

LOG ON

To log into Banner, go to www.dixie.edu, click on Faculty/Staff and choose “Connect to Banner Production System (PROD)”. (The first time you bring Banner up you will be prompted to download and install J Initiator, you must do this to logon to Banner.) The logon dialog window will appear asking for your Banner username and password.



A screenshot of the Banner Logon dialog box. It has a title bar that says "Logon" with a close button (X). There are three input fields: "Username:" with the text "jstender", "Password:" with a masked password "*****", and "Database:" which is empty. At the bottom, there are two buttons: "Connect" and "Cancel".

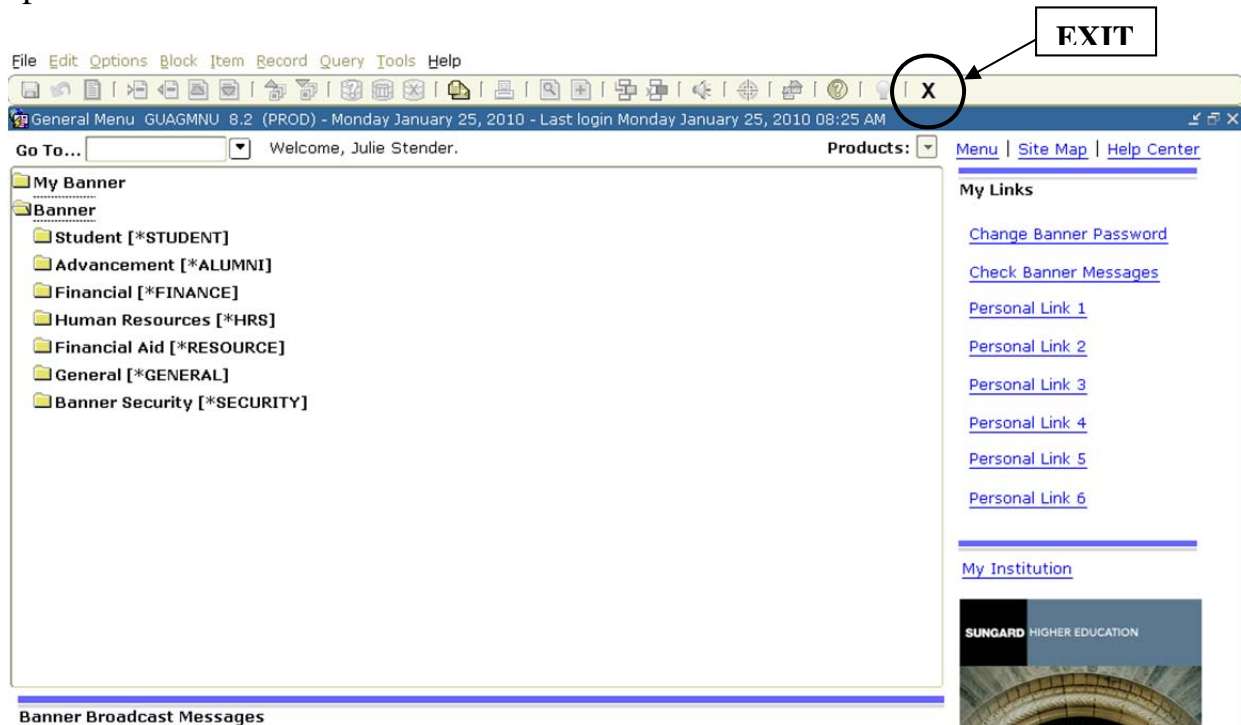
Enter your Banner Username. Press Tab.

Enter your Banner Password. Press Tab.

Choose **Connect** or press **Enter**.

