TENNESSEE
STATE UNIVERSITY

Banner
Basics/Navigation – Training Guide

Updated - August 2014

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Introduction

The purpose of this training guide is to introduce you to Internet Native Banner (INB) and the basic functionality including names searches and navigation.

Banner Product Suite (Modules)

1. General
2. Advancement
3. Finance
4. Financial Aid
5. Human Resources – Payroll/Position Control
6. Student

Banner is an integrated database made up of six products listed above. With Banner's integrated database, all information is kept in one database and is accessed through the products. This allows for consistent information and improved data integrity. For example, if a Tennessee State University employee is also a TSU graduate, they would have one record in Banner, but activity in three modules:
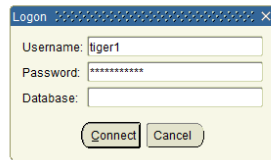
- Human Resources – Employment information
- Advancement – Alumni information and activity
- Student – Degree information

Accessing Banner

If you do not have a shortcut on your desktop, Banner is available at the Tennessee State University web page at www.tnstate.edu/banner.

1. Go to www.tnstate.edu/banner
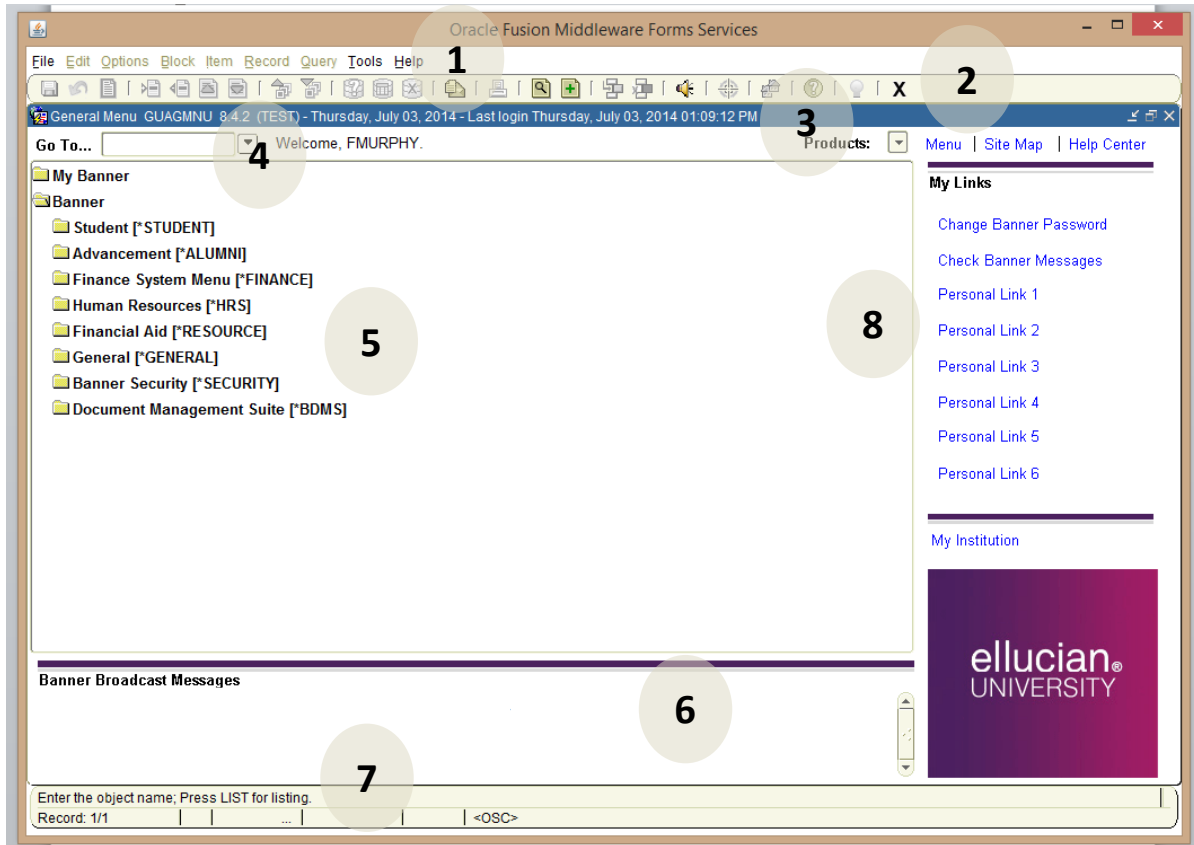2. Click the **PROD System** link
3. The Logon page will open

