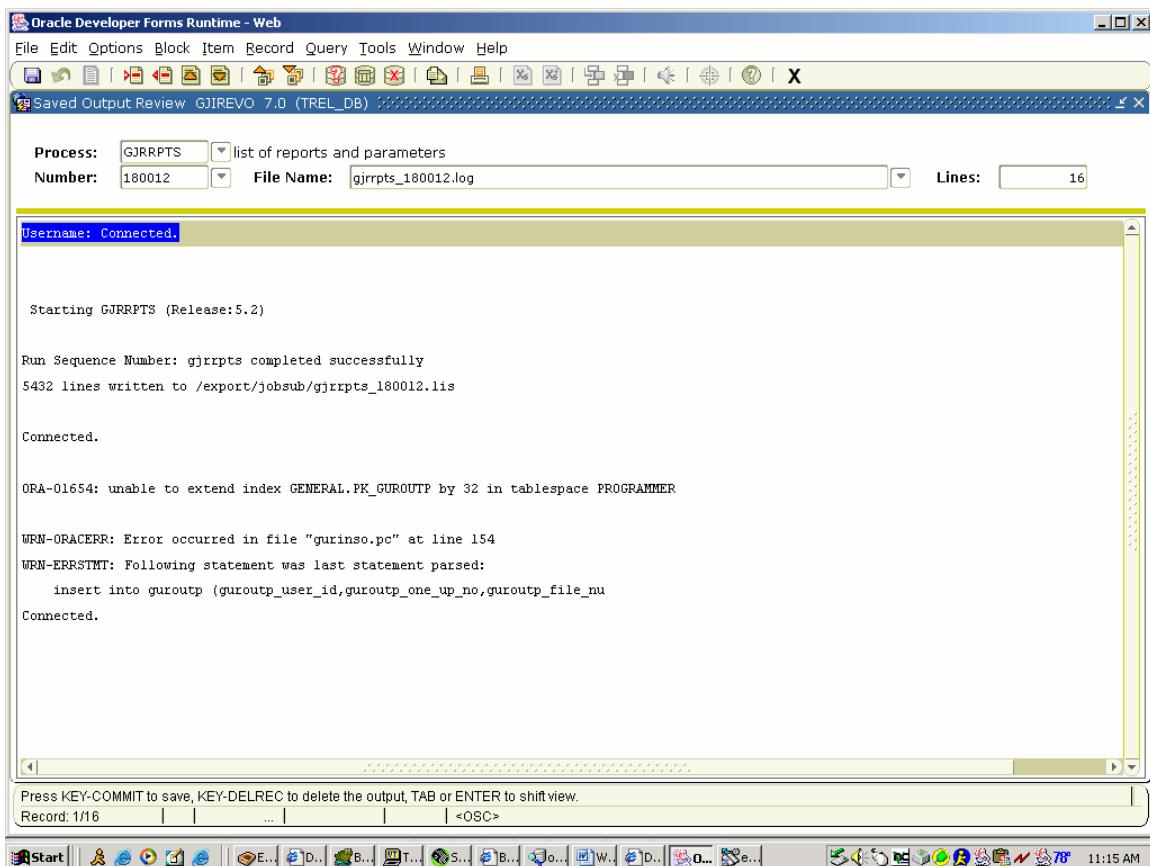
Click Yes.
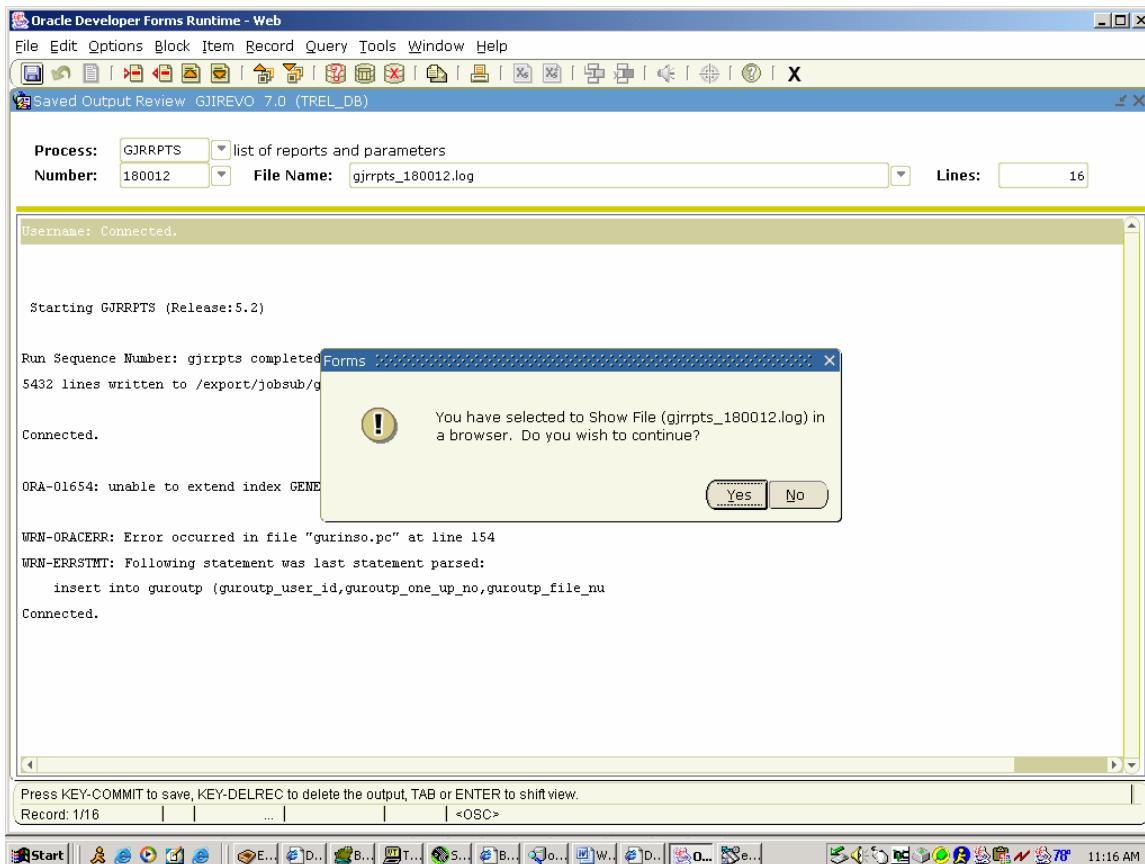
A new browser window will open with the data. To save the data to your Workstation click File on the browser menu and then select Save