

BANNER 7 UPGRADE HANDBOOK

Effective February 20, 2006

Test site currently available

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Revised with permission from Drake University Office of Information Technology

BANNER is Changing!

With the upgrade from Banner 6 to Banner 7, the desktop client is no longer supported. Your desktop icons for Banner will no longer work and you should not attempt to use them. The Banner 7 client is now 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 and Mozilla Firefox
- 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 or helpdesk@truman.edu if you need assistance in disabling your popup blocker(s).

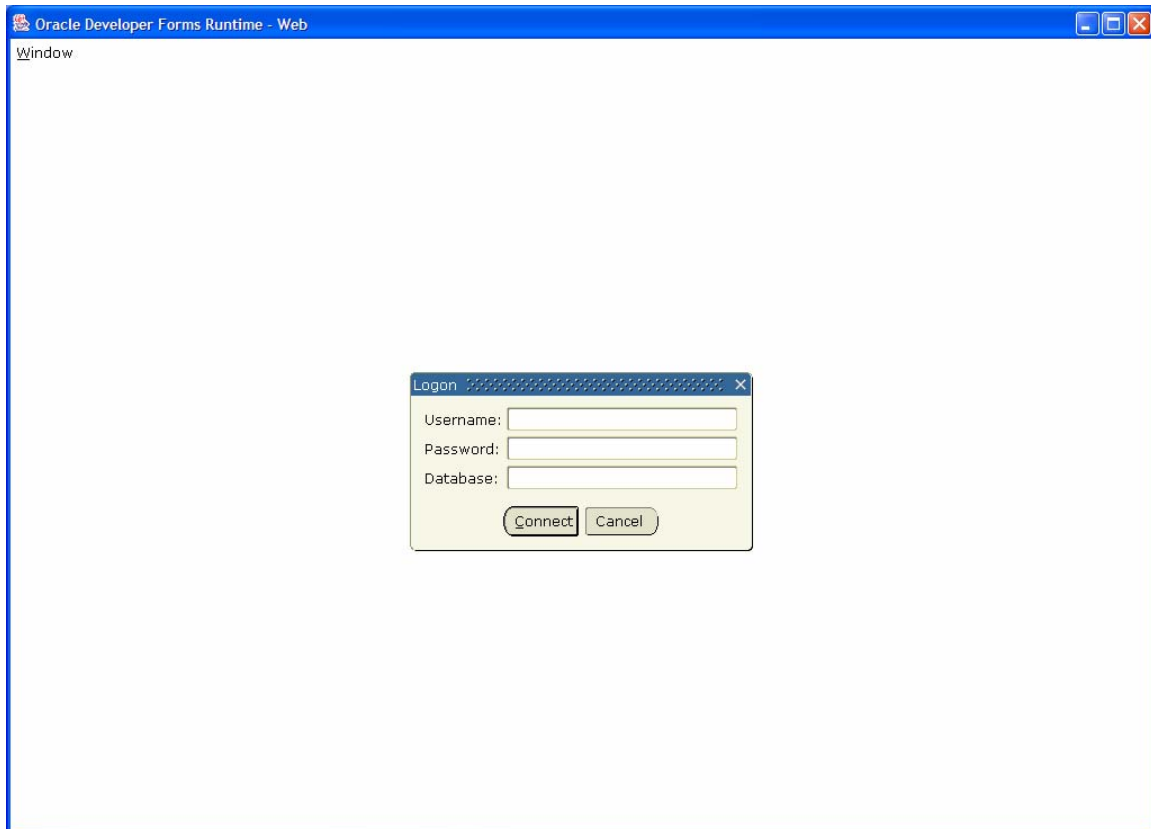
In addition to being browser based, the way BANNER forms operate is also changing. These changes are outlined in this document to assist you in accessing BANNER and navigating through the forms. If you have any questions about your browser or need assistance regarding these procedures, please call the Help Desk at extension 4544 or email them at helpdesk@truman.edu.

Accessing the BANNER INB Web Client – Test Site

1. Launch your browser
2. Enter http://hanksite.truman.edu:7778/forms90/f90servlet?config=onyx_ban7 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. The URL for the administrative site will be provided via e-mail to all Banner administrative system users prior to February 20, 2006.
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.

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:



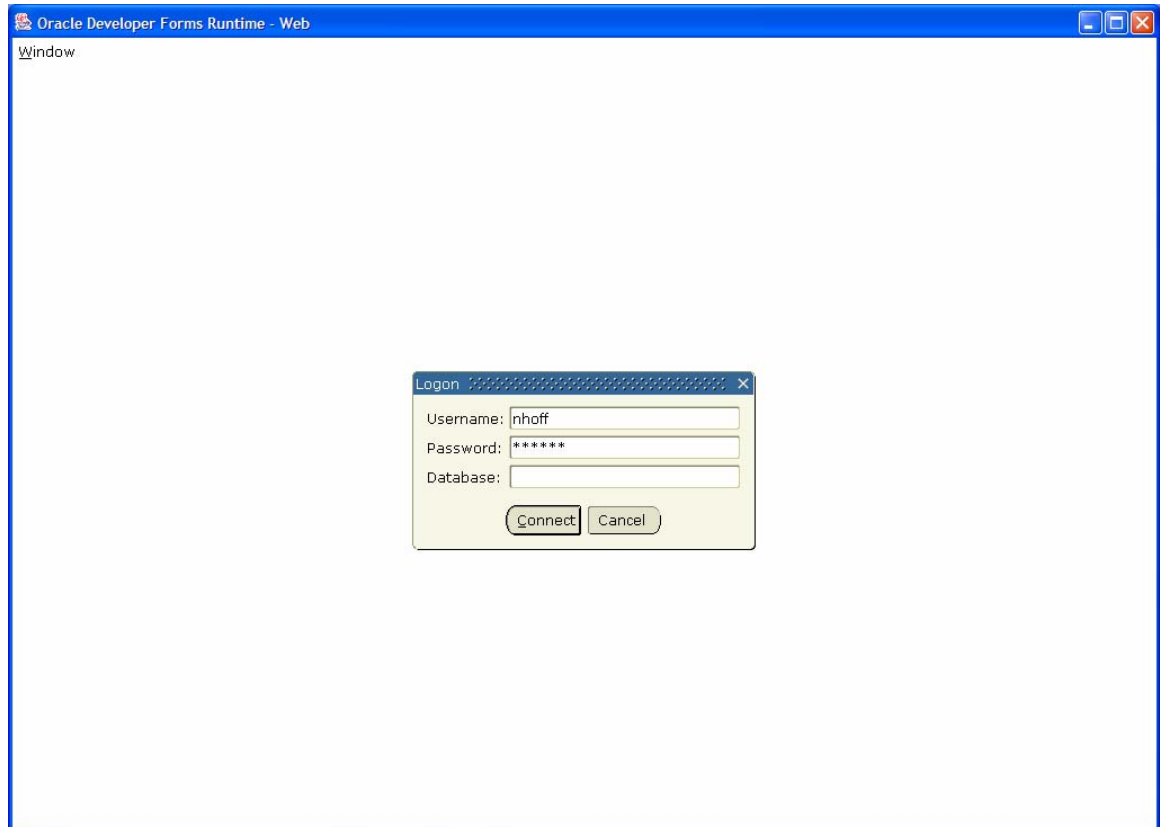
Your BANNER INB Username and Password

Your BANNER INB username and password have not changed with the upgrade to Banner 7. You should continue using your existing username and password. However, should you choose to access the test site to familiarize yourself with navigating Banner 7, you will use your Banner ADMIN password as of the end of November.

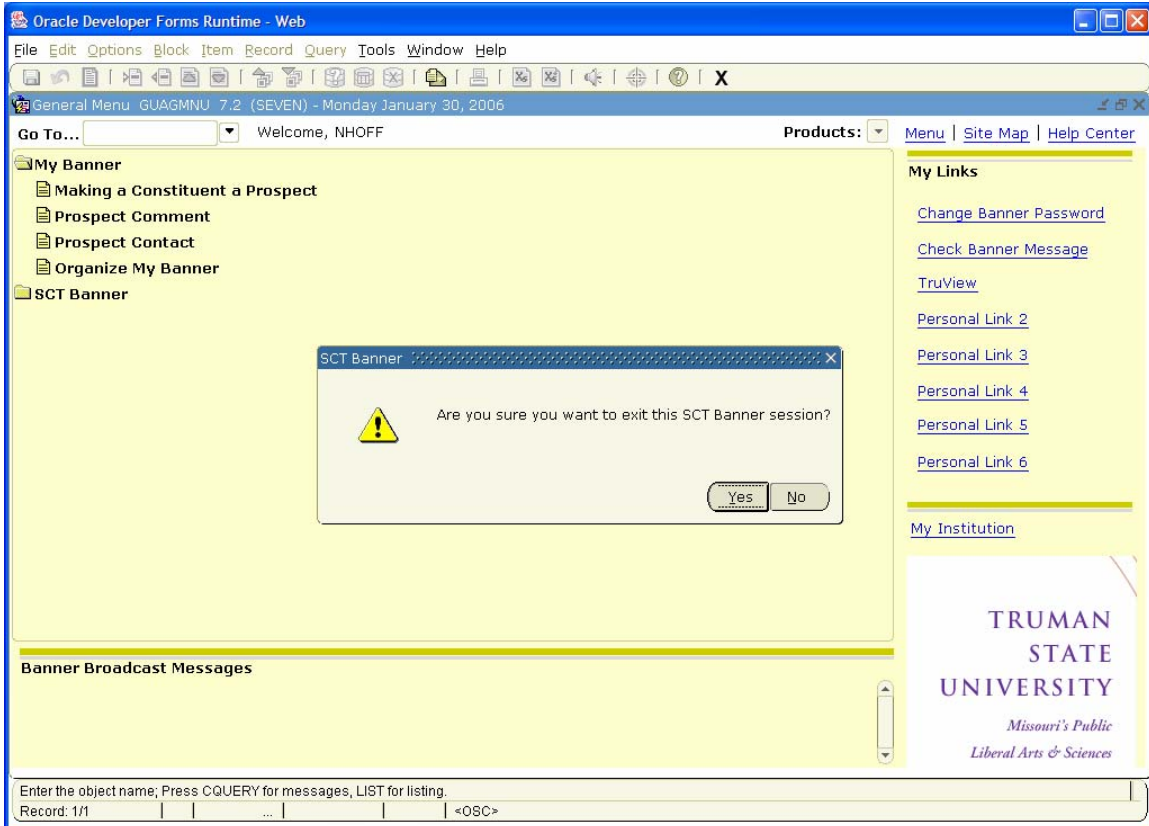
As a reminder, you will be required to change your BANNER INB password every 90 days. You will be reminded again by the Office of Information Technology Services prior to the enforcement of password changes. Instructions for changing your BANNER INB password have been included in this document for your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

