



**SUNGARD** HIGHER EDUCATION

**Project OZ**  
**Banner Navigation Manual**

*Fall 2006*





## Table of Contents

<b>Section A: Introduction</b>	<b>4</b>
Overview	4
<b>Section B: Toolbar</b>	<b>5</b>
Toolbar Overview	5
Default Icons	6
<b>Section C: Help Features</b>	<b>8</b>
Auto Hints/Status Line	8
<b>Section D: Banner Forms</b>	<b>9</b>
Forms Components	9



## Section A: Introduction

### Lesson: Overview

◀ Jump to TOC

#### **Workbook goal**

The goal of this workbook is to provide you with the knowledge and practice to accurately navigate through Banner. This workbook is divided into five sections:

- Sungard Banner Forms
- Main Menu
- Menu Bar
- Toolbar
- Help features

#### **Intended audience**

All Sungard Banner users throughout the Coast Community College District

#### **Prerequisites**

Familiarity with using a computer and mouse  
Microsoft Windows or Apple Macintosh Navigation.



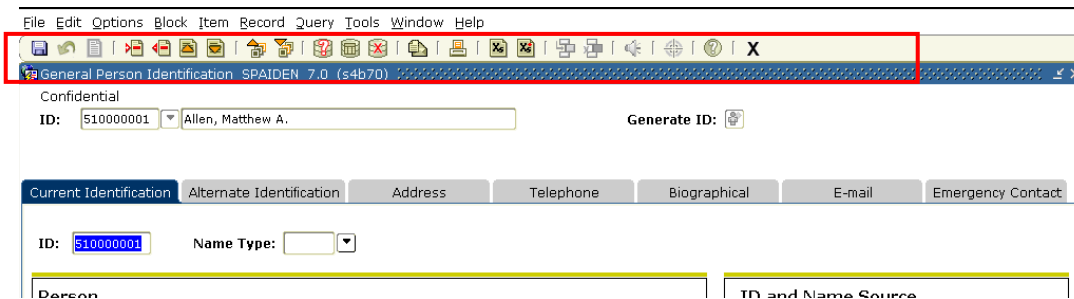
## Section B: Toolbar

### Lesson: Toolbar Overview

◀ Jump to TOC

## Introduction

A toolbar is a set of icons that represent shortcuts for performing common functions.



## Bubble Help

If you move your cursor over an icon, a box appears that describes the function of the icon; this is Bubble Help. It may be turned off at any time.

Example: If you place your cursor over the exit icon, you will see the following:



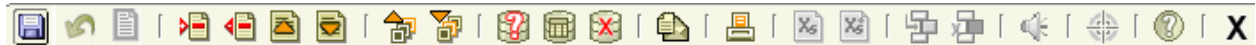


## Section B: Toolbar









### Lesson: Default Icons

◀ Jump to TOC

## Toolbar



## Commonly used icons







Icons	Function
	Save
	Rollback
	Select
	Insert Record
	Remove Record
	Previous Record
	Next Record
	Previous Block
	Next Block
	Enter Query
	Execute Query
	Cancel Query
	View/Send Message
	Print
	SCT Banner Xtender Solutions



## Section B: Toolbar

### Lesson: Default Icons (Continued)

◀ Jump to TOC

	BXS – Add Document
	Workflow Submit
	Workflow Release
	Broadcast Message
	No fine grained access control security enable
	Online help
<b>X</b>	Exit



## Section C: Help Features

### Lesson: Auto Hints/Status Line

◀ Jump to TOC

## Introduction

The Auto Hint/Status Line appears at the bottom of the screen. It describes the place where the cursor is located. Error messages, processing messages, and keyboard equivalents appear here.

The screenshot shows a web application interface with a menu of options on the left and a status line at the bottom. The menu items include:

- Applicant Administration [HRSAPPLCNT]
- Electronic Approvals [HRSELECAPPR]
- Biographic/Demographic Information [HRSPERSON]
  - Identification [PPAIDEN]
  - Employee Search Form (Employee, Applicant, COBRA) [POIDEN]
  - One-Time Payment [PEA1PAY]
  - One-Time Payment Inquiry [PEI1PAY]
  - Address List Inquiry [PPIADDR]
  - Comment [PPACMNT]
  - Person Experience [PPAEXPR]
  - General Information [PPAGENL]
  - Certification Information [PPACERT]
  - Person Skills [PPASKIL]
  - Telephone [PPATELE]
  - HR International Information [PPAINTL]
  - Person Skills Inventory [PPISINV]
  - Mail [PUAMAIL]
  - E-mail Address [GOAEMAL]
  - General Medical Information [GOAMEDI]

The status line at the bottom of the screen displays the text: "Press ENTER to start selection or expand/collapse menu." A red arrow points from the text "Status Line" to this status line.