As. Specify the filename and the location on your workstation where you want the file saved. You will also need to specify that you want the file saved as TEXT.
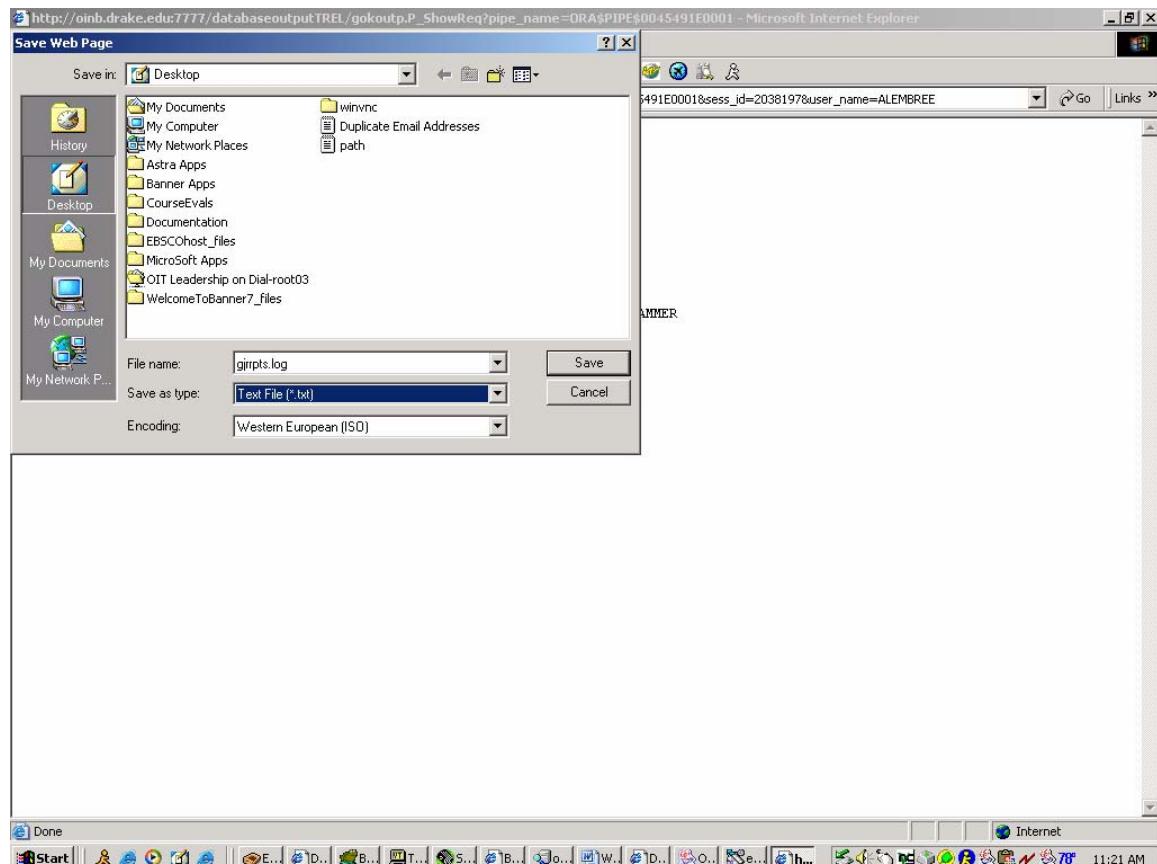
Changing Your BANNER INB Password