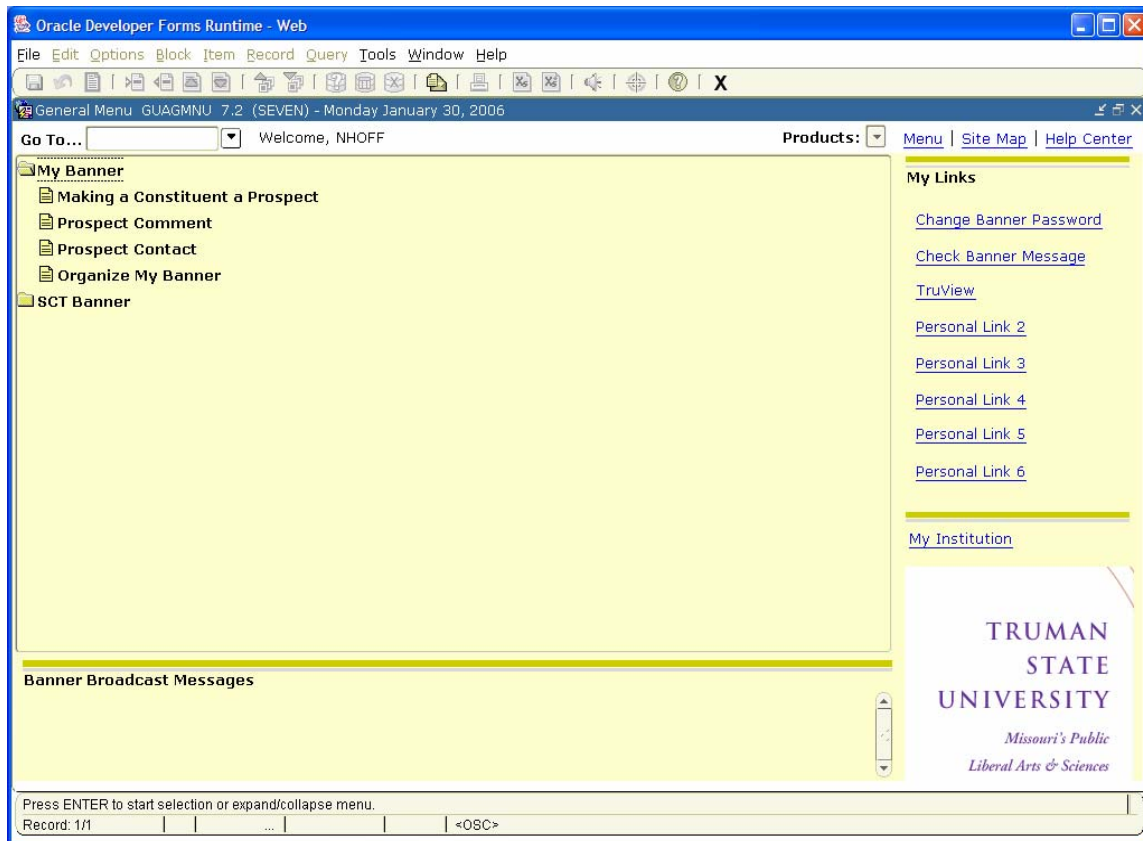


Changes in BANNER INB Navigation

GUAGMNU – General Menu

The first changes you will see are in GUAGMNU. At the very top of the page, you will notice the tool bar is now present on the menu screen. In fact, the tool bar is now present on every screen and does not have to be regenerated each time you open a new form. This design change was done to improve performance.

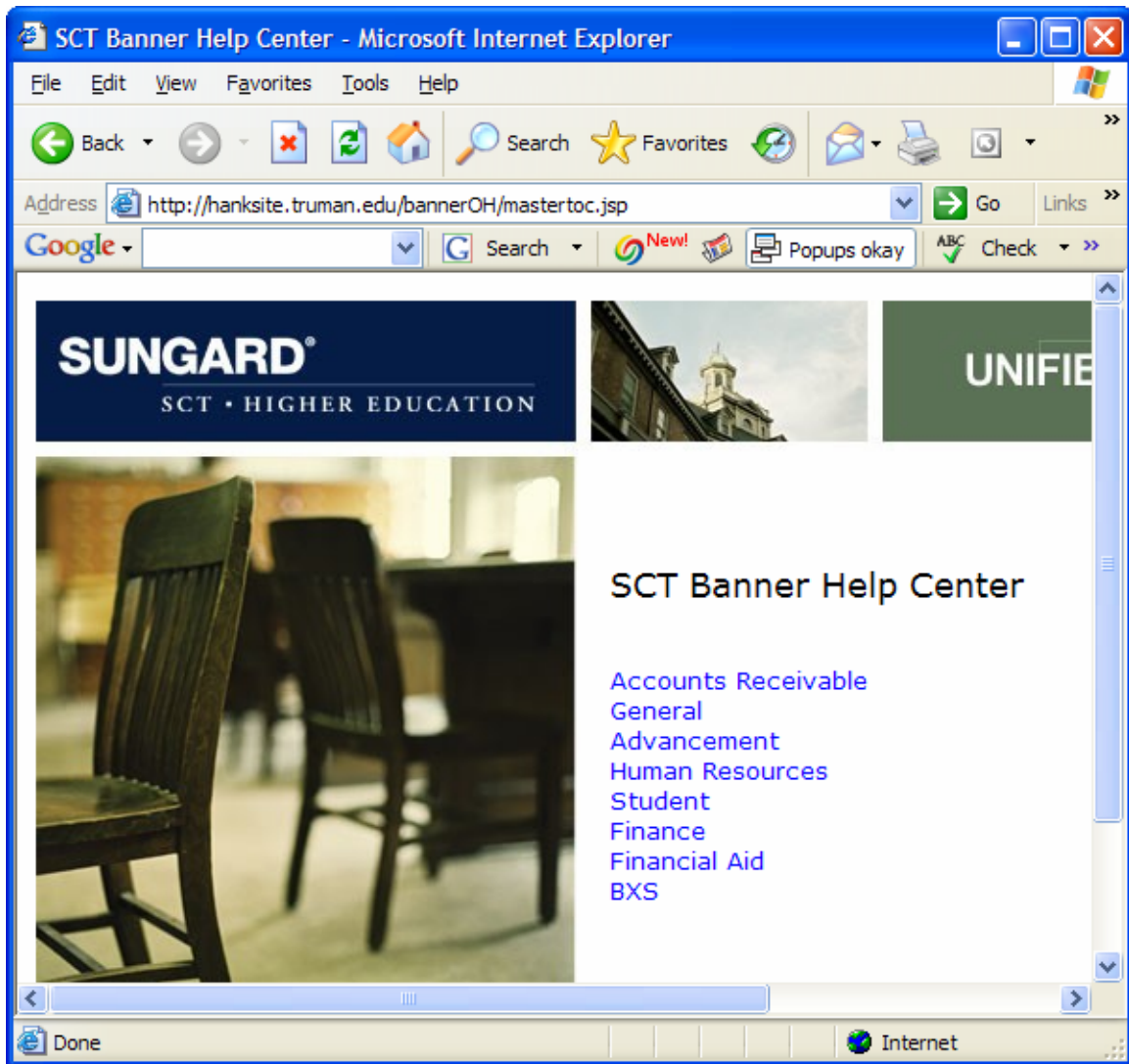
You will see the “Go” Box and Menu Tree on the left-hand side of the screen, much as they appeared in Banner 6. A new feature of the “Go” Box is that you can now use the up and down arrow keys to scroll through forms you have recently opened.