## Section D: Banner Forms

### Lesson: Forms Components

◀ [Jump to TOC](#)

#### **Introduction**

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.

Blocks:

1. Group information
2. Can be one or more on a screen
3. May be organized on tabs within a form
4. Think of them as “sections” on a form



## Section D: Banner Forms

### Lesson: Forms Components (Continued)

◀ Jump to TOC

#### Types of blocks

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

The screenshot displays the Banner Requisition Entry form with the following components:

- Key Block:** A red-bordered box containing fields for Requisition (NEXT), Order Date (02-MAY-2006), Delivery Date, Commodity Total (.00), Transaction Date (02-MAY-2006), Comments, Accounting Total (.00), and checkboxes for In Suspense, Document Text, and Document Level Accounting (checked).
- Information Block:** A red-bordered box containing fields for Requestor, Organization, Phone, Extension, Ship To, Street Line 1, 2, 3, Building, Floor, City, State or Province, Zip or Postal Code, Nation, Telephone, Extension, Contact, and Attention To.

The form also includes a menu bar (File, Edit, Options, Block, Item, Record, Query, Tools, Help), a toolbar, and a status bar at the bottom with the text "Enter request order date(DD-MON-YYYY)" and "Record: 1/1".



## Section D: Banner Forms

### Lesson: Forms Components (Continued)

◀ Jump to TOC

Part of Form	Description
Key block	<p>Where you start on a form.</p> <p>Every form has a Key block.</p> <p>A unique code is entered such as an ID number, term code or document number.</p> <p>Lets Banner know what piece of information you want to retrieve.</p> <p>The rest of the information on the form will refer to the information that you enter on the Key block.</p>
Information block	<p>Section that contains related information to what was entered in the Key block.</p> <p>A line may separate each Information block on the form.</p>

### Navigating blocks

To navigate in between blocks or tabs, you would use the Next Block or Previous Block functions. These are icons located on the toolbar in a form. If you prefer to use keystrokes for navigation, you can use Ctrl-Page Down to reach the Next Block or Ctrl-Page Up for the Previous Block.

Next Block



Previous  
Block





## Section D: Banner Forms

### Lesson: Forms Components (Continued)

◀ Jump to TOC

#### Fields

Fields are labeled space within a block. You can enter, query, change and/or display specific information within a field.

There is usually more than one field on a form:

**Requestor:**

**Organization:**  ▼

**Phone:**

**Extension:**

**Fields**



## Section D: Banner Forms

### Lesson: Forms Components (Continued)

◀ Jump to TOC

#### Field states

The following list details the different states a field can be presented on a form.

Note: You may not be able to navigate to all fields within a form. On query-only forms, you frequently cannot move through any fields at all.

State	Example	Description
Enabled	<b>Age:</b> <input type="text" value="65"/>	Cursor is allowed in the field. Information in the field is displayed in black text.
Disabled	<b>ID:</b> <input type="text" value="510000001"/> <input type="text" value="Allen, Matthew A."/>	Cursor is not allowed in the field. If information exists, it cannot be changed



## Section D: Sungard Banner Forms

### Lesson: Forms Components (Continued)

◀ Jump to TOC

#### Field values

Any data that is entered or displayed in a field is a value. There are two types of values as detailed in the chart below.

Note: The names of the fields that have a pre-defined value, or LOV, have a drop down arrow next to the field. Fields that you can search for a value in the database also have a drop-down arrow next to the field. The most common example is the ID field on the Iden forms.


<b>Citizenship:</b>	<input type="text" value="Y"/>	▼	Citizen
<b>Ethnicity:</b>	<input type="text" value="1"/>	▼	Caucasian
<b>Marital Status:</b>	<input type="text" value="M"/>	▼	Married



## Section D: Banner Forms

### Lesson: Forms Components (Continued)

◀ Jump to TOC

Type	Description	Example
Free-format	Free access to type in whatever information is required. Not previously defined on a validation form.	Street addresses
List of Values (LOV)	Data on the LOV comes from previously defined values on a validation form. When you double-click on a LOV field. Use a Search icon or press the F9 key, previously defined values are displayed.	State codes – CA, FL, PA
Search Field	If a field is a search field you must click the search icon (  ) to search.	ID, Last Name, First Name



## Section D: Banner Forms

### Lesson: Forms Components (Continued)

◀ Jump to TOC

#### Navigating fields

To navigate between fields, use the next and previous keystrokes as detailed below.