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
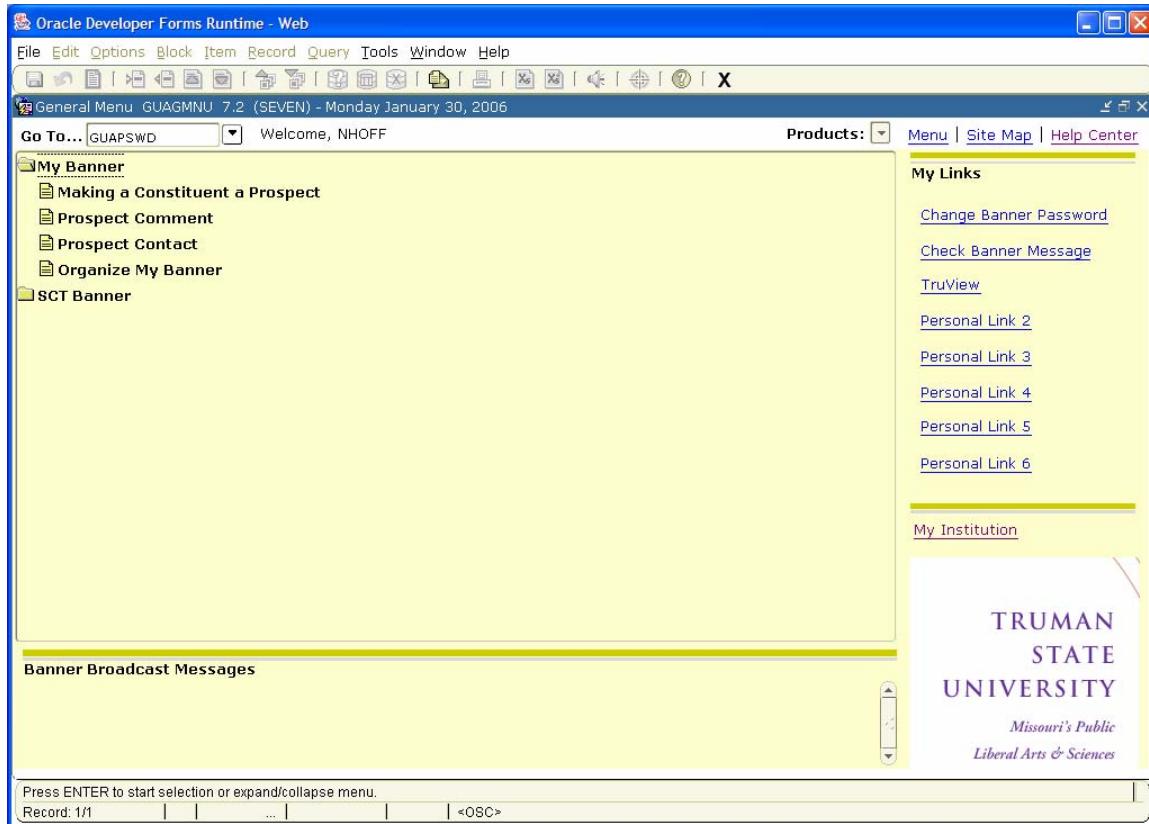
4. You will see the following screen appear.
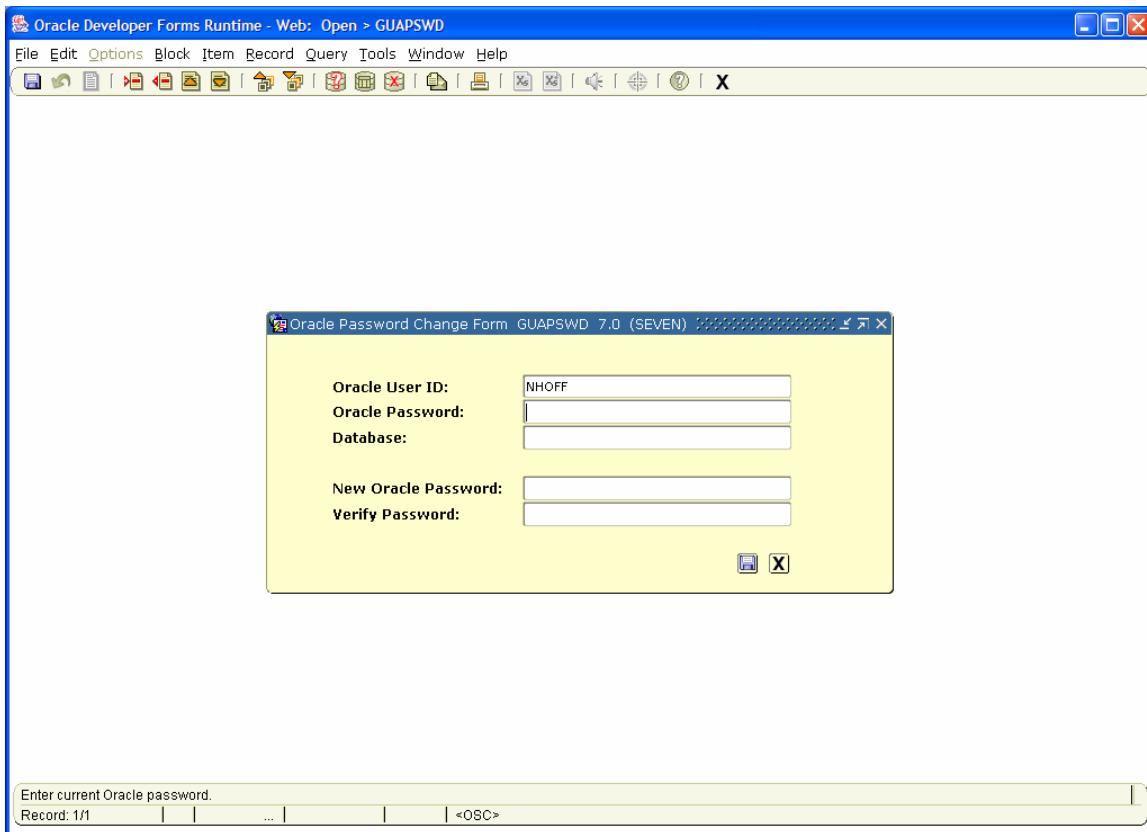