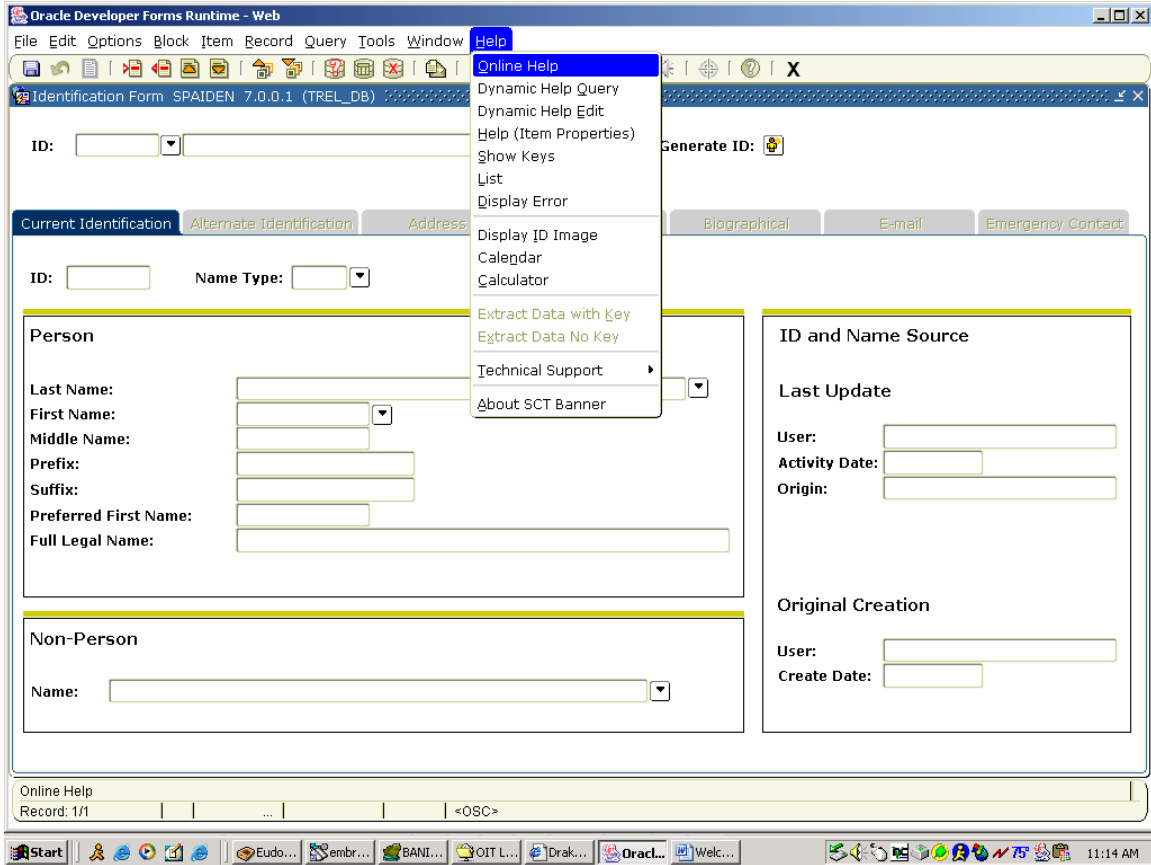
On the right-hand side of the screen you will see a new menu area. This area allows you to quickly change your password, access the Banner Bookshelf and set up quick links to website that you commonly use. Instructions for setting up quick links appear later in this document. The My Institution link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

On Line Help

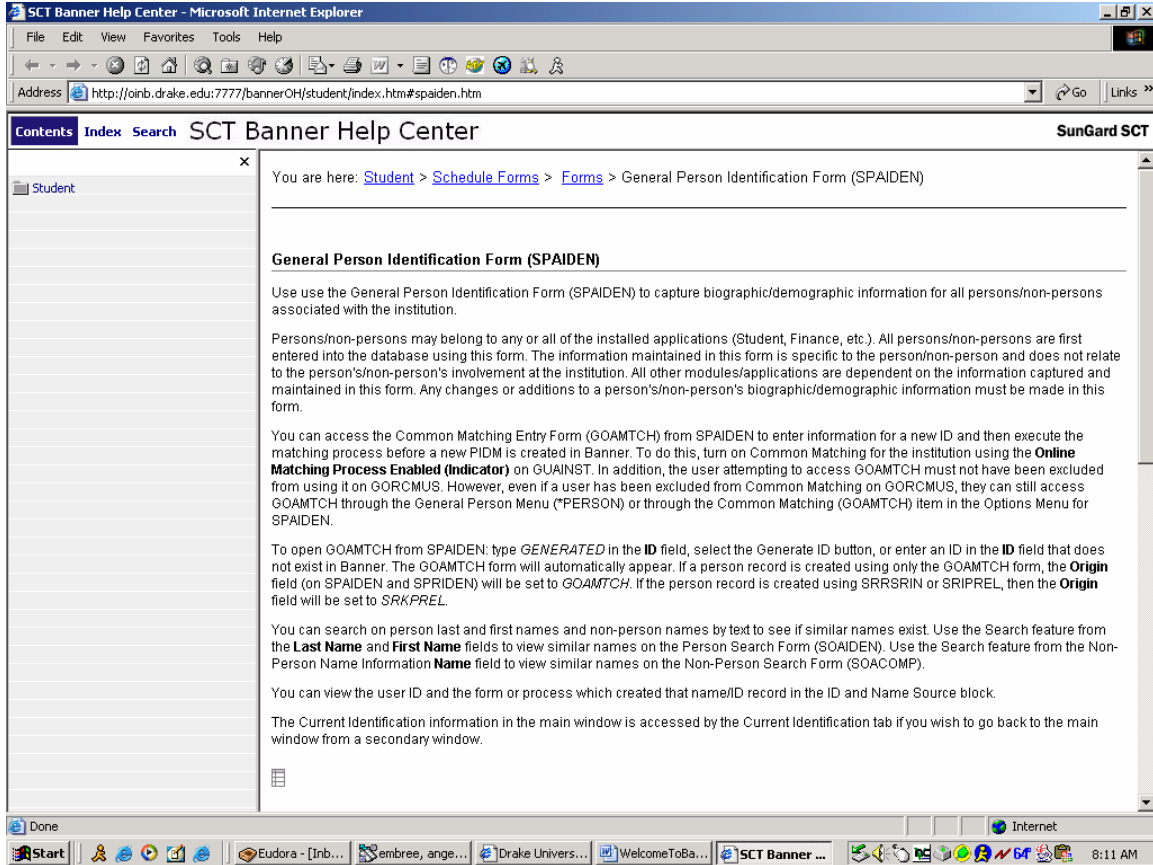
There is now a link to the BANNER INB Help Center on GUAGMNU. Clicking on this link will open a separate window containing the main page for On Line Help. If you use a pop up blocker, you will need to make sure you have it disabled or the On Line Help window will not open! On Line Help contains valuable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



Tabbed Forms

Another feature of Banner 7 is that many forms are now 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 forms, you do not have to use the options menu or scroll as you did with Banner 6. For example, clicking the E-mail tab in the SPAIDEN form will take you to GOAEMAL.

The screenshot displays the Oracle Developer Forms Runtime interface for the SPAIDEN form. The window title is "Oracle Developer Forms Runtime - Web: Open > SPAIDEN". The menu bar includes File, Edit, Options, Block, Item, Record, Query, Tools, Window, and Help. The address bar shows "General Person Identification SPAIDEN 7.2 (SEVEN)".

The form is currently displaying the "E-mail" tab, which is highlighted in purple. The "E-mail" tab is one of several tabs: "Current Identification", "Alternate Identification", "Address", "Telephone", "Biographical", "E-mail", and "Emergency Contact".

The "E-mail" tab contains three email entries:

- Entry 1:** E-mail Type: AL (Alumni), E-mail Address: nhoff@truman.edu, Preferred (checked), Inactivate (unchecked), Display on Web (unchecked), URL (unchecked), Activity Date: 07-JUL-2005, User: Conversion.
- Entry 2:** E-mail Type: CA (Official Campus e-mail Address for Faculty/Staff), E-mail Address: nhoff@truman.edu, Preferred (checked), Inactivate (unchecked), Display on Web (checked), URL (unchecked), Activity Date: 17-JUN-2004, User: CONVERSION.
- Entry 3:** E-mail Type: E1 (Employment 1 - Advancement), E-mail Address: nhoff@truman.edu, Preferred (unchecked), Inactivate (unchecked), Display on Web (checked), URL (unchecked), Activity Date: 19-JUL-2005, User: Conversion.

The status bar at the bottom indicates "E-mail Type; LIST for available types." and "Record: 1/4".

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

Oracle Developer Forms Runtime - Web: Open > SPAIDEN

File Edit Options Block Item Record Query Tools Window Help

General Person Identification SPAIDEN 7.2 (SEVEN)

ID: 000010116 Hoffman, Nancy J. Generate ID:

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

ID: 000010116 Name Type:

Person

Last Name: Hoffman
First Name: Nancy
Middle Name: J.
Prefix: Ms.
Suffix:
Preferred First Name:
Full Legal Name:

Non-Person

Name:

ID and Name Source

Last Update

User: CONVERSION
Activity Date: 27-JUN-2002
Origin: CONV

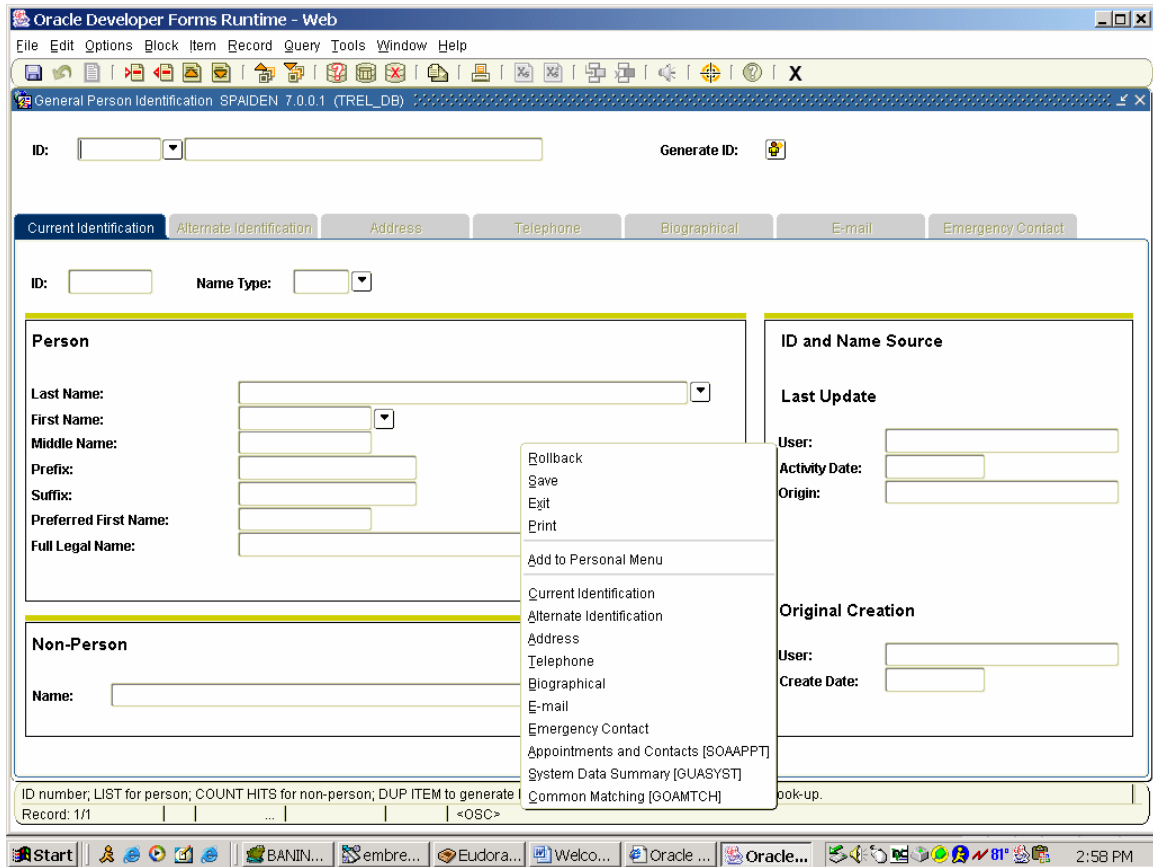
Original Creation

User:
Create Date:

Current identification number, overtyping to change.
Record: 1/1 ... <OSC>

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.