Note: You may also navigate between fields using the item pull-down menu on the menu bar.

Function	Command
Next field	Tab or Enter
Previous field	Shift + Tab

Auto-Advanced – standard sized fields, e.g., dates, budget number, etc.

#### Viewing records

Some forms have a scroll bar to view existing records.

Employee Search Form (Employee, Applicant, COBRA) POIIDEN 7.0 (s4b70)

ID	Last Name	First Name	Middle Name	Change Indicator	Type	Birth Date
WTE000014	& Adams	Beth		N		09-NOV-1985
WTE000012	&Adams	Nicholas		N		09-NOV-1980
156000007	&Carrington	Julia	M	N		01-JAN-1975
WTE000014	< Adams	Beth		N		09-NOV-1985
TESTAPIHR	API	HR				01-JAN-1970
TESTAPIH1	API	Mar*				08-SEP-1976
012420050	Abercrombie	Sean			FRME	15-MAR-1963
WTE000006	Adams	April				09-NOV-1980
WTE000014	Adams	Deth		N		09-NOV-1985
WTE000014	Adams	Beth				09-NOV-1985
HRCLIENT1	Adams	Cindy			LEGL	09-NOV-1982
WTE000017	Adams	Daniel				09-NOV-1980
WTE000016	Adams	Deb				09-NOV-1980
DRC000004	Adams	Dee				09-NOV-1983



## Section D: Banner Forms

### Lesson: Forms Components (Continued)

◀ Jump to TOC

#### Navigating records

You can navigate to different records one of three ways:

1. Use the Next Record or Previous Record functions located on the toolbar in a form.

Next Record



Previous Record



2. Use the record pull-down menu in the menu bar.
3. Use the keys on the keyboard to navigate through records.

Function	Command
Next record	Down-arrow
Previous record	Up-arrow



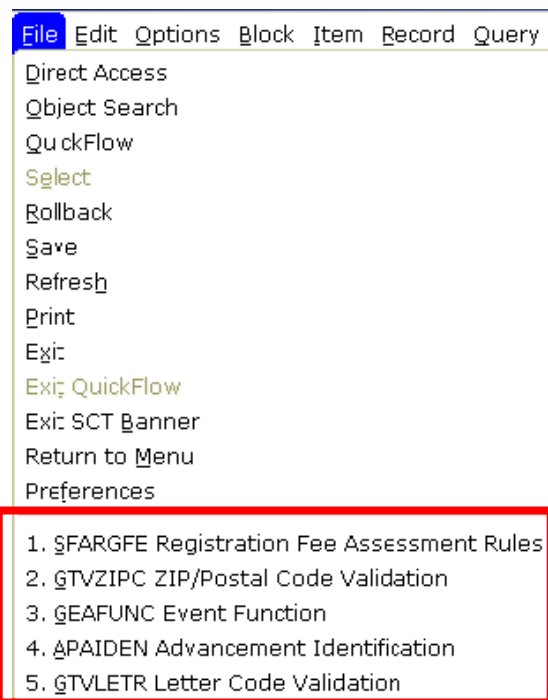
## Section D: Banner Forms

### Lesson: Forms Components (Continued)

◀ Jump to TOC

#### List of forms stored in the File menu

Forms can be accessed from the list of forms that are stored in the File Menu. Banner retains a list in the File menu of the forms you have accessed during your current Banner session. You may quickly access these forms by clicking on the File menu and choosing the form from the list. The list is refreshed each time you log out and log back in to Banner.



