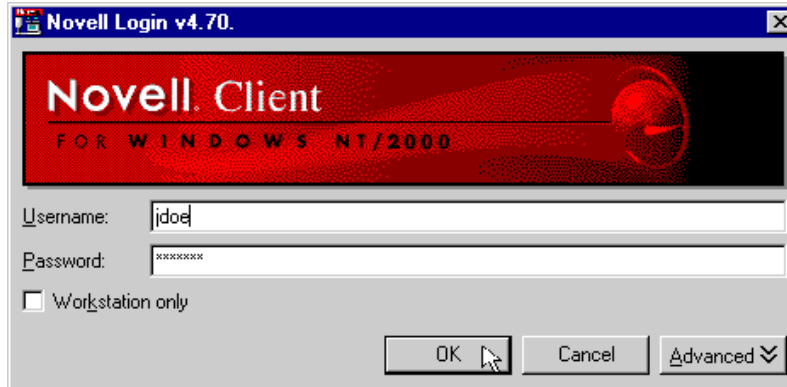
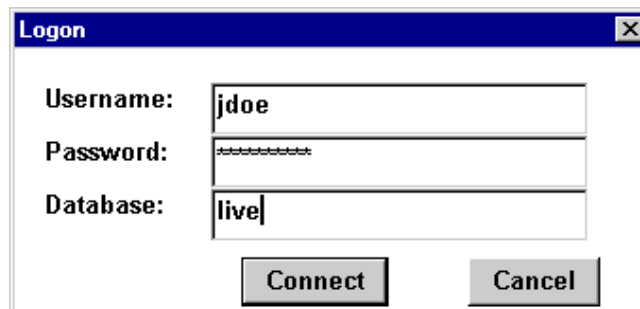


1. Logging in to Banner

- Choose the Banner icon in your Apple menu or on your desktop. This will bring up the Novell login dialog box, shown below.



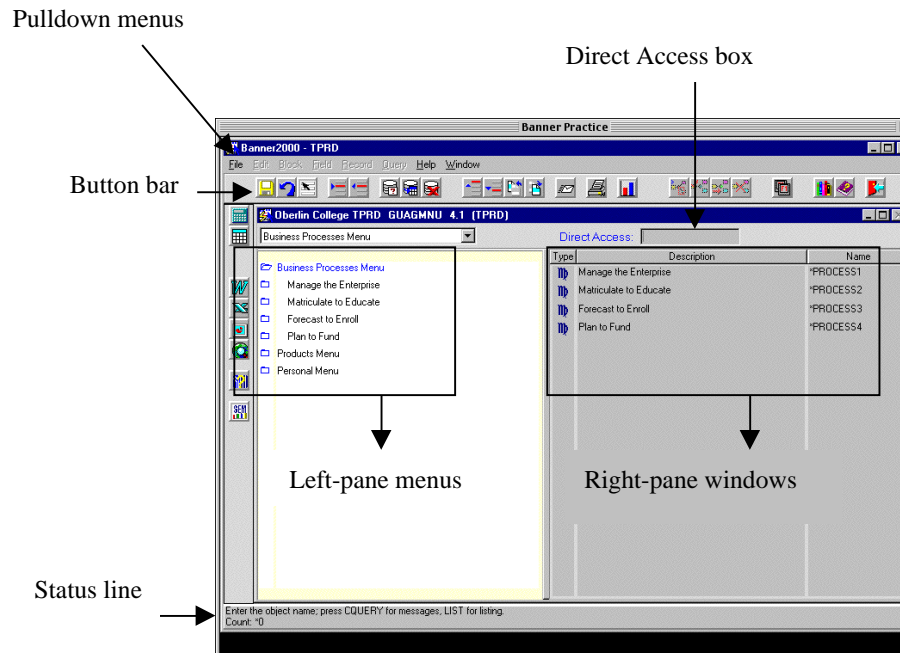
- The Username and Password in this box will default in. Unless you have been specifically instructed to do so, DO NOT CHANGE the Username and Password. All you need to do in this dialog box is click OK.
- At this point, a few screens will pop up, and then your Banner login dialog box will appear, shown below.



- In this dialog box, enter your Banner username, password, and the database you want to access. (To obtain a Banner username and password, contact your Banner module administrator.) When you have entered the username, password, and database, click the Connect button.