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Tools Window Help

General User Preferences Maintenance GUAUPRF 7.1 (TREL_DB)

Display Options Directory Options My Links Menu Settings LDAP

Display Options

- Display Form Name on Title Bar
- Display Form Name on Menu
- Display Release Number on Title Bar
- Display Database Instance on Title Bar

Alert Options

- Prompt Before Exiting Banner
- Display Additional Confidential Warning
- Display Additional Deceased Warning

User Interface Color Settings

Description: Enter the RGB color code for non iconic buttons.
Default Value: r204g204b153
User Value: [Dropdown]

Description: Enter the RGB color code for the canvas.
Default Value: r255g255b255
User Value: [Dropdown]

Description: Enter the RGB color code for code/description prompts.
Default Value: r0g0b0
User Value: [Dropdown]

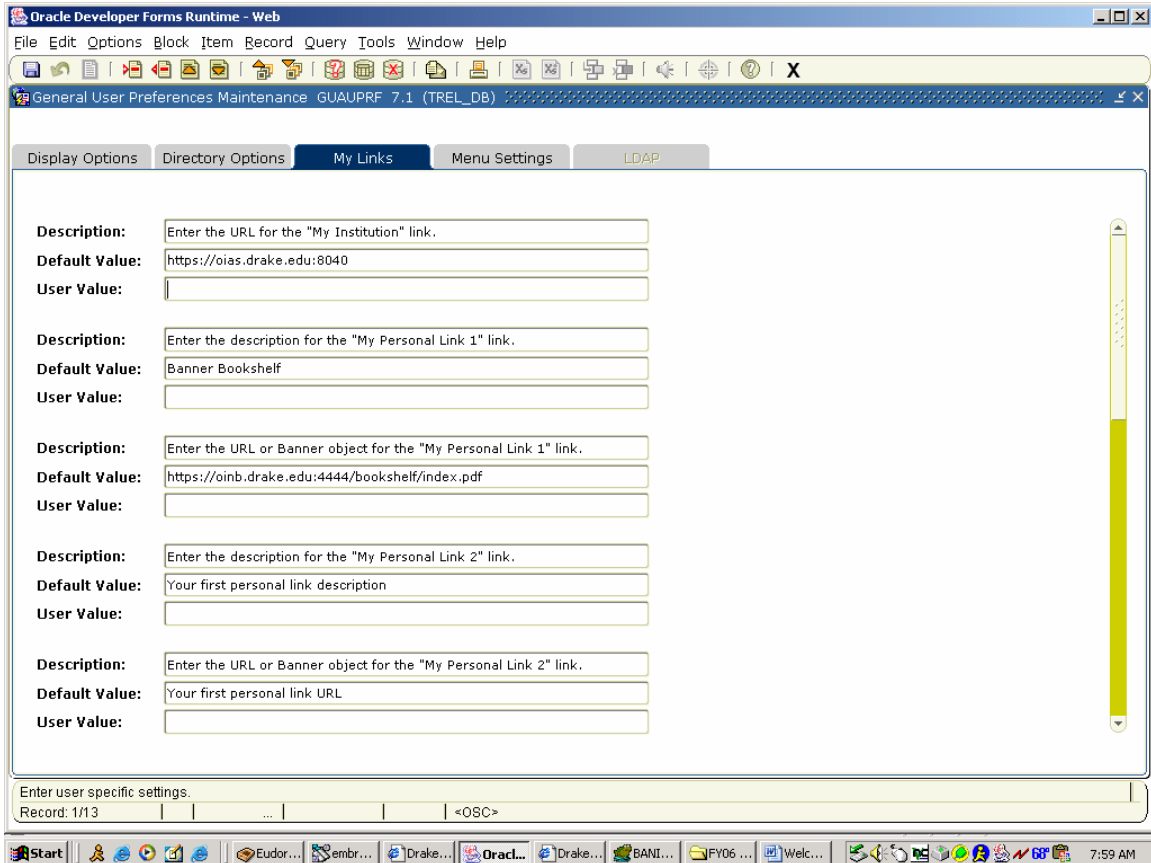
Description: Enter the RGB color code for the menu links canvas.
Default Value: r255g255b255
User Value: [Dropdown]

Description: Enter the RGB color code for the menu broadcast message canvas.
Default Value: r255g255b255
User Value: [Dropdown]

Check to have form name display on window title.
Record: 1/1 | ... | <OSC>

Start | [Icons] | 10:20 AM

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.

Oracle Developer Forms Runtime - Web: Open > SPAIDEN

File Edit Options Block Item Record Query Tools Window Help

General Person Identification SPAIDEN 7.2 (SEVEN) powered by SUNGARD SCT HIGHER EDUCATIO

Go To... My Institution: <http://www.truman.edu.com/> Generate ID: [button]

ID: 000010116 Hoffman, Nancy J.

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

ID: 000010116 Name Type: [dropdown]

Person

Last Name: Hoffman
First Name: Nancy
Middle Name: J.
Prefix: Ms.
Suffix:
Preferred First Name:
Full Legal Name:

ID and Name Source

Last Update

User: CONVERSION
Activity Date: 27-JUN-2002
Origin: CONV

Original Creation

User:
Create Date:

Non-Person

Name:

Enter the object name; Press LIST for listing.
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.

The screenshot displays the Oracle Developer Forms Runtime - Web interface for Job Submission Controls. The window title is "Oracle Developer Forms Runtime - Web" and the browser address bar shows "Process Submission Controls: GIAPCTL 7.1 (TREL_DB)".

Process: GJRRPTS (dropdown menu) | list of reports and parameters (text field) | **Parameter Set:** (dropdown menu)

Printer Control

Printer: DATABASE (dropdown menu) | **Special Print:** (text field) | **Lines:** (checkbox) | **Submit Time:** (text field)

Parameter Values

Number	Parameters	Values
01	Jobs to be Selected	G%
02	Print User Level Defaults	Y

Submission

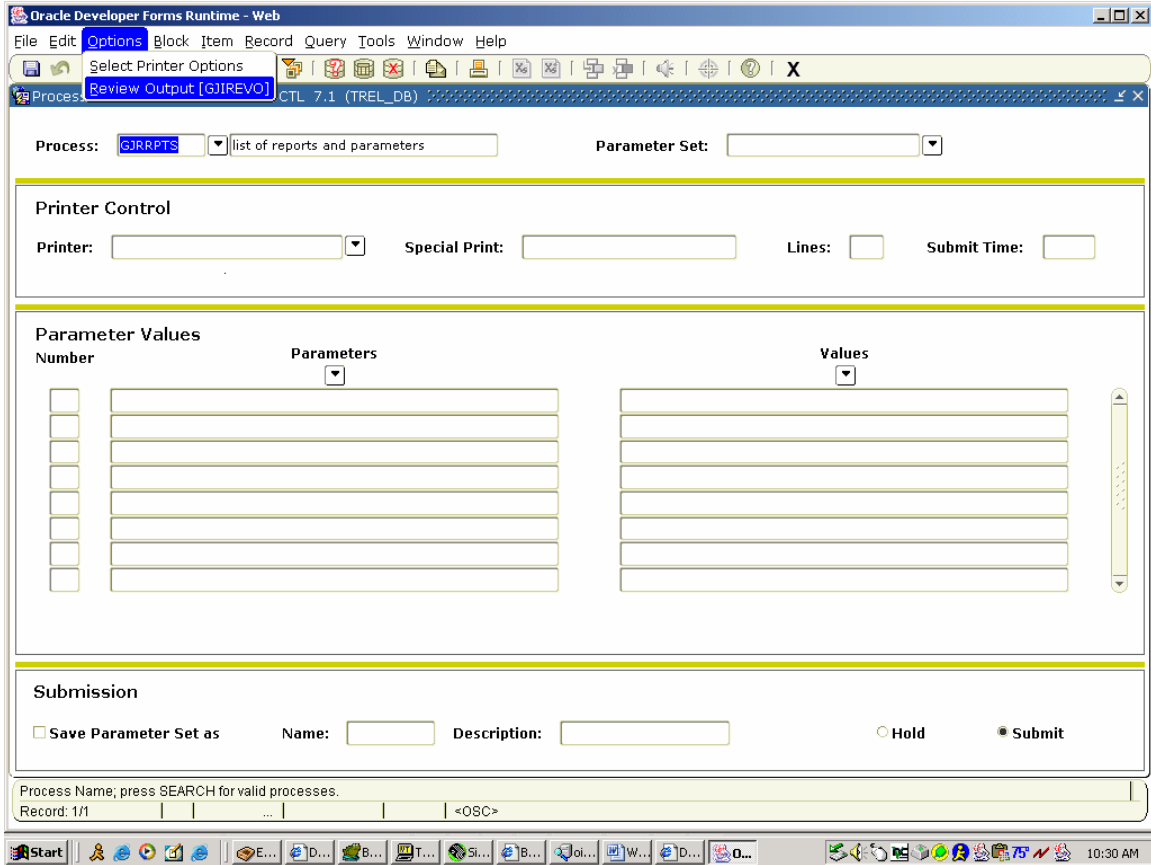
Save Parameter Set as | **Name:** (text field) | **Description:** (text field) | Hold | **Submit**

Submit process immediately or Hold for future submission. Press SAVE when complete.