7. Enter your Username and Password* (database is not required)
8. Click **Connect**
9. Banner will open in a new browser

   *NOTE: The first time you sign into Banner you will be prompted to change your password

The Main Menu

The Main Menu contains links and fields that you will use to navigate through Banner.

Parts of the Main Menu

1. **Menu Bar** – Contains items that will be used to navigate and work through Banner
2. **Toolbar** – A set of icons that represent shortcuts for performing common functions in Banner
3. **Title Bar** – Displays the form descriptions, seven character code and other information
4. **Go To Field** – Enter the seven-character code to open the form – be sure to press *Enter*
5. **Hierarchical Tree Menu Structure** – Access forms through the main menu by selecting and opening folders
6. **Broadcast Messages Canvas** – Displays messages that have been sent to all users
7. **Auto Hint/Status Line** – Describes the field where the cursor is located also displays processing messages and errors
8. **My Links Canvas** – Create up to six Personal Links for quick access to Banner forms or web pages

Banner Naming Convention

Every form in Banner has an abbreviated seven-character form name. Most of the time, forms are referred to by this seven-character form name. The position of the character and the character defines the form.

Position 1 - Owner

Identifies the Banner product owning the form.

Code	Product
A	Advancement
F	Finance
G	General
N	Position Control (Human Resources)
P	Payroll (Human Resources)
R	Financial Aid
S	Student

Position 2 – Sub-Module

Identifies the application module (sub-module) owning the form. It is also unique to the product identified in Position 1.

Advancement (A)

Code	Purpose
A	Membership
D	Designation
E	Event Management
F	Campaign
G	Pledge and Gift/Pledge Payment
L	Label
M	Prospect Management
O	Organization
P	Constituent/Person
S	Solicitor Organization
T	Validation Form/Table
U	Utility
X	Expected Matching Gift

Finance (F)

Code	Purpose
A	Accounts Payable
B	Budget Development
C	Cost Accounting
E	Electronic Data Interchange
F	Fixed Assets
G	General Ledger
I	Investment Management
N	Endowment Management
O	Operations
P	Purchasing/Procurement
R	Research Accounting
S	Stores Inventory
T	Validation Form/Table
U	Utility
X	Archive/Purge

Financial Aid (R)

Code	Purpose
B	Budgeting
C	Record Creation
E	Electronic Data Exchange
F	Funds Management
H	History and Transcripts
J	Student Employment
L	Logging
N	Need Analysis
O	Common Functions
P	Packaging and Disbursements
R	Requirements Tracking
S	Student System Shared Data
T	Validation Form/Table
U	Utility

General (G)

Code	Purpose
E	Event Management
J	Job Submission
L	Letter Generation
O	Overall
P	Purge
S	Security
T	Validation Form/Table
U	Utility

HR/Payroll (P) and Position Control (N)

Code	Purpose
A	Application
B	Budget
C	COBRA
D	Benefit/Deductions
E	Employee
H	Time Reporting/History
O	Overall
P	General Person
R	Electronic Approvals
S	Security
T	Validation/Rule Table
U	Utility
X	Tax Administration

Student

Code	Purpose
A	Admissions
C	Catalog
E	Support Services
F	Registration/Fee Assessment
G	General Student
H	Grades/Academic History
I	Faculty Load
L	Location Management
O	Overall
P	Person
R	Recruiting
S	Schedule
T	Validation Form/Table
U	Utility

Position 3 – Type of Form

Identifies the type of form and the purpose of the form.