← Forms list



## Section D: Banner Forms

### Lesson: Forms Components (Continued)

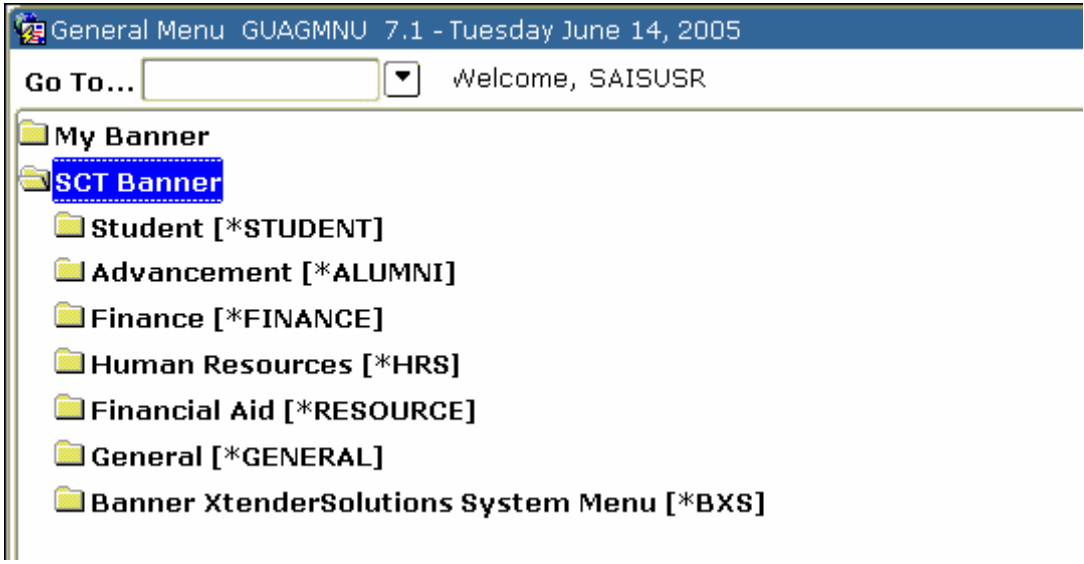
◀ Jump to TOC

#### Main menu 'Go To...' field

You can access a form from the Go To... field above the Main Menu, if you know the seven character code of the form you wish to access. You may also use the up and down arrow keys in the Go To... field to access forms you have previously opened during your current Banner session.

#### Procedure

Follow these steps to access a form from the Main Menu.

Step	Action
1	<p>Enter the form's seven-character code in the <b>Go To...</b> field.</p> 
2	Press <b>Enter</b> or <b>Tab</b> or <b>double click</b> the folder



## Section D: Banner Forms

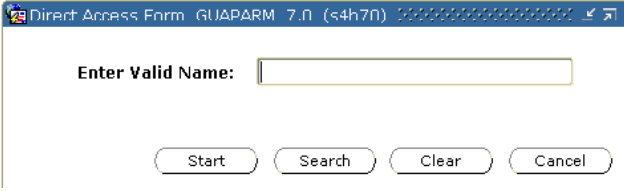
### Lesson: Forms Components (Continued)

◀ Jump to TOC

#### Direct access

Use the Direct Access Form (GUAPARM) for quick access if you know a form's seven character code.

#### Procedure

Step	Action
1	While in a form, from the menu bar, select File.
2	Select the Direct Access option. That will take you to GUAPARM.  <b>Note:</b> Always open Direct Access from the <b>File</b> menu on the menu bar. You will learn more about the seven-character code later on in the module.
3	Enter a valid name of a form.
4	Click the <b>Start</b> button.

# Sunguard Banner Forms - Naming Conventions General (G)

Position 1 Code ~ Product/Purpose	Position 2 Code ~ Product/Purpose	Position 3 Code ~ Product/Purpose	Position 4 Code ~ Product/Purpose (Examples Only)
G ~ General	E ~ Event Management J ~ Job Submission L ~ Letter Generation O ~ Overall P ~ Purge	A ~ Application B ~ Base Table I ~ Inquiry M ~ Maintenance P ~ Process	***IDEN ~ Identification ***PINC ~ Position Incumbent ***STDN ~ Student Relation ***PERS ~ Person
	S ~ Security	R ~ Rule Table, Repeating Table, Report, or Process	
	T ~ Validation Form/Table	V ~ Validation	
	U ~ Utility		
	X ~ Cross Product		

*Every form has an abbreviated seven-character form name.*

*Position 1 identifies the SCT Banner product owning the form, report, process, or table.*

*Position 2 identifies the application module owning the form, report, process, or table.*

*Position 3 identifies the type of form, report, process or table.*

*Positions 4, 5, 6, & 7 identifies a unique four-character code for the form, report, process, or table.*

# Sunguard Banner Forms - Naming Conventions

## Finance (F)

Position 1 Code ~ Product/Purpose	Position 2 Code ~ Product/Purpose	Position 3 Code ~ Product/Purpose	Position 4 Code ~ Product/Purpose (Examples Only)
F ~ Finance	A ~ Accounts Payable	A ~ Application	***IDEN ~ Identification
	B ~ Budget Development	B ~ Base Table	***PINC ~ Position Incumbent
	C ~ Cost Accounting	I ~ Inquiry	***STDN ~ Student Relation
	E ~ Electronic Data Interchange	M ~ Maintenance	***PERS ~ Person
	F ~ Fixed Assets	P ~ Process	
	G ~ General Ledger	R ~ Rule Table, Repeating Table, Report, or Process	
	I ~ Investment Management	V ~ Validation	
	N ~ Endowment Management		
	O ~ Operations		
	P ~ Purchasing/Procurement		
	R ~ Research Accounting		
	S ~ Stores Inventory		
	T ~ Validation Form/Table		
	U ~ Utility		
	X ~ Archive/Purge		