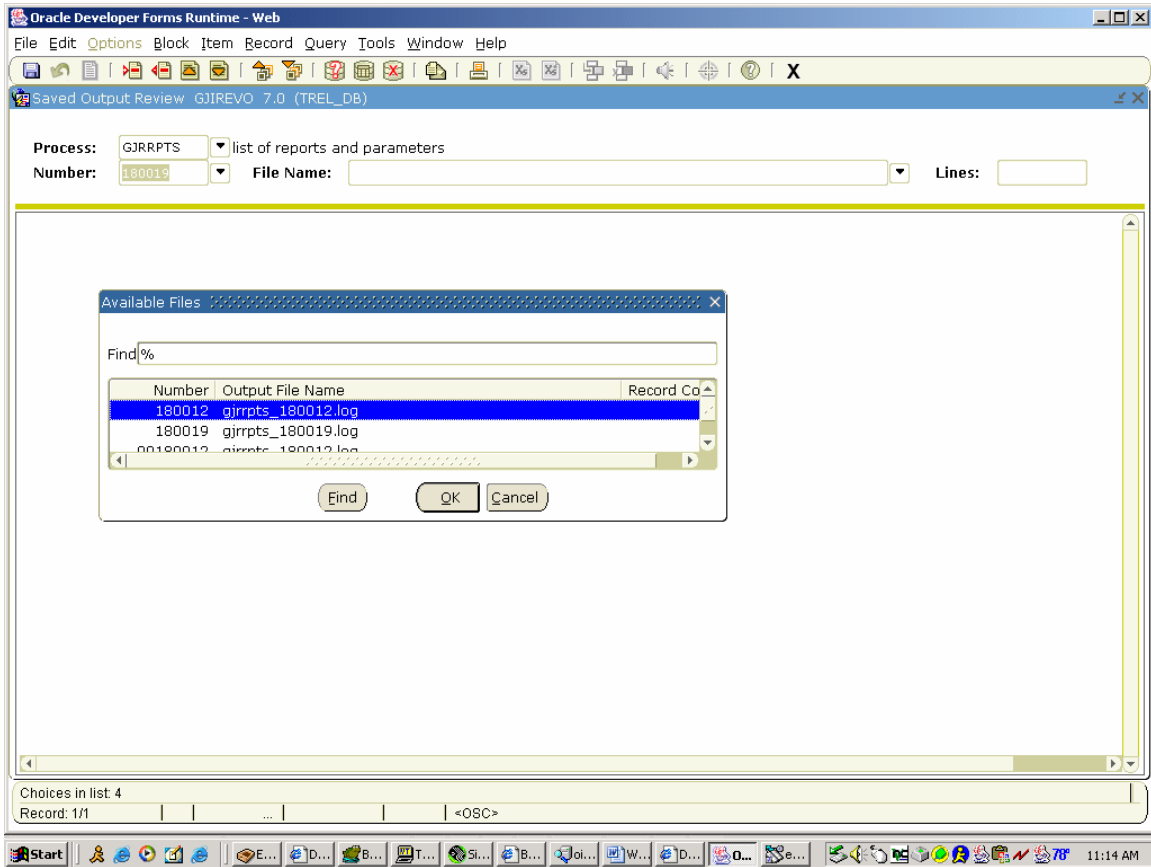
Record: 1/1 | ... | <OSC>

The Windows taskbar at the bottom shows the Start button, several application icons, and the system tray with the time 10:28 AM.

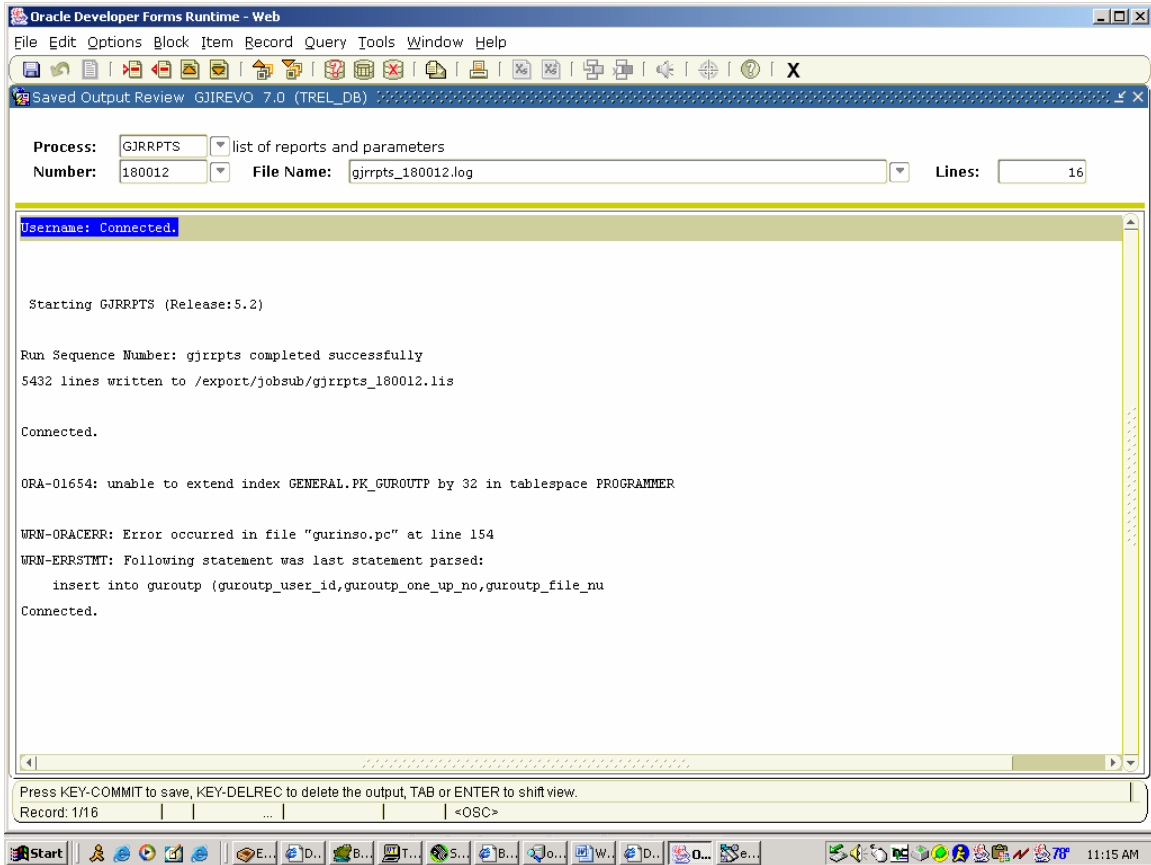
After the job has completed execution, select Review Output [GJIREVO] from the option menu.



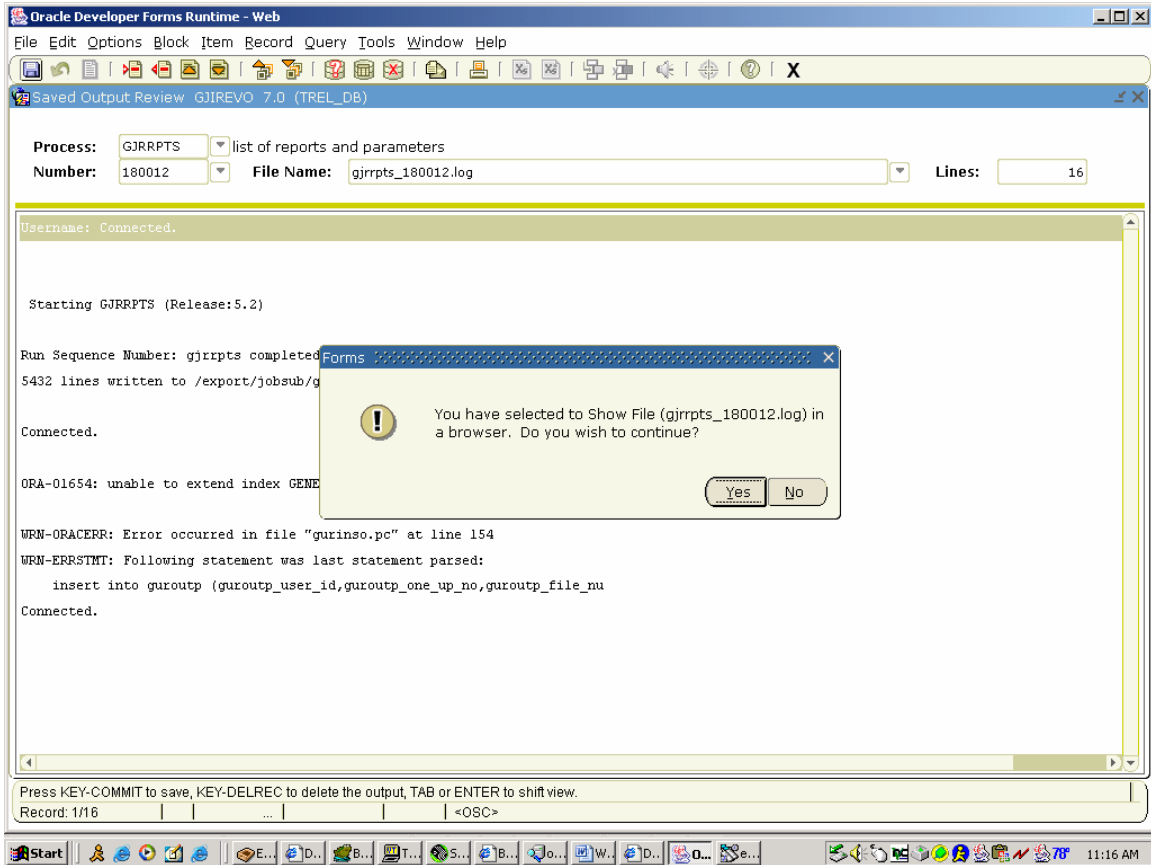
Select the file you wish to save from the list of file by clicking on the down arrow next to Number.