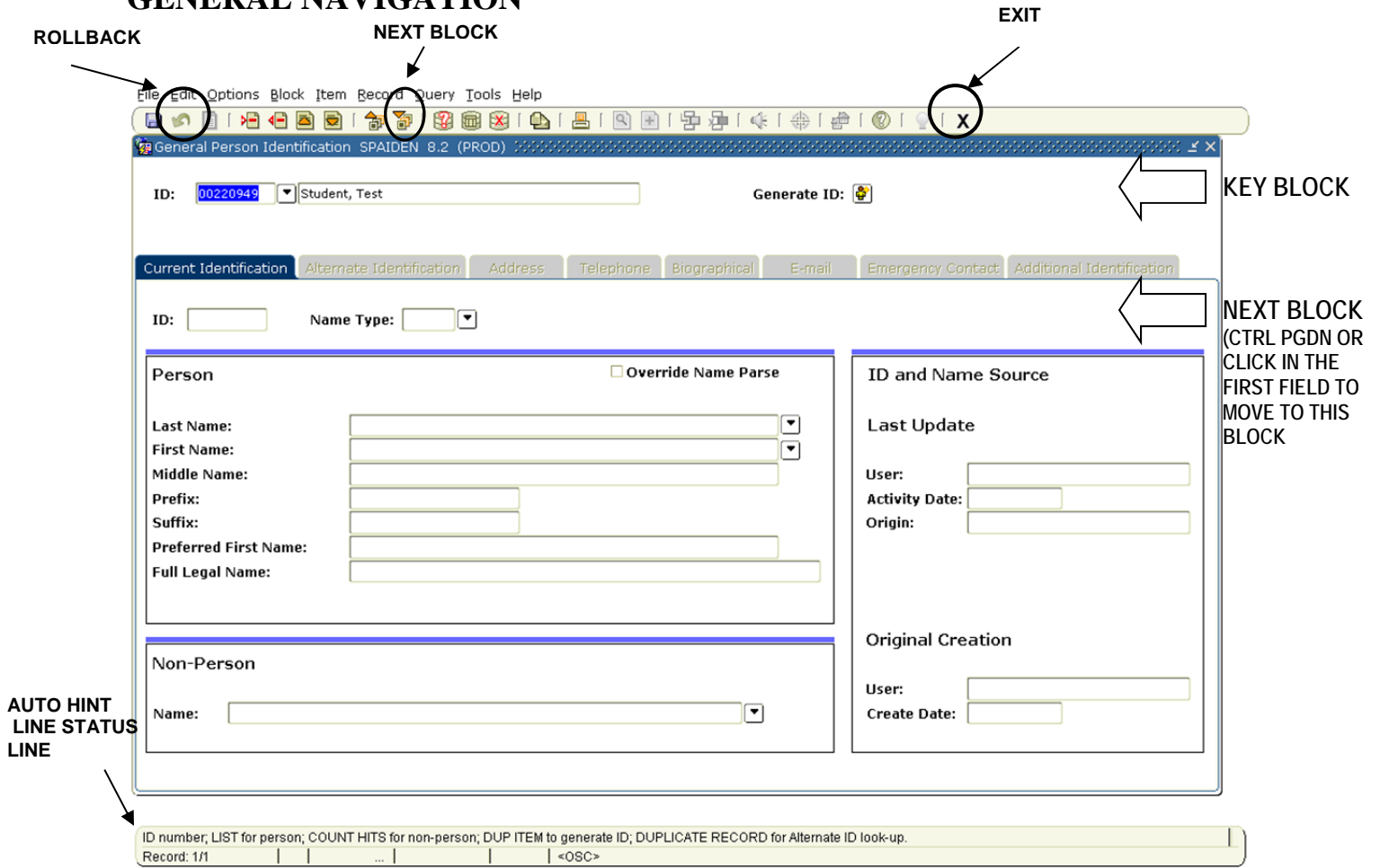
EXITING BANNER

To exit Banner always use the ‘X’. Using the close button, will leave processes open.