4.   Enter your **current** password in the Oracle Password box.
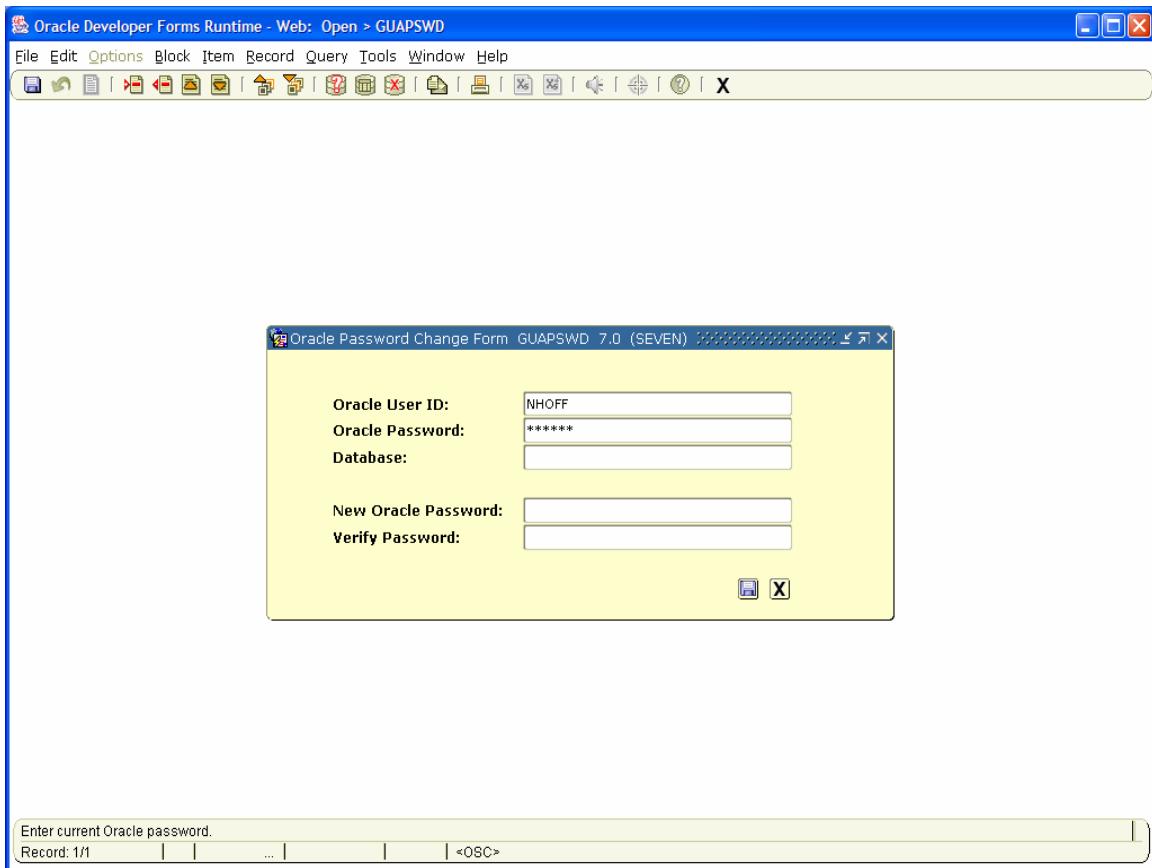
5.   Enter your NEW password in the New Oracle Password box.