2. The Banner Main Window

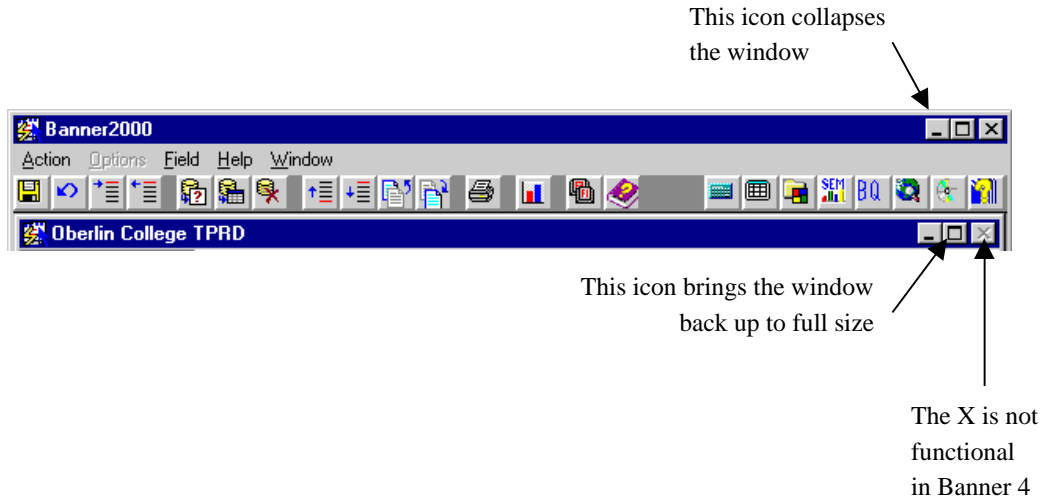
When you first log into Banner, you will see the Main Menu, which looks like this:



Here are the features of your Banner Main Window:

- **Pulldown menus:** these behave just like pulldowns in Word or Excel: click and hold on the menu item for a list of options. Note that the key function **Shift + F10** allows you to use your up and down arrows to navigate your pulldown menus.
- **Banner button bar:** the button bar icons also behave just like the toolbar in Word or Excel. Note that when you hold your cursor over a button bar icon, the function of that icon appears in a yellow balloon.
- **Status line:** the status line at the bottom of your screen is where you can view any error messages, record counts, etc. Make a habit of checking your status line often during your session in Banner.
- **Direct Access box:** your cursor is blinking in the Direct Access box. Type in the name of the form you want and hit Return.
- **Left and right pane menus:** in the left pane are the category menus. Clicking on a category menu will bring up the contents of that menu in the right pane. For example, clicking the **Product Menu** in the left pane will bring up all the Banner modules in the right pane.

If you are unfamiliar with working on a Windows machine, the lines and X's in the upper right-hand corner may seem strange to you. Here's what they do:

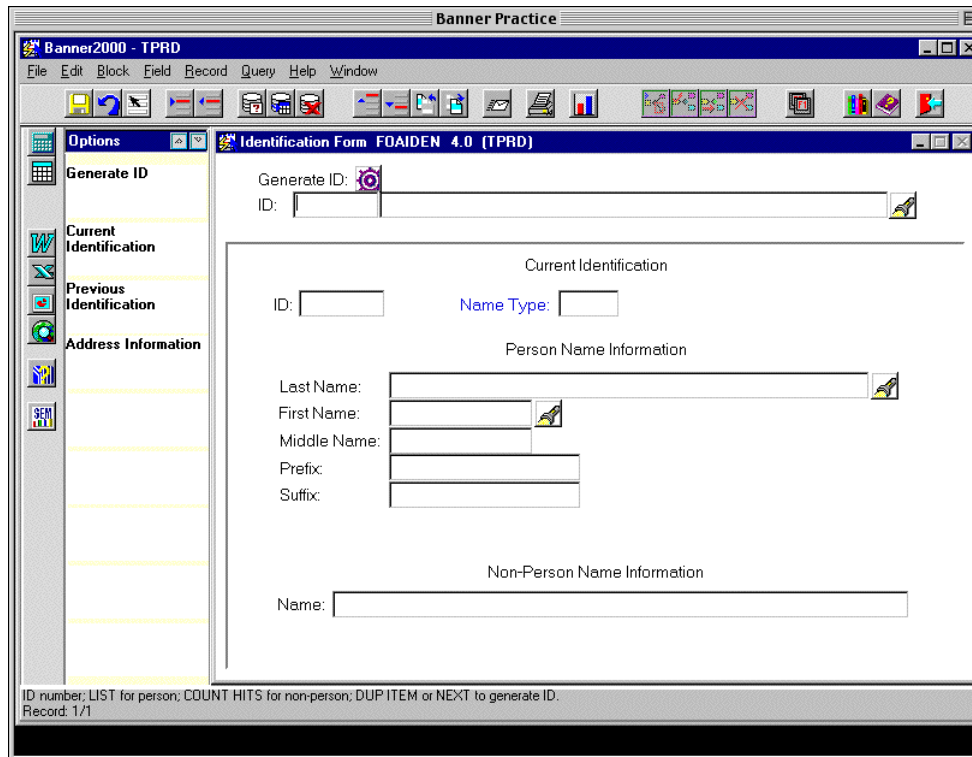


You will probably want to play a bit with these icons to get used to how they affect your windows. Note that the X button, which closes windows in other applications, is not functional in Banner 4. **Do not try to use the X button to close windows in Banner.**

Note that choosing "Best" from your File menu in the Banner Main Menu will give you the window setup that Citrix considers "best" for performance. However, when you do this you will lose your top window bar (the one that contains your clock and other icons). To get your top window bar back, hold down the Option + Control keys and then use your mouse to choose "Best" again from the File menu. This will "unbest" your screen.