A screenshot of the Banner application window. The title bar shows "General Menu GUAGMNU 8.2 (PROD) - Monday January 25, 2010 - Last login Monday January 25, 2010 08:25 AM". The main content area displays a tree view under "My Banner" with folders for "Banner", "Student [*STUDENT]", "Advancement [*ALUMNI]", "Financial [*FINANCE]", "Human Resources [*HRS]", "Financial Aid [*RESOURCE]", "General [*GENERAL]", and "Banner Security [*SECURITY]". On the right, there are "My Links" and "My Institution" sections. A box labeled "EXIT" with an arrow points to the close button (X) in the title bar.

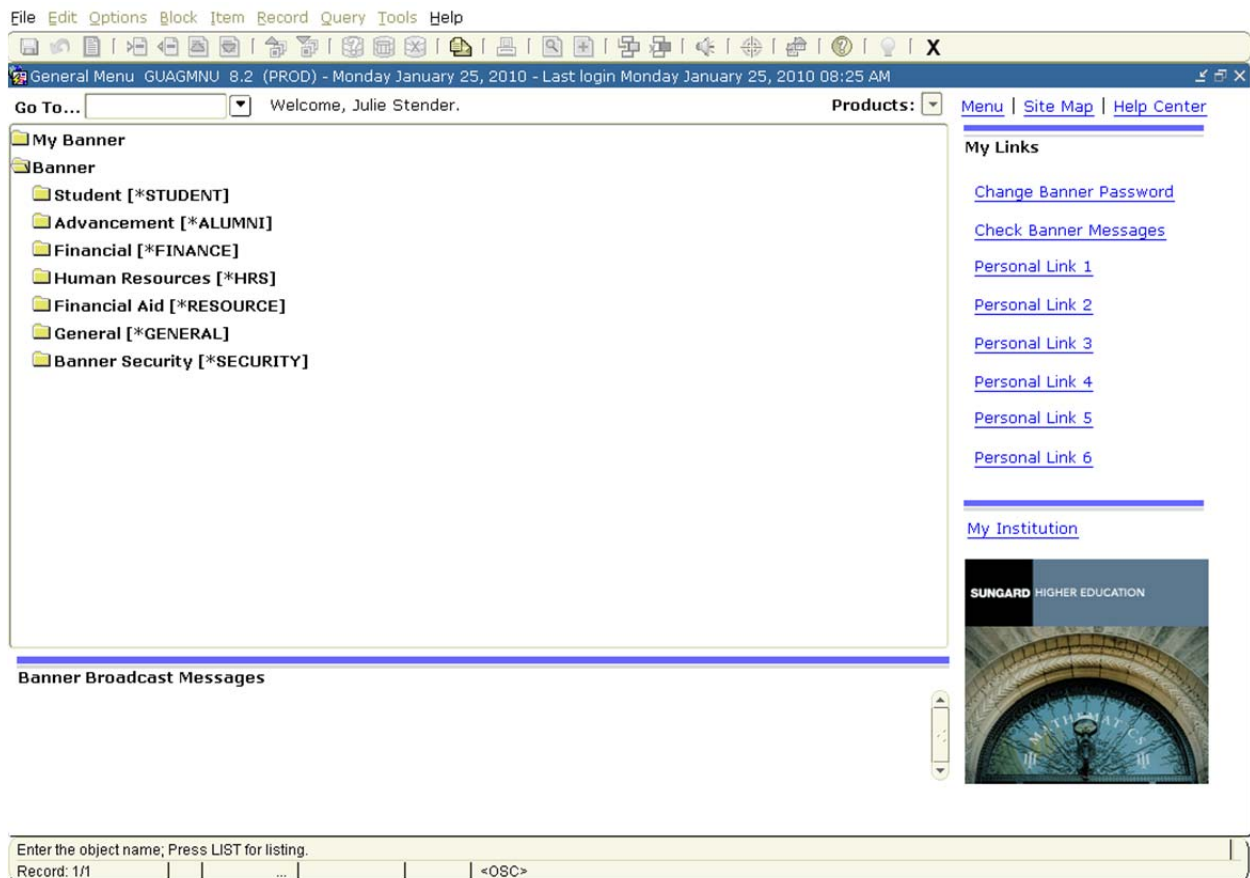
GENERAL NAVIGATION




<u>Terms</u>	<u>Definition</u>
Blocks	A block is a section of a form or window that contains related information.
Key Block	The first block contains key information. The key block determines what is entered or displayed on the rest of the form.
Next Block	To move from the key block to the next block, click in the <u>first</u> field of the next block, use CTRL PGDN or use NEXT BLOCK button.
Rollback	Clears all information (except the key block) and returns you to the first enterable field in the key block.
Blue Field Names (LOV)	Blue fields have a lookup feature. You can double-click the field to see the list or press F9. They are called LOV fields which is short for List of Values. Many Lists are defined on validation forms.
Exit	Click on the 'X' icon near the top right of the window or press CTRL Q.
Auto Hint Line	Displays a brief field description, error and processing messages and keyboard equivalents.
Status Line	Indicates record number, List of Values or query mode

MAIN MENU

When you have successfully logged into Banner, you see the Main Menu.



As you click on the ‘’ next to the menu item, the item will expand displaying a number of sub-menus. My Banner is customizable, allowing you to build your own menu of forms that relate to your specific needs.

Select the **Student System Menu**

Select the **General Person Menu**