6.   Enter your NEW password again in the Verify Password box.
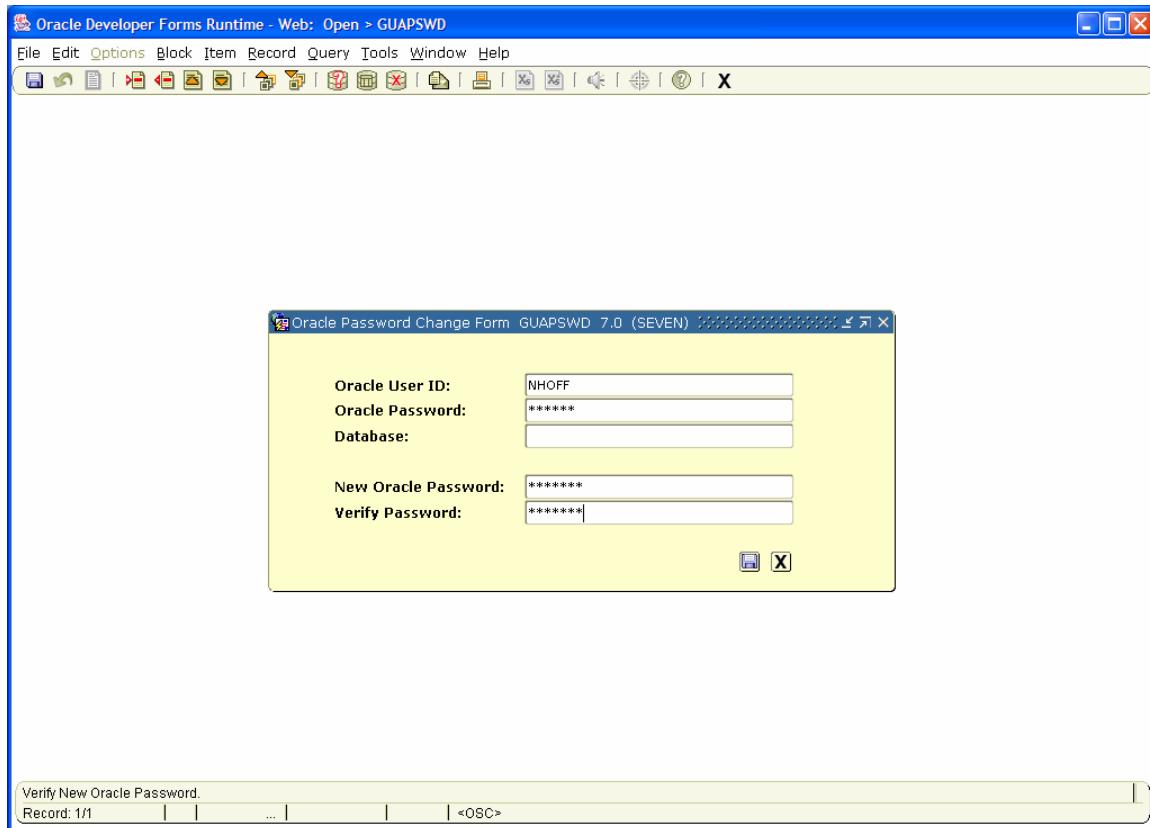
7.   Click on Disk icon at the bottom of the screen to SAVE your new password.