Code	Type of Form/Purpose
A	Application Form
B	Base Table
I	Inquiry
M	Maintenance
P	Process
R	Rule or repeating table (Report or Process)
V	Validation

Positions 4 – 7 – Unique Identifier

The last four characters of a form are a unique identifier. There may be multiple forms that begin with the same three characters (ex: **SPA**IDEN, **SPA**TELE) the last four character help describe the form.

Examples

Code	Purpose
APAACTY	Advancement - Activity Form
FTVACCT	Finance - Account Code Validation Form
RPAAPMT	Financial Aid – Package Maintenance Form
GUISRCH	General – Search Form
NBAJOBS	Position Control (HR) – Employee Jobs Form
PEAEMPL	Payroll (HR) – Employee Information Form
SGASTDN	Student – General Student Form

Banner Forms

Banner uses forms to enter and retrieve information from the database.

How to Access Banner Forms

From the Main Menu
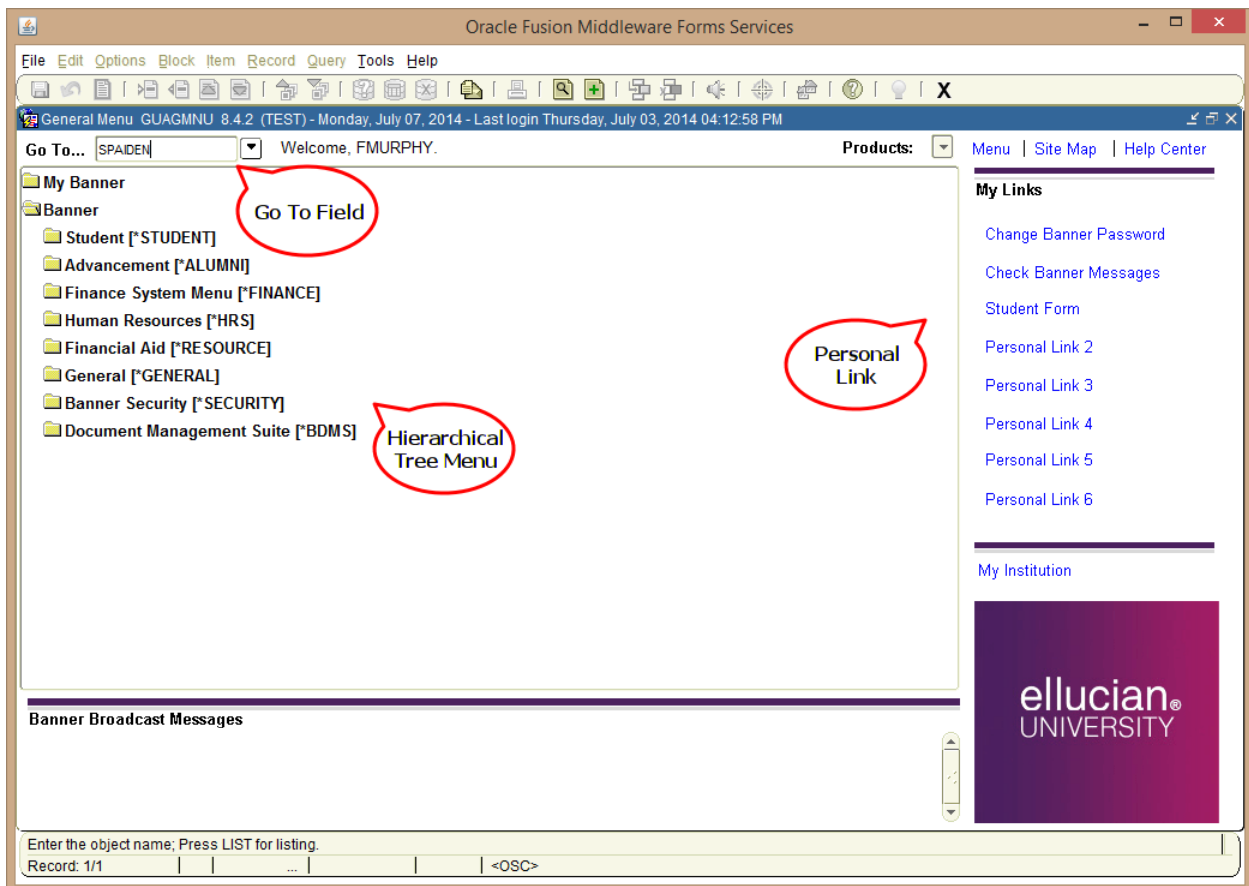
- **Go To Field** – Enter the seven-Character code and <Enter>
- **Personal Link** – Click on the link you created
- **Hierarchical Tree Menu** – Click through the product areas to expand and collapse the products and sub-modules