*Every form has an abbreviated seven-character form name.*

*Position 1 identifies the SCT Banner product owning the form, report, process, or table.*

*Position 2 identifies the application module owning the form, report, process, or table.*

*Position 3 identifies the type of form, report, process or table.*

*Positions 4, 5, 6, & 7 identifies a unique four-character code for the form, report, process, or table.*

# Sunguard Banner Forms - Naming Conventions

## Financial Aid (R)

Position 1 Code ~ Product/Purpose	Position 2 Code ~ Product/Purpose	Position 3 Code ~ Product/Purpose	Position 4 Code ~ Product/Purpose (Examples Only)
R ~ Financial Aid	B ~ Budgeting C ~ Record Creation E ~ Electronic Data Exchange F ~ Funds Management H ~ History & Transcripts J ~ Student Employment L ~ Logging N ~ Need Analysis O ~ Common Functions P ~ Packaging & Disbursements R ~ Requirements Tracking S ~ Student System Shared Data T ~ Validation Form/Table U ~ Utility	A ~ Application B ~ Base Table I ~ Inquiry M ~ Maintenance P ~ Process R ~ Rule Table, Repeating Table, Report, or Process V ~ Validation	***IDEN ~ Identification ***PINC ~ Position Incumbent ***STDN ~ Student Relation ***PERS ~ Person

Every form has an abbreviated seven-character form name.

Position 1 identifies the SCT Banner product owning the form, report, process, or table.

Position 2 identifies the application module owning the form, report, process, or table.

Position 3 identifies the type of form, report, process or table.

Positions 4, 5, 6, & 7 identifies a unique four-character code for the form, report, process, or table.

# Sunguard Banner Forms - Naming Conventions

## HR - Payroll (P) & Position Control (N)

Position 1 Code ~ Product/Purpose	Position 2 Code ~ Product/Purpose	Position 3 Code ~ Product/Purpose	Position 4 Code ~ Product/Purpose (Examples Only)
N ~ Position Control	A ~ Application	A ~ Application	***IDEN ~ Identification
P ~ Payroll	B ~ Budget	B ~ Base Table	***PINC ~ Position Incumbent
	C ~ COBRA	I ~ Inquiry	***STDN ~ Student Relation
	D ~ Benefit/Deductions	M ~ Maintenance	***PERS ~ Person
	E ~ Employee	P ~ Process	
	H ~ Time Reporting/History	R ~ Rule Table, Repeating Table, Report, or Process	
	O ~ Overall	V ~ Validation	
	P ~ General Person		
	R ~ Electronic Approvals		
	S ~ Security		
	T ~ Validation/Rule Table		
	U ~ Utility		
	X ~ Tax Administration		

Every form has an abbreviated seven-character form name.

Position 1 identifies the SCT Banner product owning the form, report, process, or table.

Position 2 identifies the application module owning the form, report, process, or table.

Position 3 identifies the type of form, report, process or table.

Positions 4, 5, 6, & 7 identifies a unique four-character code for the form, report, process, or table.

# Sunguard Banner Forms - Naming Conventions Student (S) - Shared

Position 1 Code ~ Product/Purpose	Position 2 Code ~ Product/Purpose	Position 3 Code ~ Product/Purpose	Position 4 Code ~ Product/Purpose (Examples Only)
S ~ Student (shared)	A ~ Admissions	A ~ Application	***IDEN ~ Identification
	C ~ Catalog	B ~ Base Table	***PINC ~ Position Incumbent
	E ~ Support Services	I ~ Inquiry	***STDN ~ Student Relation
	F ~ Registration/Fee Assessment	M ~ Maintenance	***PERS ~ Person
	G ~ General Student	P ~ Process	
	H ~ Grades/Academic History	R ~ Rule Table, Repeating Table, Report, or Process	
	I ~ Faculty Load	V ~ Validation	
	L ~ Location Management		
	M ~ CAPP		
	O ~ Overall		
	P ~ Person		
	R ~ Recruiting		
	S ~ Schedule		
	T ~ Validation Form/Table		
	U ~ Utility		

Every form has an abbreviated seven-character form name.

Position 1 identifies the SCT Banner product owning the form, report, process, or table.

Position 2 identifies the application module owning the form, report, process, or table.

Position 3 identifies the type of form, report, process or table.

Positions 4, 5, 6, & 7 identifies a unique four-character code for the form, report, process, or table.