This menu lists the basic forms used for data entry of all prospects, recruits and students. The data entered here is then available to other portions of Banner where such processes as recruiting, admissions, population selection, letter generation, financial aid, etc. are carried out. These are the forms that build the foundation of our Student system, so this is where we will start our journey into Banner.

The ‘screens’ in Banner are called ‘forms.’

ACCESSING FORMS

There are three ways to access forms in Banner.

1. DIRECT ACCESS FROM MAIN MENU.

You can enter the form name in the **Direct Access** field and press **Enter**.
The Student Identification Form (screen 003) is SPAIDEN.

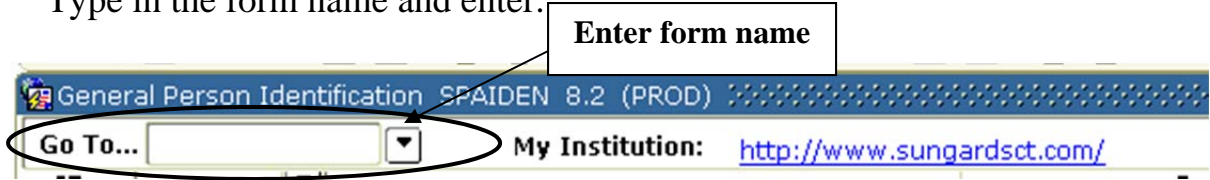
A screenshot of the Banner main menu interface. The 'Go To...' dropdown menu is open, showing 'SPAIDEN' selected. A callout box labeled 'Direct Access field' points to this dropdown. The main menu area displays a tree structure under 'Banner' with sub-items: Student [*STUDENT], Advancement [*ALUMNI], Financial [*FINANCE], Human Resources [*HRS], Financial Aid [*RESOURCE], General [*GENERAL], and Banner Security [*SECURITY]. Below the menu is a 'Banner Broadcast Messages' section. At the bottom, a status bar shows 'Record: 1/1' and '<OSC>'.

A screenshot of the SPAIDEN form. The title bar shows 'General Person Identification SPAIDEN 8.2 (PROD)'. A callout box labeled 'Exit' points to the window close button (X). Below the title bar, there is an 'ID:' field. A callout box labeled 'Form name and description' points to the 'General Person Identification' text in the title bar. The main form area has tabs for 'Current Identification', 'Alternate Identification', 'Address', 'Telephone', 'Biographical', 'E-mail', 'Emergency Contact', and 'Additional Identification'. The 'Current Identification' tab is active, showing fields for 'ID:', 'Name Type:', 'Person' (Last Name, First Name, Middle Name, Prefix, Suffix, Preferred First Name, Full Legal Name), 'Override Name Parse', 'ID and Name Source', and 'Last Update' (User, Activity Date, Origin).