From a Form

Both of the features are available from the **File Menu Item**.
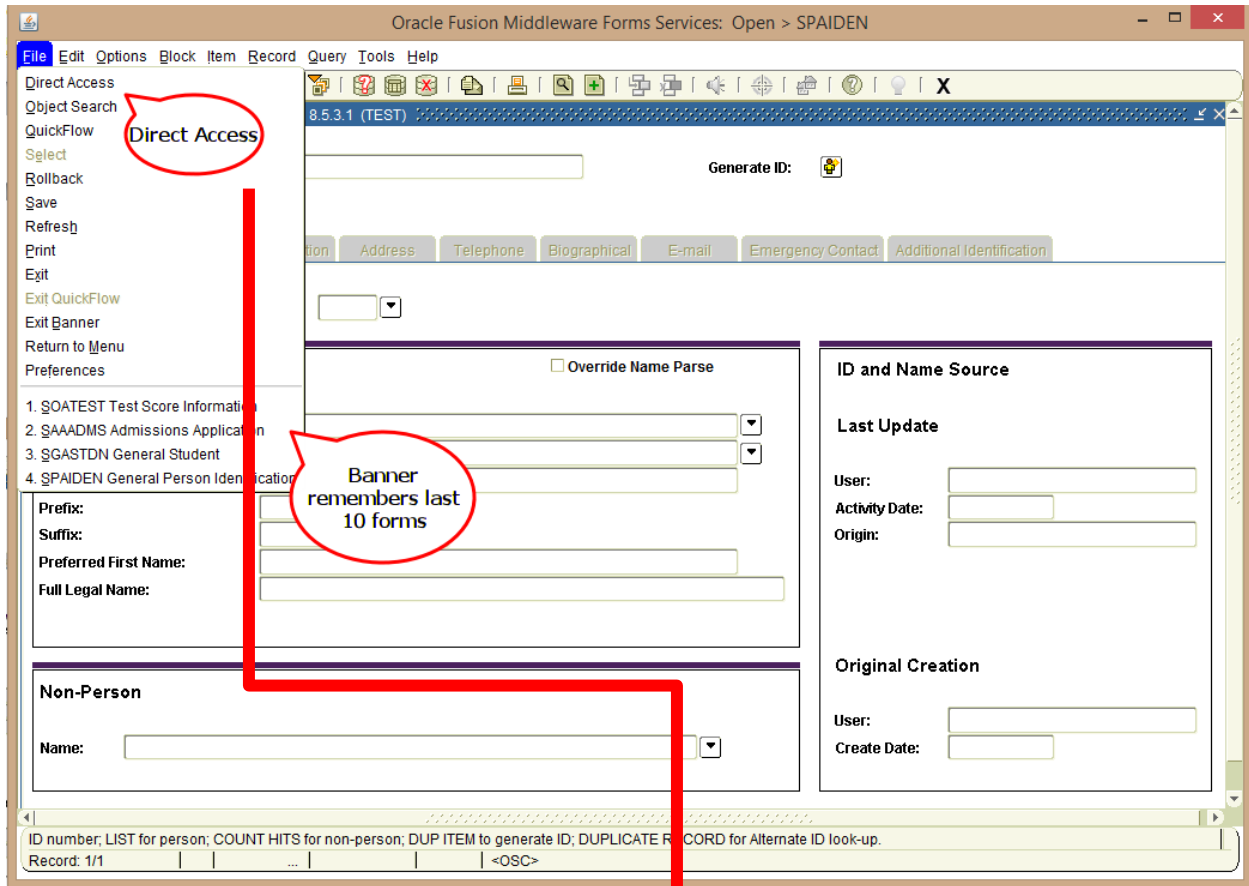
- **Direct Access** – The Go To Field will open in the Key Block
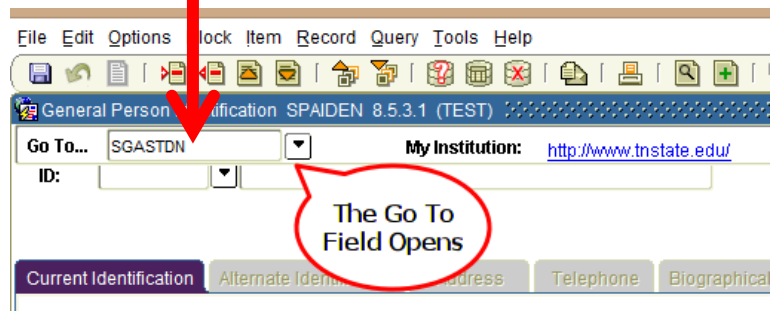
- **List of Forms Stored in File Menu** – Banner remembers the last 10 forms accessed during the *current* session