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.
       truview.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.
       truview.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:
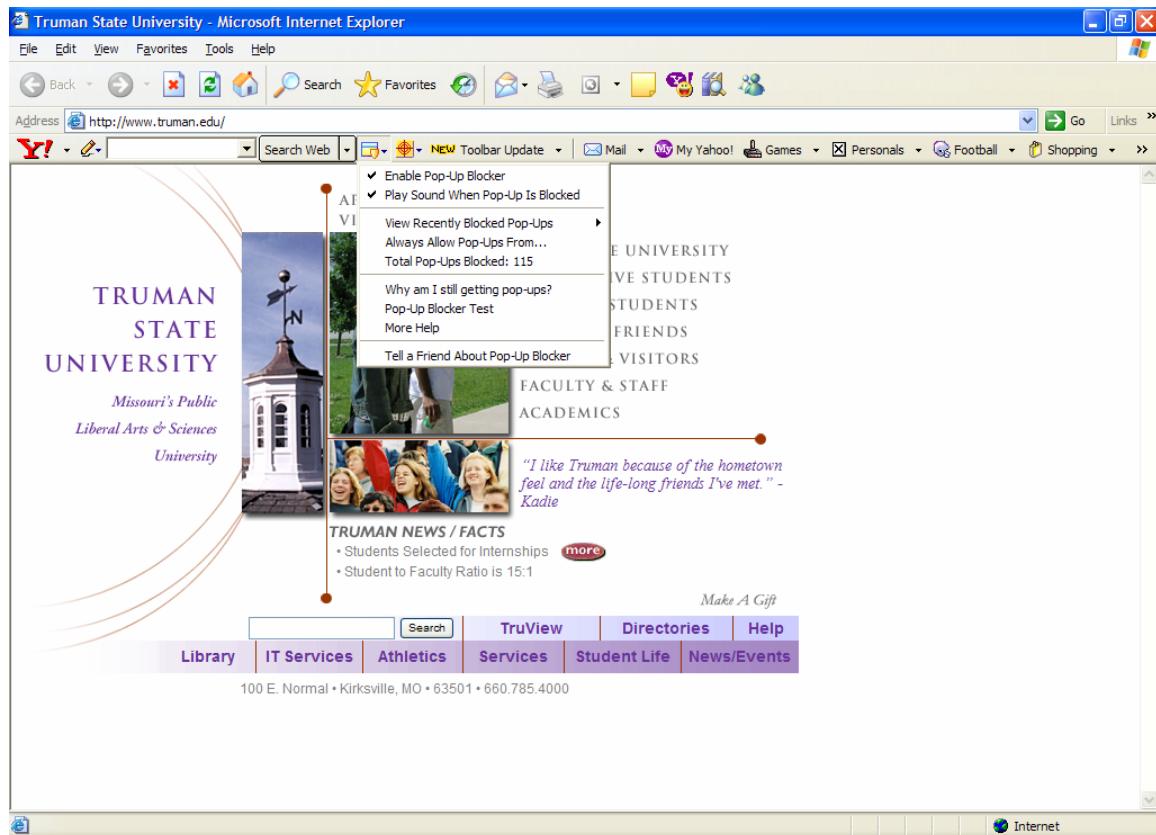