To move back to the Main Menu, choose the Exit button ('X').

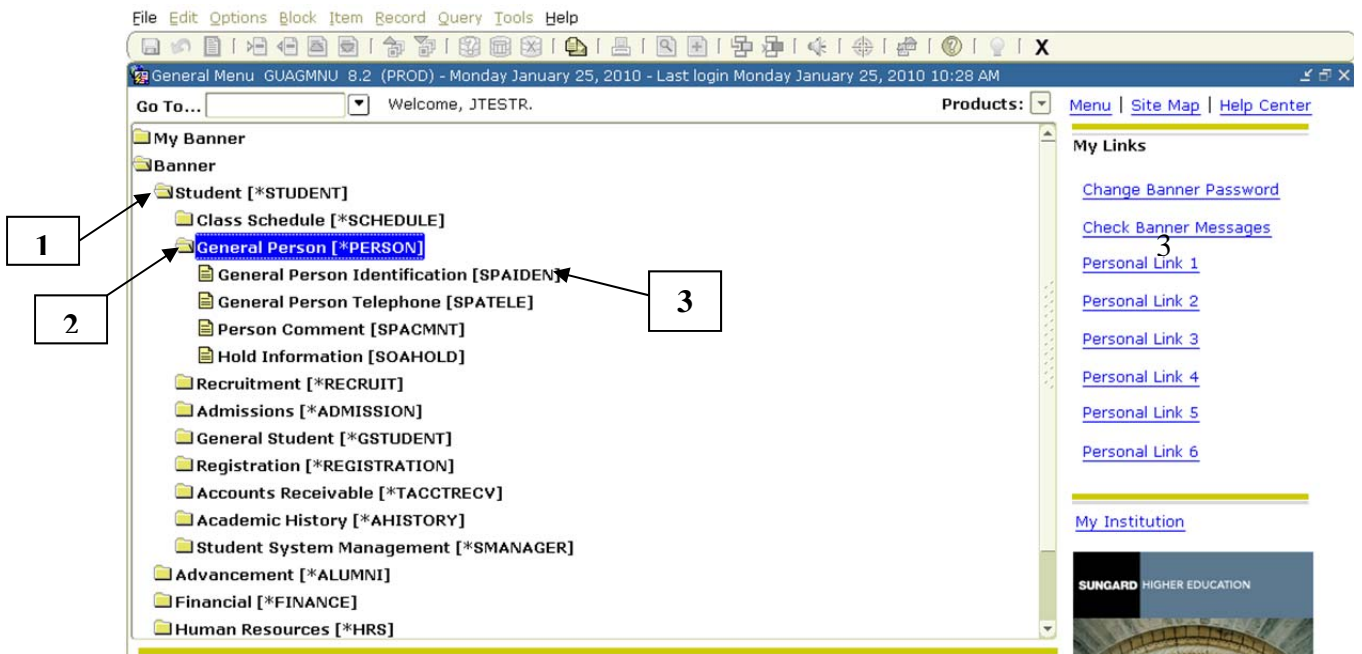
2. DIRECT ACCESS FROM A FORM

If you are not at the main menu that has the direct access field, choose File/Direct Access from the menu bar. You will see the following box. Type in the form name and enter.



3. ACCESS USING MENUS

To access forms from the main menu, choose Student, then General Person Menu. Next double click on the General Person Identification Form which is the SPAIDEN form.



CREATING A PERSONAL MENU

You can create a personal menu of items that are most important in your daily work under 'My Banner'. You can add or delete forms from your 'My Banner' Menu as you learn more about the forms you use most. Your 'My Banner' menu is tied to your ID so you can use it from any computer. A 'My Banner' menu can include forms, jobs, menus and QuickFlows.