Parts of Forms

1. **Menu Bar** – Provides a variety of ways to navigate, query, enter information and access Help functions

2. **Tool Bar** – Contains icons used to navigate in Banner and provides other functions

3. **Title Bar** – Displays the form's descriptive name, the seven-character name and other information

4. **Key Block** – Where you start on a form – enter the information of who/what you want to see

5. **Radio Button** – Similar to a Check Box except only one choice can be enabled

6. **Date Field** – Used to display dates for particular occasions

7. **Check Box** – An indicator that can either be enabled (checked) or disabled (not checked)

8. **Pull-Down List** – Used to select a value from a list of *pre-defined* values

9. **List of Values** – A table of codes and descriptions that can be customized to meet the University's standards

10. **Information Block** – Data is displayed and/or entered in an Information Block

Menu Bar Components

File Menu
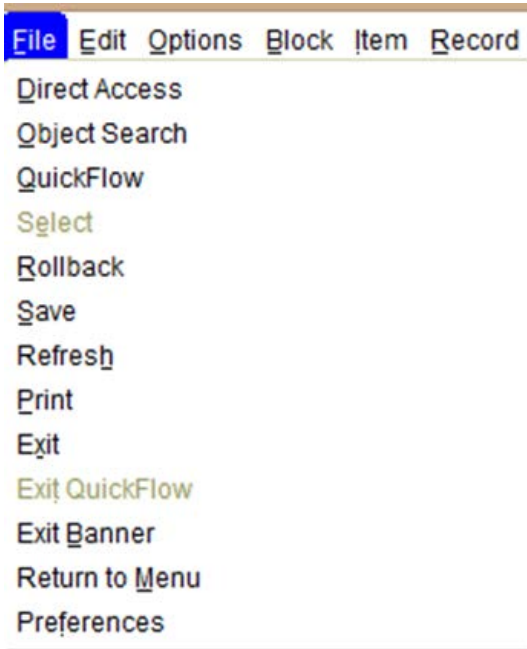
- **Direct Access** – Access a form without leaving the current form (*Keystroke F5*)
- **Object Search** – Use to locate a form or other Banner object
- **QuickFlow** – Displays the QuickFlow Form to access QuickFlows
- **Select** – Enters the selected value into a field
- **Rollback** – Returns you to the Key Block (*Keystroke Shift-F7*)
- **Save** – Saves all changes entered since last save (*Keystroke F10*)
- **Refresh** – Clears the message line
- **Print** – Prints the current window
- **Exit** – Exit form
- **Exit QuickFlow** – Closes QuickFlow
- **Return to Menu** – Takes you back to Main Menu
- **Preferences** – Displays the Personal Preferences Maintenance Form (GUAUPRF) used to customize Banner