Click on "Always Allow Pop-Ups From" to see the Sources of Recently Blocked Pop-Ups. Click on the name of the source you wish to enable, and then click on the "Allow" button, followed by the "OK" button.

Yahoo! Pop-Up Blocker

Sources of Recently Blocked Pop-Ups:

truview.truman.edu

[Allow]

Always Allow Pop-Ups From These Sources:

[Remove]

[Help]   [Close]

Yahoo! Pop-Up Blocker

Always allow pop-ups from truview.truman.edu?

[OK]   [Cancel]

Yahoo! Pop-Up Blocker

Sources of Recently Blocked Pop-Ups:

truview.truman.edu

Allow

Always Allow Pop-Ups From These Sources:

truview.truman.edu

Remove

Help

Close

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:

Google Toolbar Popup Blocked Introduction

Avoid popups thanks to the Popup Blocker

The Google Toolbar stops web sites from showing you popup windows.

You will know a popup has been blocked when:

- You see this icon:

  1 blocked

- This mouse cursor:

- And hear a sound alert

Popup windows can occasionally contain useful information. Click the popup blocker button to disable it for a site.

More Info

OK

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
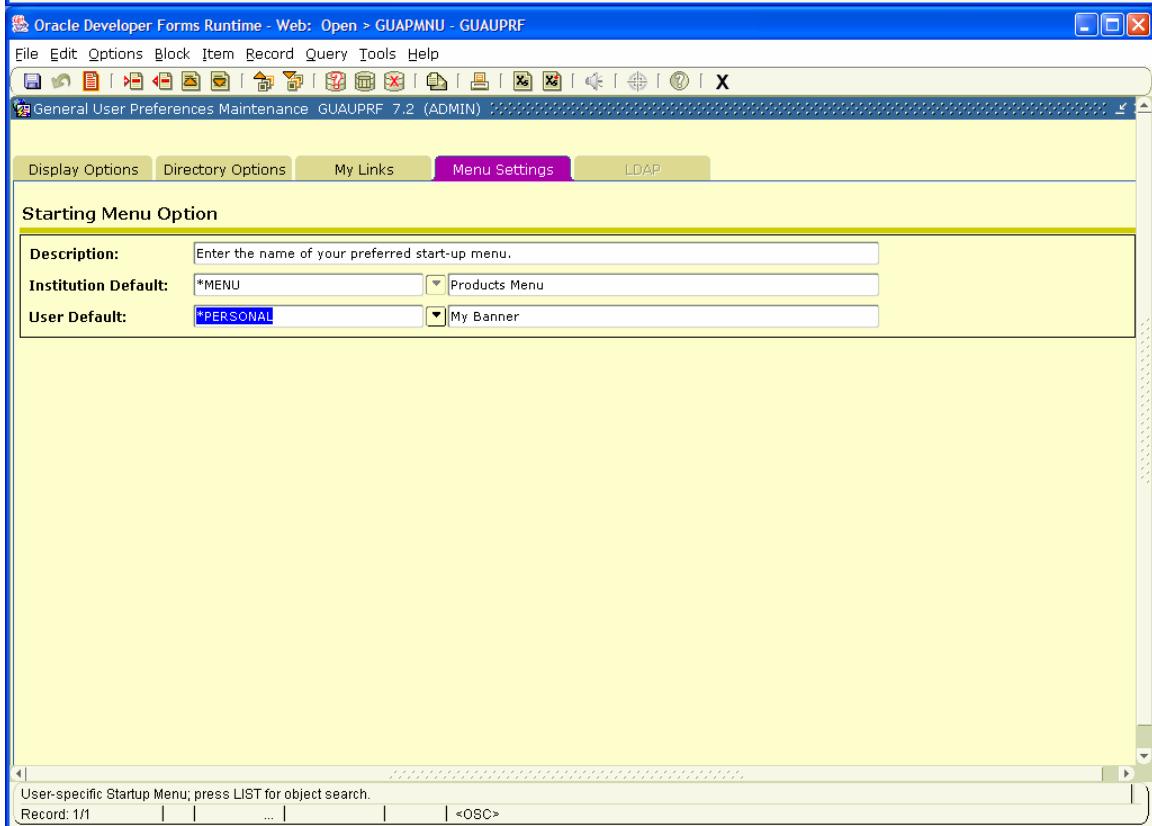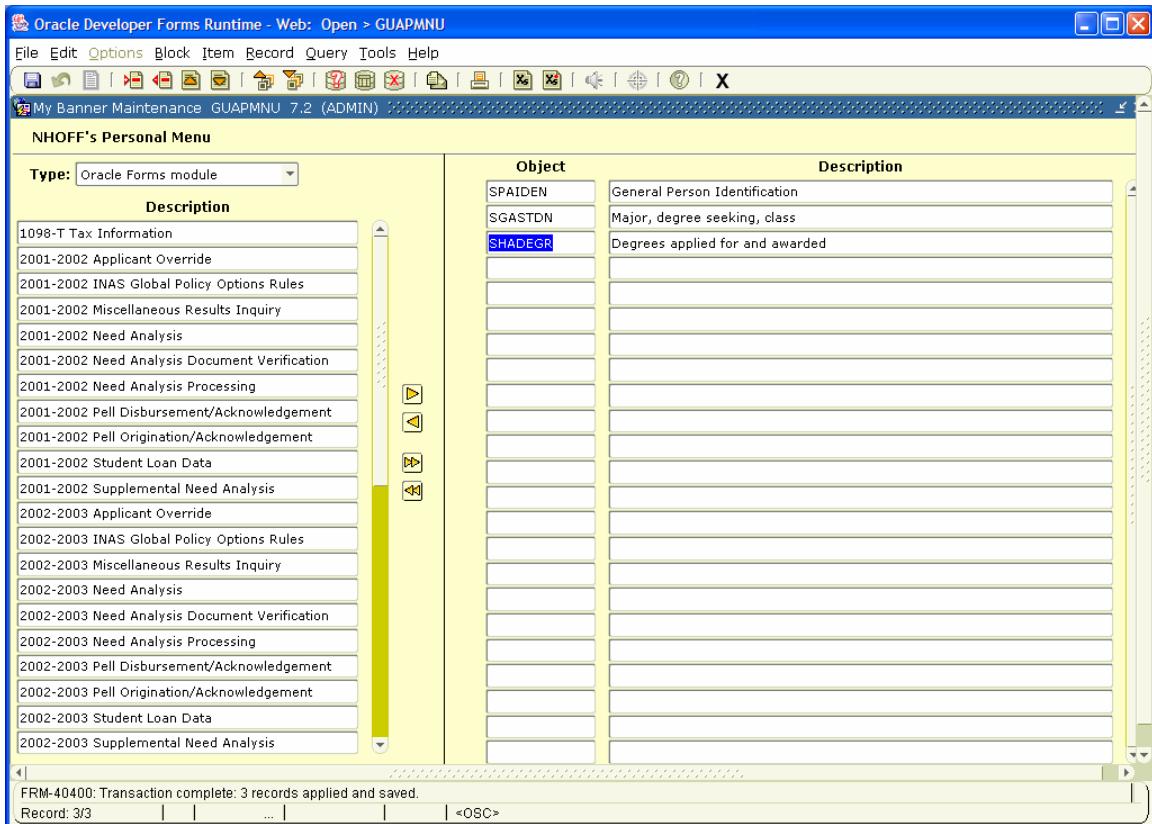
APPENDIX C: BANNER ONLINE HELP