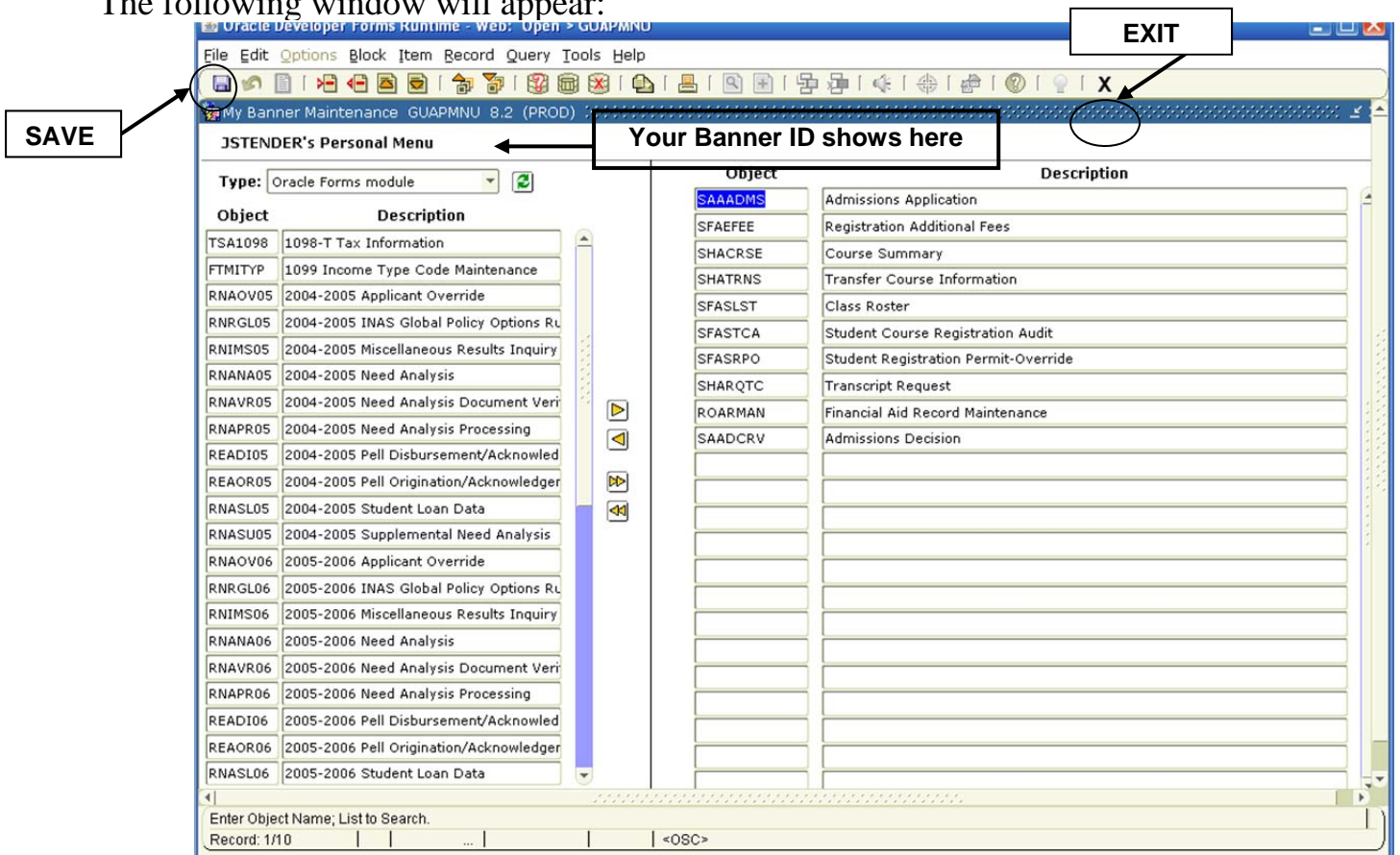
The My Banner Maintenance Form (**GUAPMNU**) lets you create and change your 'My Banner' menu.