Edit Menu
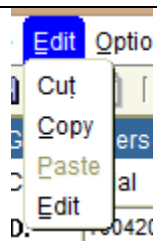
- **Cut** – Cuts selected text (*Keystroke Ctrl-X*)
- **Copy** – Copies selected text *(Keystroke Ctrl C)*
- **Paste** – Pastes cut or copied text *(Keystroke Ctrl-V)*
- **Edit** – Displays the editor window to enter and update text

Options Menu

Note: The Options Menu will vary from form to form. It is typically used to take you to other blocks within the current form or to information in another form.
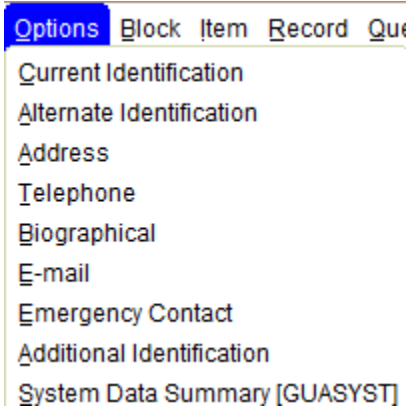
Block Menu
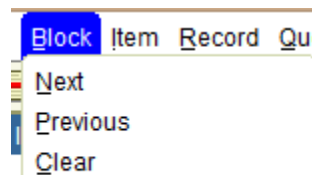
- **Next** – Moves cursor to the next Information Block – *You must Next Block to leave the Key Block (Keystroke Ctrl-Page Down)*
- **Previous** – Moves cursor to the previous Information Block *(Keystroke Ctrl-Page Up)*
- **Clear** – Clears all information in current block to put Banner in Query Mode *(Keystroke F7)*

Item Menu
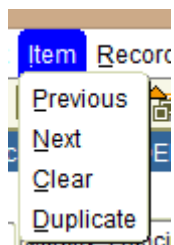
- **Previous** – Moves cursor to previous enterable field *(Keystroke Shift-Tab)*
- **Next** – Moves cursor to the next enterable field *(Keystroke Tab)*
- **Clear** – Clears, but does not delete from table, information from current field
- **Duplicate** – Duplicates contents of same field in previous record and copies it into new record

Record Menu
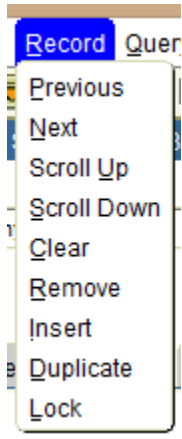
- **Previous** – Moves cursor to the first enterable field in the previous record *(Keystroke Up Arrow)*
- **Next** – Moves cursor to the next record *(Keystroke Down Arrow)*
- **Scroll Up** – Scrolls up the list of records, putting the first displayed record at the bottom of the list *(Keystroke Page Down)*
- **Clear** – Clears all information from the display of the current record
- **Remove** – Removes and permanently deletes if saved, all information for current record
- **Insert** – Inserts a new blank record in the existing records
- **Duplicate** – Duplicates content of all fields in a record and copies to a new record
- **Lock** – Temporarily locks the contents of the record so no other Banner user can update