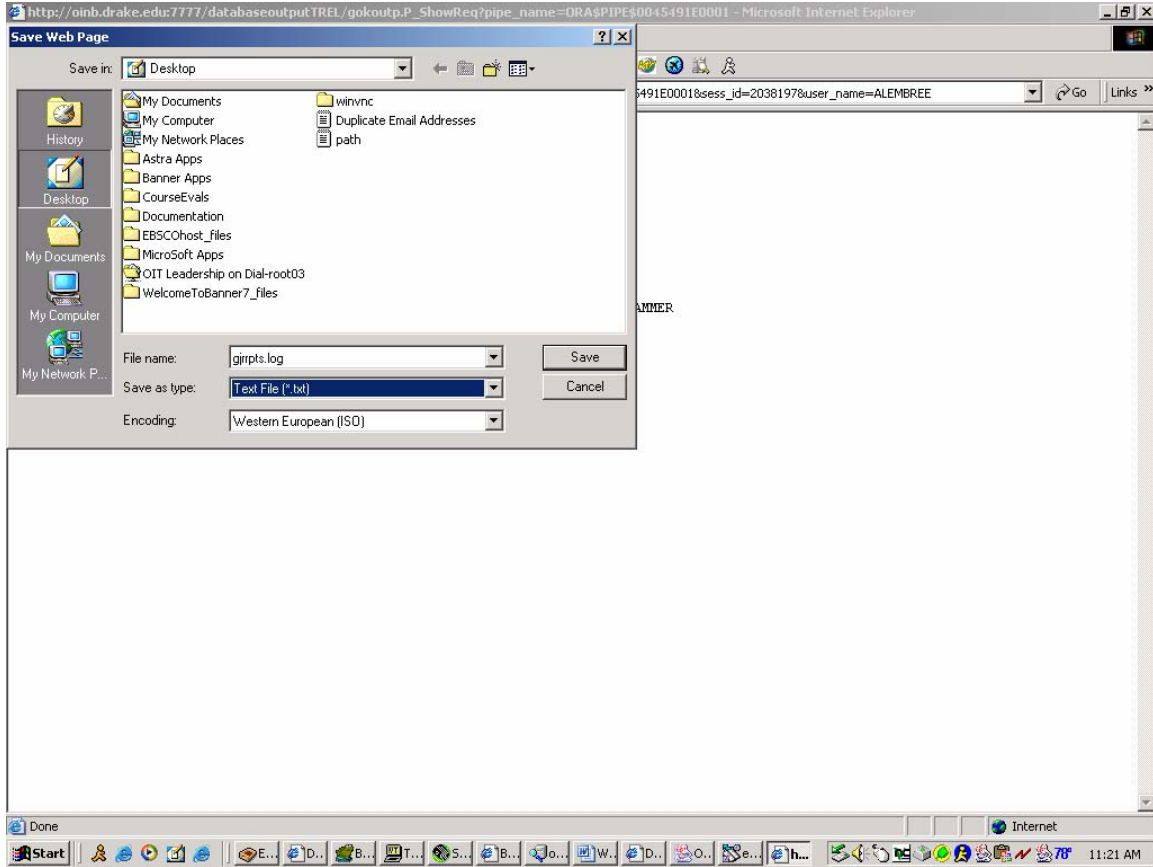
Click the Save icon on the tool bar.



Click Yes.

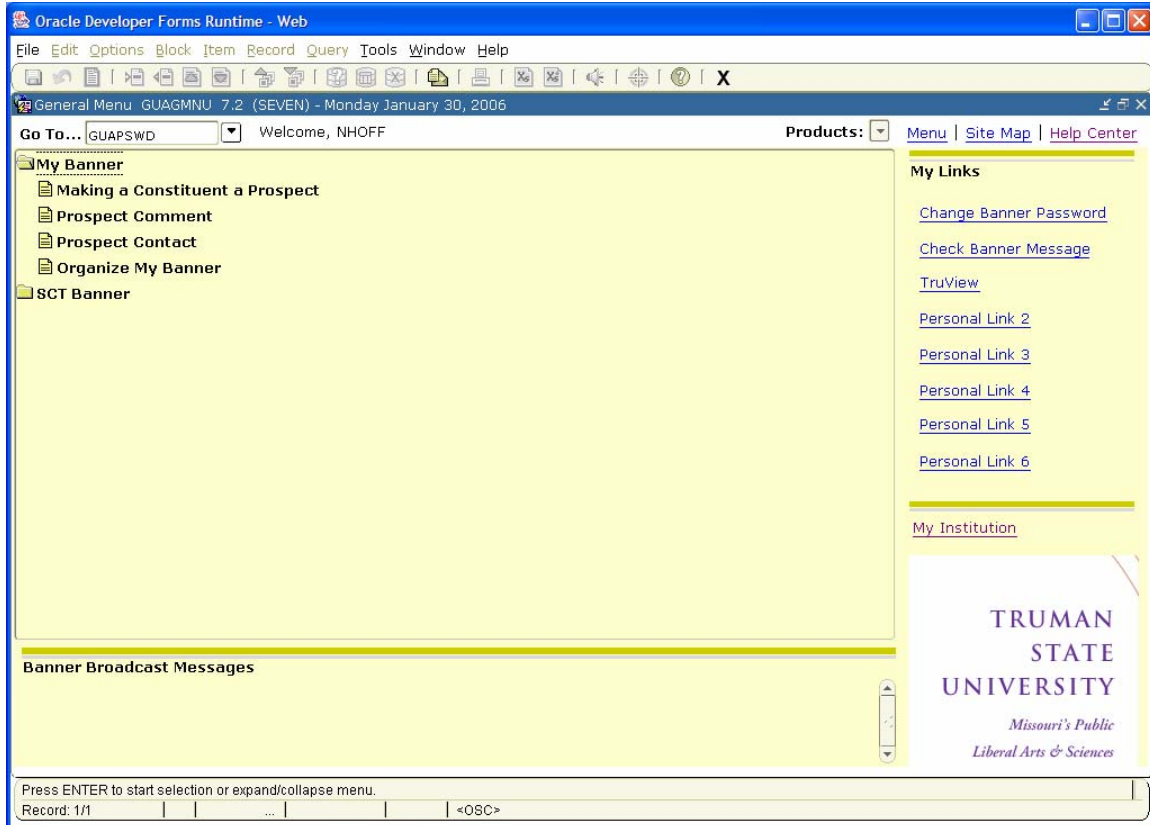


A new browser window will open with the data. To save the data to your Workstation click File on the browser menu and then select Save As. Specify the filename and the location on your workstation where you want the file saved. You will also need to specify that you want the file saved as TEXT.



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



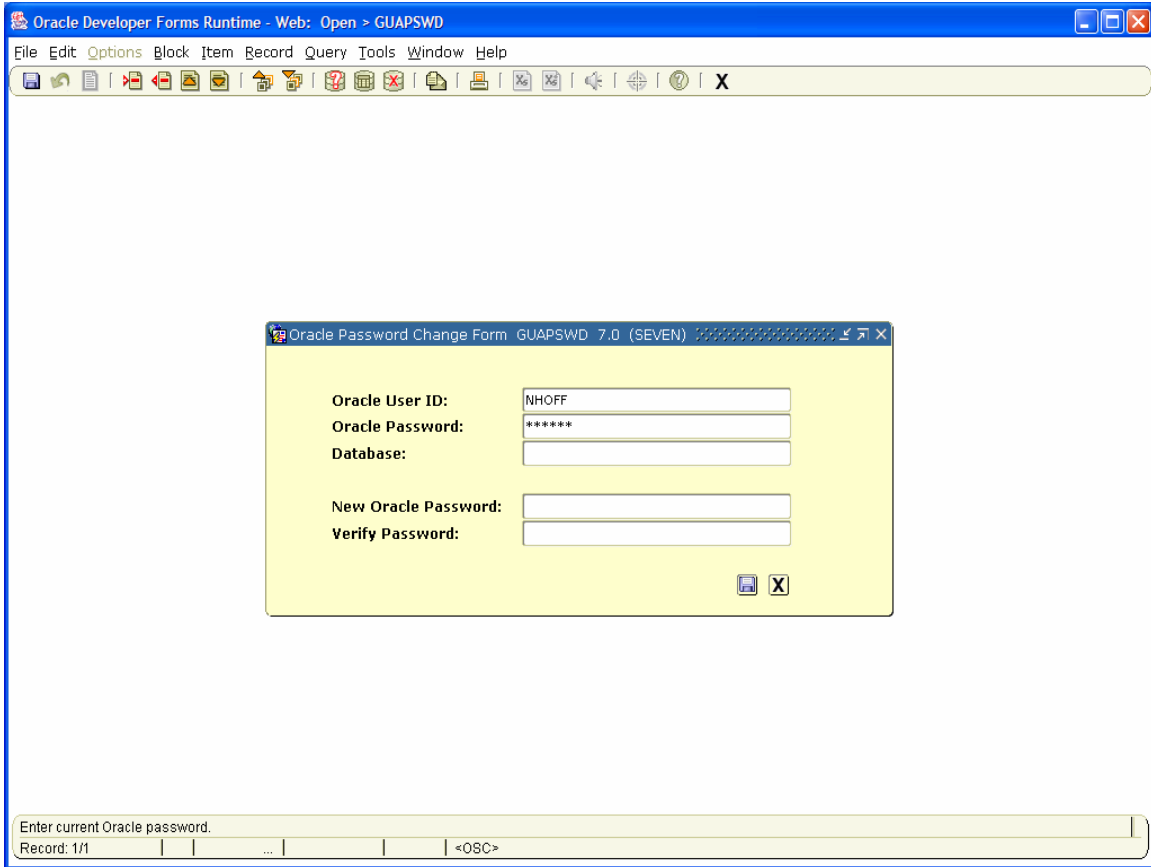
4. You will see the following screen appear.