Step 1: Accessing the form.


Using Direct Access: Type **GUAPMNU** in Direct Access window and press Enter to create or change your 'My Banner' menu.

Using Menu Access: Choose General System Menu, System Functions / Administration Menu, Menu/Preference Maintenance and then My Banner Maintenance Form.

The following window will appear:



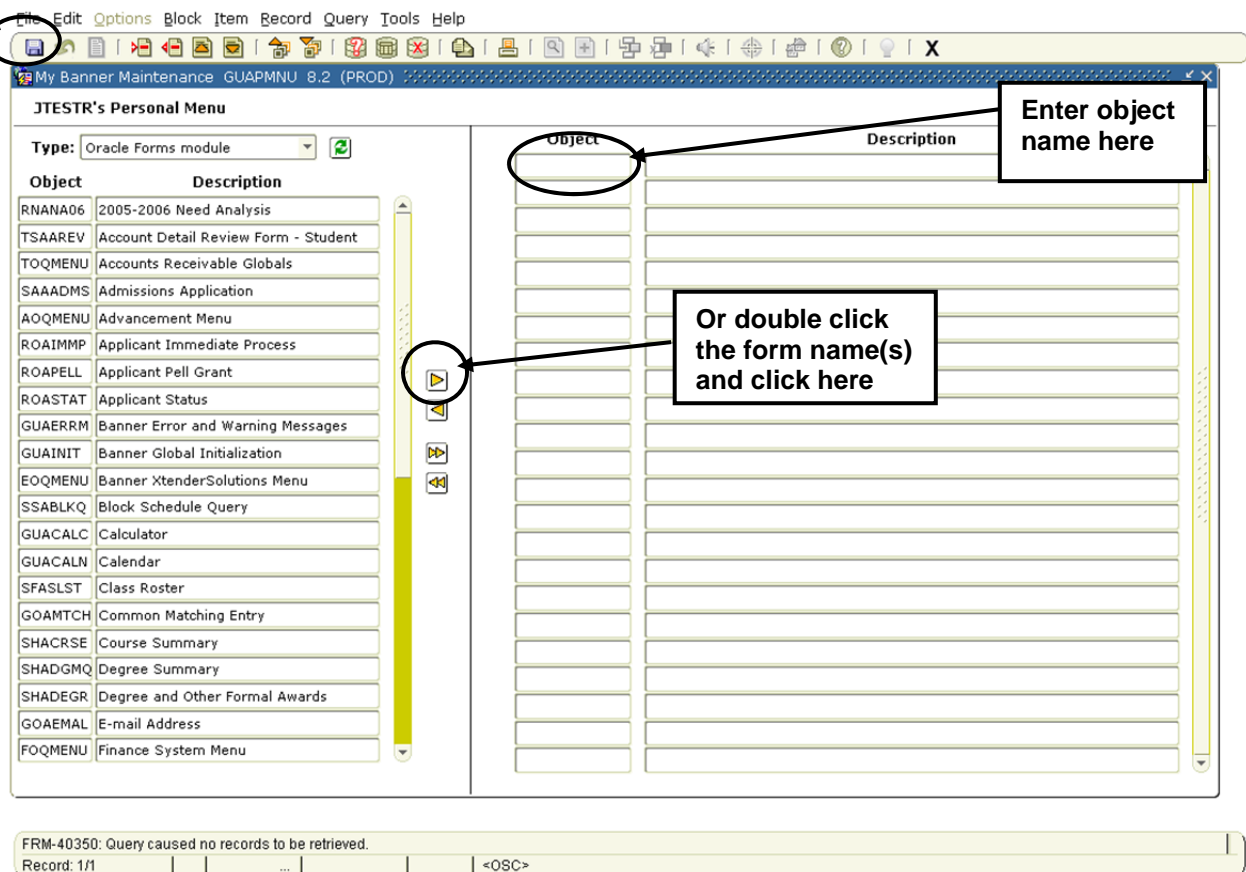
Step 2: Adding items to your Personal Menu