Query Menu
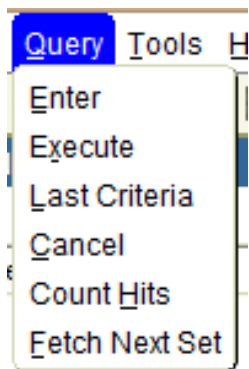
- **Enter** – Puts form into Query Mode *(Keystroke F7)*
- **Execute** – Searches the dataset and display search results *(Keystroke F8)*
- **Last Criteria** – Enters the criteria from your last search (must be in Query Mode) *(Keystroke F7 twice)*
- **Cancel** – Cancels Query and takes form out of Query mode *(Keystroke Ctrl-Q)*
- **Count Hits** – Counts the number of records that match search criteria – displays in Auto Hint line
- **Fetch Next Set** – If more records meet the search criteria than fit in the window, select this option to display the next set of records

Tools Menu

Use to access Banner Document Management and Workflows.
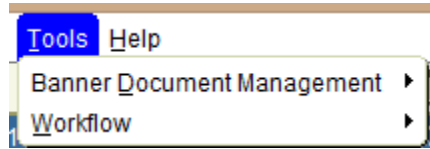
Help Menu
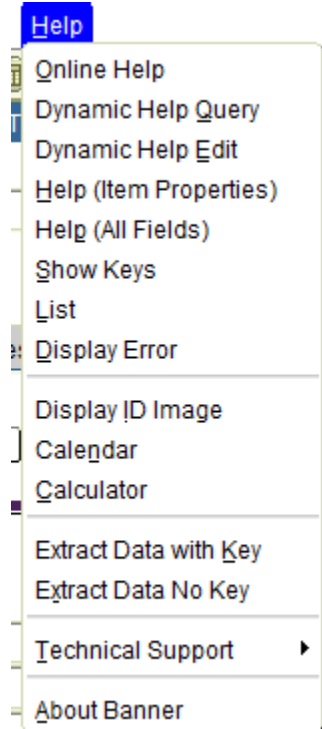
- **Online Help** – Displays online information for Banner forms and other objects *(Keystroke Ctrl-H)*
- **Dynamic Help Query** – Displays the Dynamic Help Form (GUAHELP) in Query mode
- **Dynamic Help Edit** – Displays the Dynamic Help form (GUAHELP) in Edit mode
- **Help (Item Properties)** – Displays the Oracle item properties such as type of data and maximum length for the current field
- **Show Keys** – Displays the list of functions and the equivalent keystroke
- **List** – displays the Live of Values (LOV) for the current field if "List of Values" appears in the Auto Hint/Status Line *(Keystroke Shft-F1)*
- **Display Error** – Displays code that is in error (if Oracle error) *(Keystroke Shft-F1)*
- **Display ID Image** – Displays image associated with ID, if available
- **Calendar** – Displays calendar
- **Calculator** – Displays calculator
- **Extract Data with Key** – Extracts Banner data from current block along with Key data for use in a spreadsheet
- **Extract Data No Key** – Extracts banner data without Key data for use in a spreadsheet
- **About Banner** – Displays the About Banner form (GUAABOT), which identifies current form, release number and other information

Toolbar Components

The Toolbar is a set of icons that represent shortcuts for performing common functions.
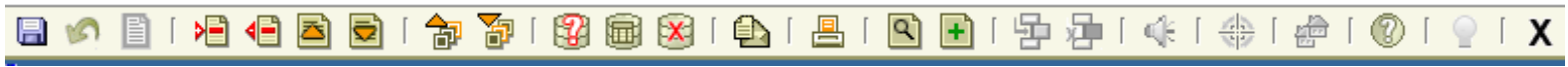
Save (F10)	View/Send Message
Rollback (Shift-F7)	Print (Shift F8)
Select (Shift-F3)	BDM – Search
Insert Record (F6)	BDM – Add Document
Remove Record (Shift-F6)	Workflow – Submit
Previous Record (Up Arrow)	Workflow – Release
Next Record (Down Arrow)	Broadcast Message
Previous Block (Ctrl-Page Up)	Fine Grain Access
Next Block (Ctrl-Page Down)	Multi-Institution (n/a)
Enter Query (F7)	Online Help
Execute Query (F8)	Supplemental Data Engine
Cancel Query (Ctrl-Q)	Exit

Name Searches

There are multiple searches available in Banner.