The screenshot displays the Oracle Developer Forms Runtime interface. The main window title is "Oracle Developer Forms Runtime - Web: Open > GUAPSWD". The menu bar includes "File", "Edit", "Options", "Block", "Item", "Record", "Query", "Tools", "Window", and "Help". The toolbar contains various icons for file operations and navigation. In the center, a smaller window titled "Oracle Password Change Form GUAPSWD 7.0 (SEVEN)" is open. This form has a yellow background and contains the following fields:

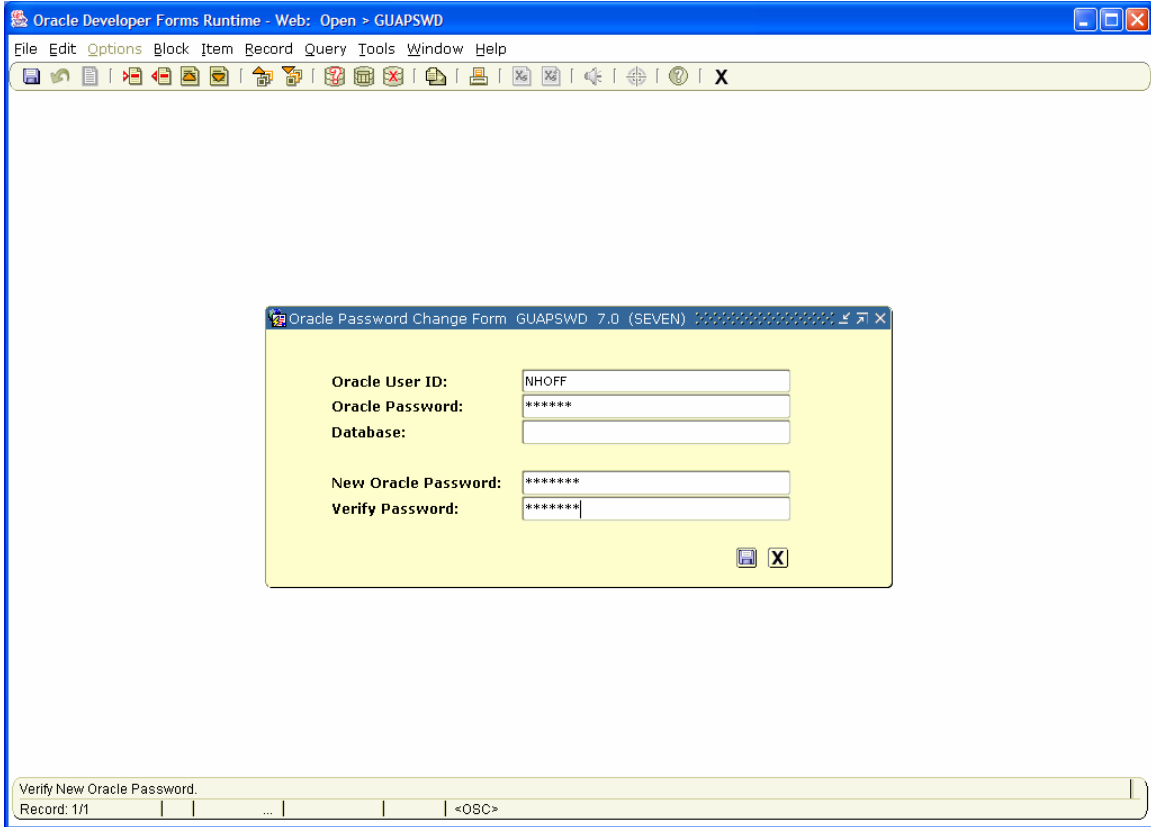
- Oracle User ID:** A text box containing "NHOFF".
- Oracle Password:** A text box.
- Database:** A text box.
- New Oracle Password:** A text box.
- Verify Password:** A text box.

At the bottom of the main window, there is a status bar with the text "Enter current Oracle password." and "Record: 1/1".

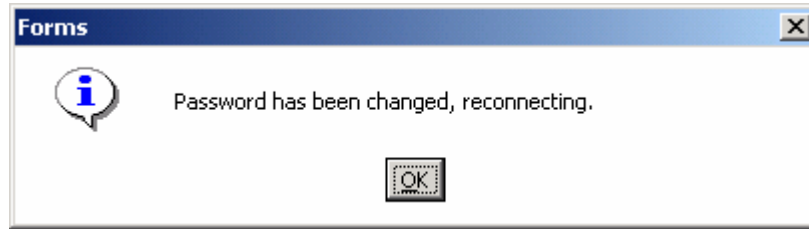
4. Enter your **current** password in the Oracle Password box.



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 DUSIS 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.

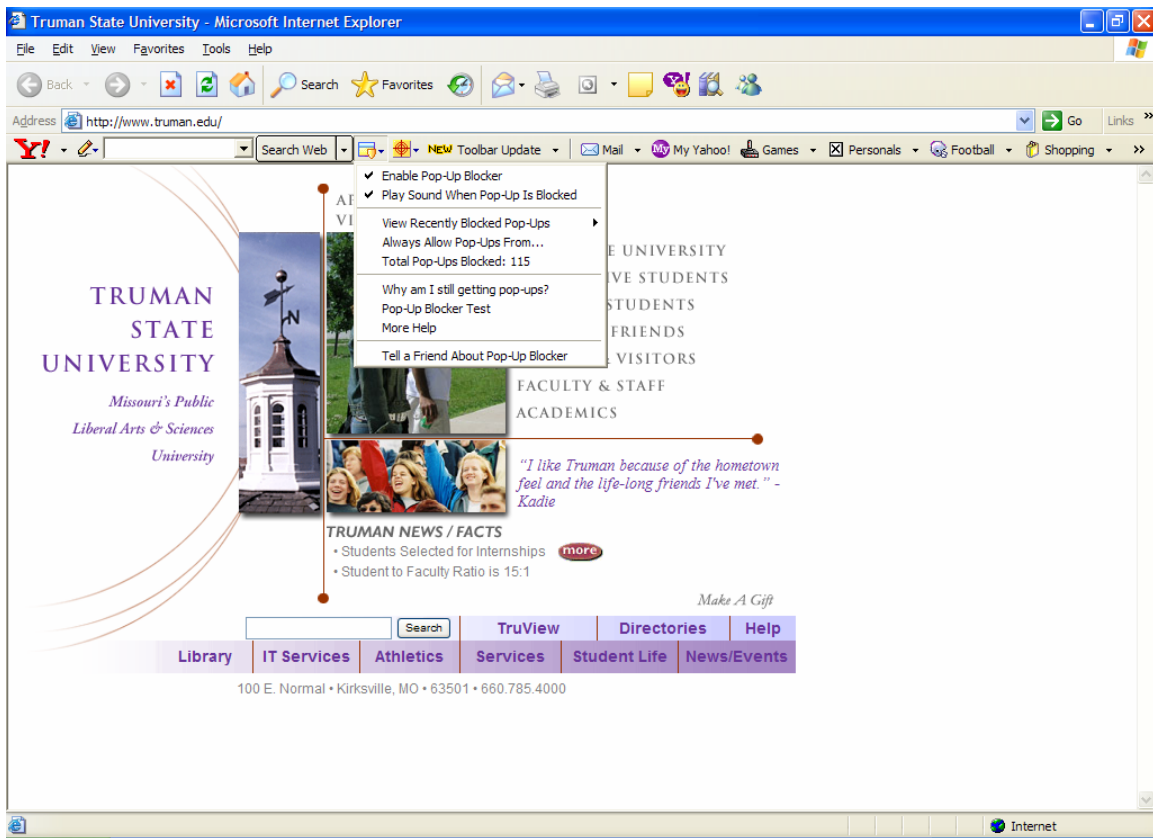
If your browser is anything else, or if either of the above sets of instructions didn't work...

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.

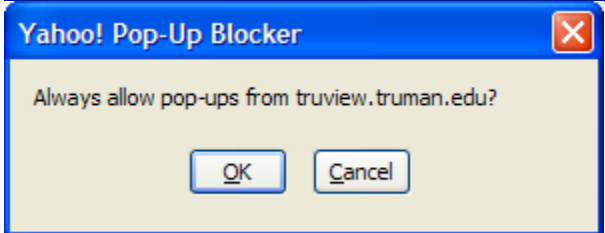
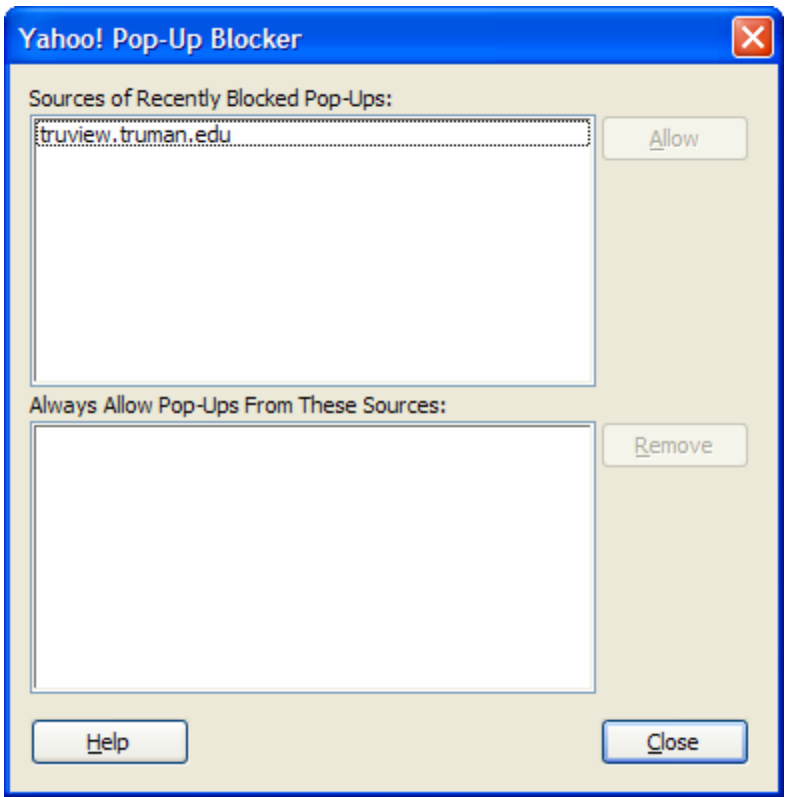
Instructions for disabling a sampling of 3rd party popup blockers are provided below.