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.
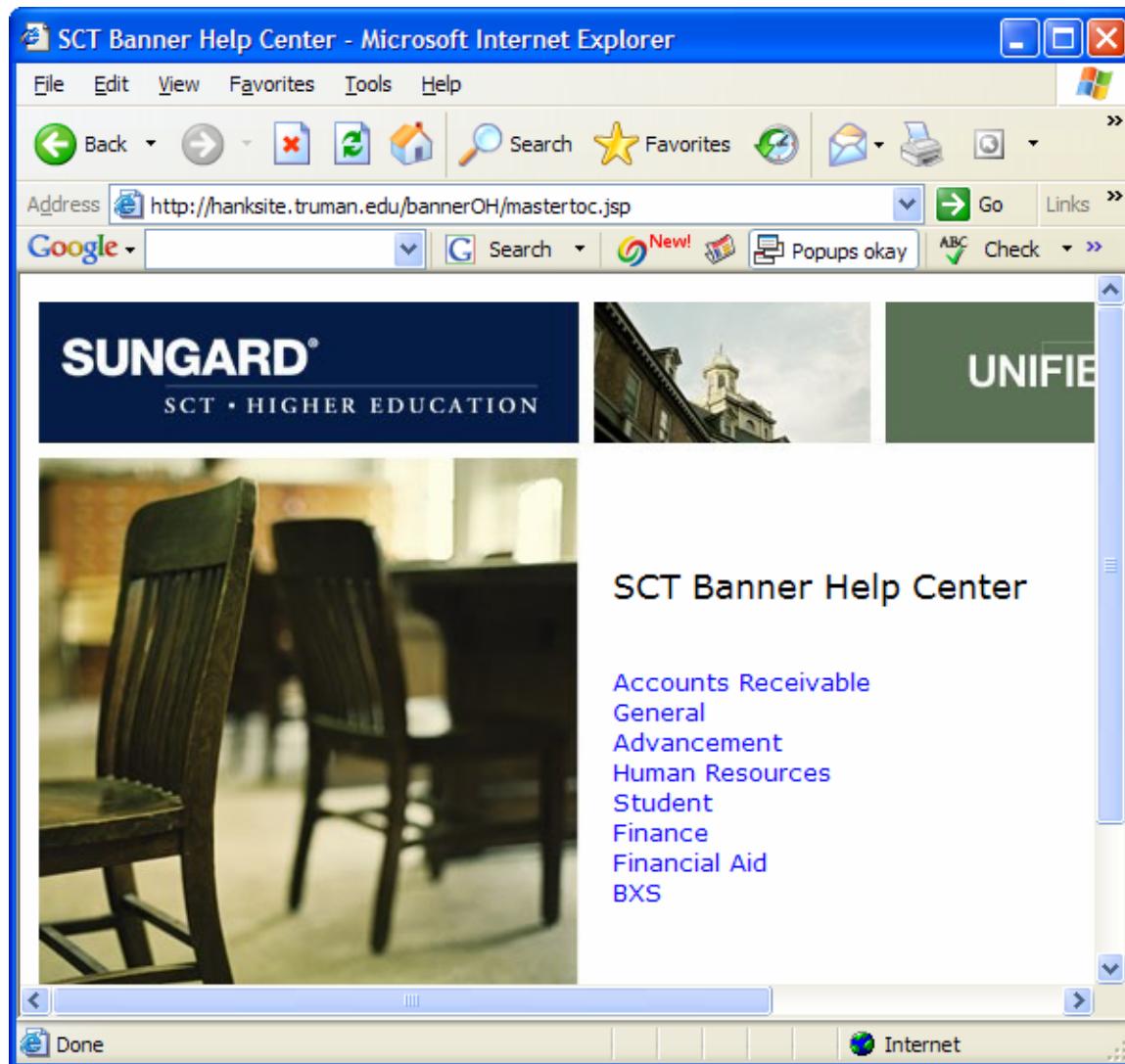
On Line Help can also be accessed from the Help menu on any form from the menu bar at the top of the form.
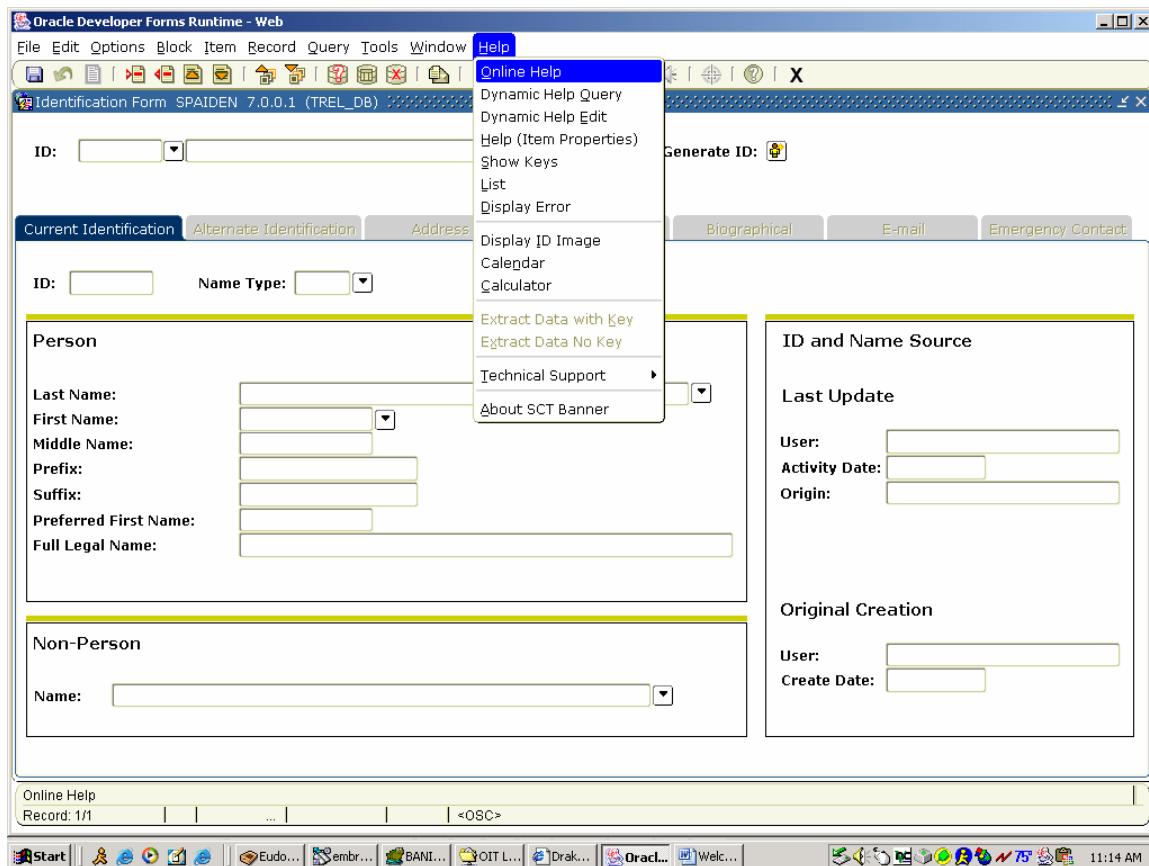
This will take you to the specific help for the form that you are currently working in.