Single Match

When you perform a name search in Banner and a single match results, the name will automatically populate.

1. Enter the Last Name, First Name <Enter>

2. Results display
    a. Next Block to move through the form

Wildcard Search

Use the Wildcard (%) when there are different ways to spell a name. In this example, we will be looking for Kristine Hanson. Kristine can be spelled multiple ways, including Christine. Using the Wildcard (%) will include the different variations.

1. Enter the last name (hanson), enter the first name using the Wildcard (%ristine) <Enter>

2. Results display
    a. Next Block to move through the form

Name Search with Multiple Results (Reducing your Results)

When multiple results match your search, the ID and Name Extended Search Form will open.
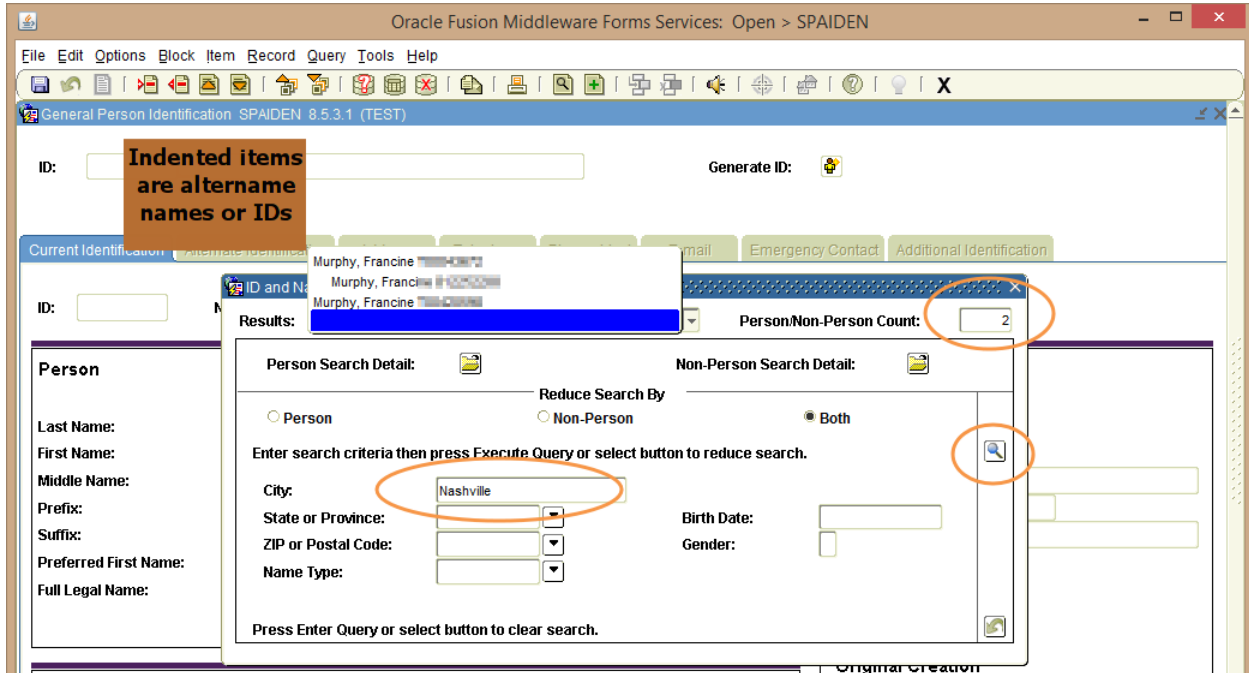
1. Enter the name search (last name, first name <Enter>)
2. The ID and Name Extended Search window will open
3. Enter the criteria to reduce your search
4. Click the Narrow Search Results Icon
   a. Results will narrow
      i. Note the Person/Non-Person Count
5. Click the pull-down list to display results
6. Select the name
7. Selected name will populate in Key Block
   a. Next Block through the form

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