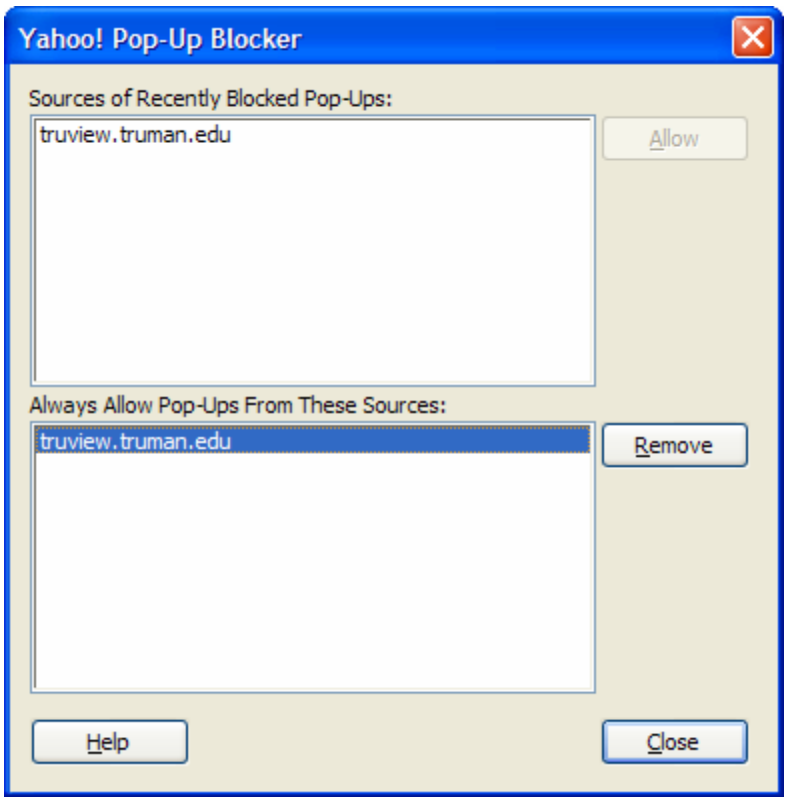
Yahoo Pop-up Blocker

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:



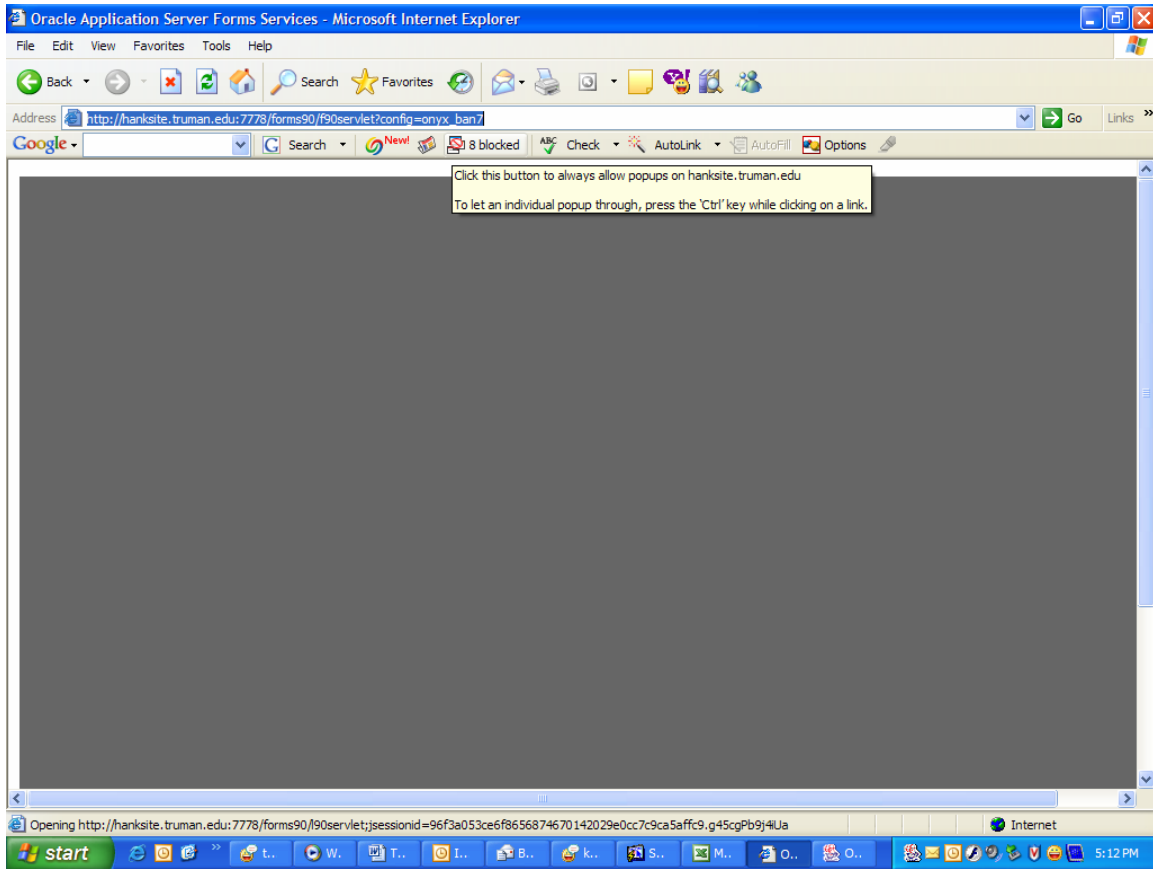
Click on “Always Allow Pop-Ups From” to see the Sources of Recently Blocked Pop-Ups. Click on the name of the source you wish to enable, and then click on the “Allow” button, followed by the “OK” button.

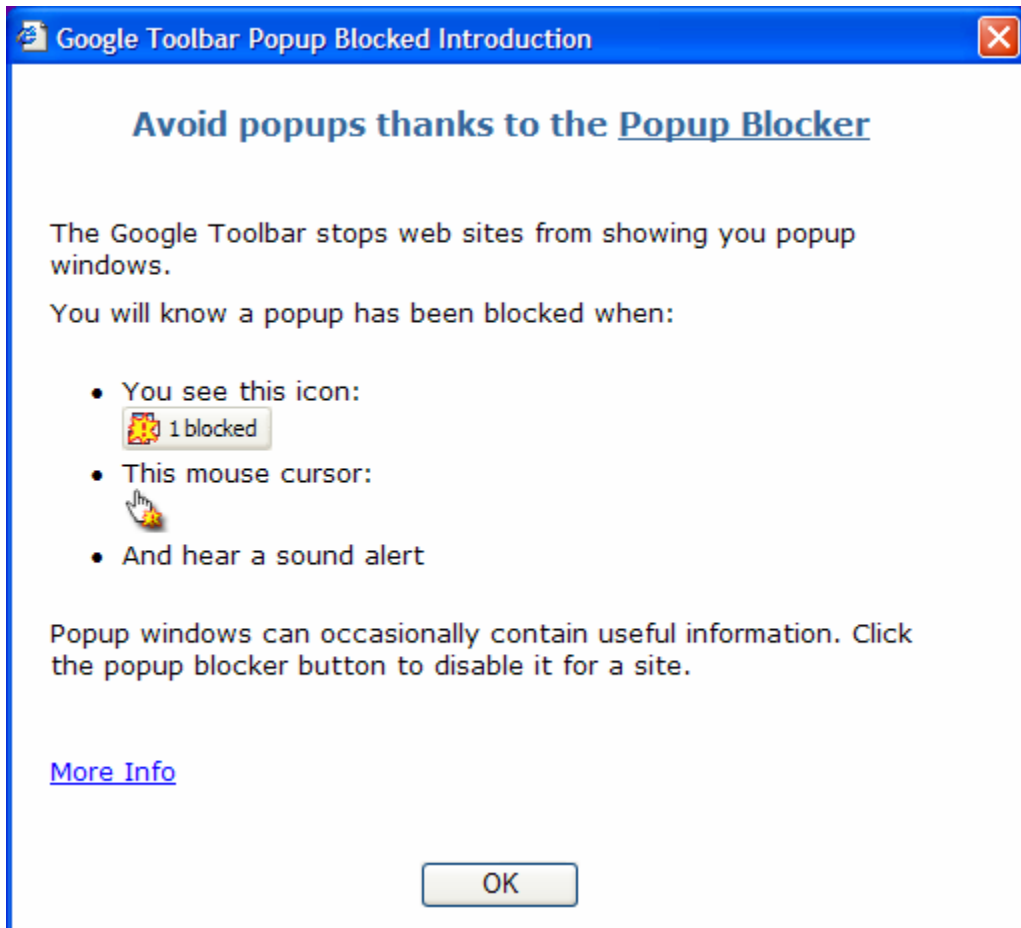




Google Pop-up Blocker

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.