- Place the cursor in the blank Name field in the right pane.
- Type in the object's 7 character name (Example - SPAIDEN) (or double click on one or more form names and click ).
- Press **Enter**. (The object's type, description, and name appear in the right pane.)
- (Optional) Customize the object description.
- Save** the additions or changes by choosing the **Save** button, F10 or File/Save from the menu.
- To add additional entries, press the key **DOWN ARROW**.
Note: Repeat b – f to add more entries. **SAVE** before exiting.

Step 3: EXIT.

Select the 'X'.

SAVE



Object	Description
RNANA06	2005-2006 Need Analysis
TSAAREV	Account Detail Review Form - Student
TOQMENU	Accounts Receivable Globals
SAAADMS	Admissions Application
AOQMENU	Advancement Menu
ROAIMMP	Applicant Immediate Process
ROAPELL	Applicant Pell Grant
ROASTAT	Applicant Status
GUAERRM	Banner Error and Warning Messages
GUAINIT	Banner Global Initialization
EOQMENU	Banner XtenderSolutions Menu
SSABLKQ	Block Schedule Query
GUACALC	Calculator
GUACALN	Calendar
SFASLST	Class Roster
GOAMTCH	Common Matching Entry
SHACRSE	Course Summary
SHADGMQ	Degree Summary
SHADEGR	Degree and Other Formal Awards
GOAEMAL	E-mail Address
FOQMENU	Finance System Menu

FRM-40350: Query caused no records to be retrieved.
Record: 1/1

Banner has an option that allows you to have Banner open directly to your 'My Banner' Menu rather than the default Menu.

To make your 'My Banner' Menu the default menu:

1. From the main menu in Banner, select **File**, select **Preferences**, and select **Menu Settings**.
2. In the User Default area, type in ***PERSONAL**, select OK.

Deleting an object from your 'My Banner' Menu

1. In the right pane, select each object (will appear white) you want to delete.
2. Click the **Remove Selection** button in the middle of the form. The selected objects are deleted.
3. Select the **SAVE** function.

SAVE

File Edit Options Block Item Record Query Tools Help

Banner Maintenance GUAPMNU 8.2 (PROD)

JTISTR's Personal Menu

Type: Oracle Forms module

Object	Description
RNANA06	2005-2006 Need Analysis
TSAAREV	Account Detail Review Form - Student
TOQMENU	Accounts Receivable Globals
SAAADMS	Admissions Application
AOQMENU	Advancement Menu
ROAIMMP	Applicant Immediate Process
ROAPELL	Applicant Pell Grant
ROASTAT	Applicant Status
GUAERRM	Banner Error and Warning Messages
GUAINIT	Banner Global Initialization
EOQMENU	Banner XtenderSolutions Menu
SSABLKQ	Block Schedule Query
GUACALC	Calculator
GUACALN	Calendar
SFASLST	Class Roster
GOAMTCH	Common Matching Entry
SHACRSE	Course Summary
SHADGMQ	Degree Summary
SHADEGR	Degree and Other Formal Awards
GOAEMAL	E-mail Address
FOQMENU	Finance System Menu

Object	Description
RNANA06	2005-2006 Need Analysis
SOAHOLD	Holds Query-Only
SGASTDQ	General Student Summary
SGASTDN	General Student
SPATELE	General Person Telephone
SPAIDEN	General Person Identification
SHADEGR	Degree and Other Formal Awards
SHADGMQ	Degree Summary
TSAAREV	Account Detail Review Form - Student

Remove Selection

Enter Object Name, List to Search.

Record: 1/9