3. Navigating the Banner forms

The vast majority of your work in Banner will be done in the **forms**. These are the screens where you actually enter and retrieve data from the system. Go to form FOAIDEN for an example of a Banner form.



The screenshot displays the Banner2000 - TPRD Identification Form FOAIDEN 4.0 (TPRD) interface. The window title is "Banner Practice" and the application title is "Banner2000 - TPRD". The menu bar includes File, Edit, Block, Field, Record, Query, Help, and Window. The toolbar contains various icons for navigation and editing. The left sidebar shows a tree view with "Options" selected, containing "Generate ID", "Current Identification", "Previous Identification", and "Address Information". The main area is divided into several sections: "Generate ID" with a "Generate ID" button and an "ID:" field; "Current Identification" with an "ID:" field and a "Name Type:" field; "Person Name Information" with fields for "Last Name:", "First Name:", "Middle Name:", "Prefix:", and "Suffix:"; and "Non-Person Name Information" with a "Name:" field. At the bottom, a status bar displays "ID number; LIST for person; COUNT HITS for non-person; DUP ITEM or NEXT to generate ID." and "Record: 1/1".

The screen you are looking at is your **main window**, where the form data is located. The main window is divided into sections, or **blocks**. Blocks are often separated from one another by boxes and lines on the form.

The top block is called the **key information** window, sometimes referred to simply as the **key**. The key is the first thing to appear on most Banner forms and is the deciding factor for the data that appears on the rest of the form. All the information that is displayed on the form is driven by the information that you enter in the key.

Next in FOAIDEN are three blocks: one for current identification, one for person name identification, and one for non-person name identification. Each of the white rectangular spaces in the blocks is called a **field**.

Populating the form with data

There are several ways to **populate** a Banner form; in other words, move between different fields and different blocks in a form and see what data is in there.

- If you are a **mouse** user: put your cursor in an enterable field (one where your cursor turns from an arrow into an I-bar) and click. This will populate the block. To populate the entire form, make sure to click in a field towards the bottom of the form.
- If you are a **keyboard** user: hold down the Ctrl key and the Page Down (or the Page Up) key. This is the key function for "Next Block" and it will populate the next block in the form.
- If you are a **button bar** user: click the Next Block icon in your toolbar. This will populate the form.
- If you are a **pulldown menu** user: click the Block pulldown menu and choose the Next option. This will populate the form.

Navigating branch windows

The majority of forms in Banner contain branch windows: windows of the form that are layered underneath the main window. Think of the branch windows as blocks that would be in the current form except that there's not enough room for them there.

You can access your branch windows a number of different ways:

- If you are a **mouse** user: clicking on the items in the Options menu will often take you to branch windows of the form you're currently in.
- If you are a **keyboard** user: using the Ctrl + Page Down (or Page Up) key function will bring up the first branch window. Repeat to bring up successive windows.
- If you are a **button bar** user: click the Next Block icon in your toolbar. This will bring up the first branch window. Repeat to bring up successive windows.
- If you are a **pulldown menu** user: click the Block pulldown menu and choose the Next option. This will bring up the first branch window. Repeat to bring up successive windows.

Navigating between forms

You have some choices about how you move from form to form.

- Exiting the form you are currently in, either by clicking the **Exit** button or using the **Ctrl + q** key function, will take you back to the Main Menu, where you can enter another form name in the Direct Access box. You may have to hit Exit several times if you have moved into a number of forms in succession.

- You can also use Direct Access to move between forms by choosing **Direct Access** from your **File** pulldown menu. Choosing Direct Access will bring up a selection box on your screen where you can type the name of the form you need into the selection box and hit Return or click the Start button. This will bring up the new form.
- No matter what method you use to move between forms, Banner will always pull the data from the current form into the new form.

The Options menu

Another way to navigate the Banner forms and windows is by using the **Options** menu, which is always present in the left-hand window pane no matter what form you are in. Clicking on an option in the Options menu will take you to that window or form. Notice that as you navigate through the forms, the options available to you in your Options menu change.

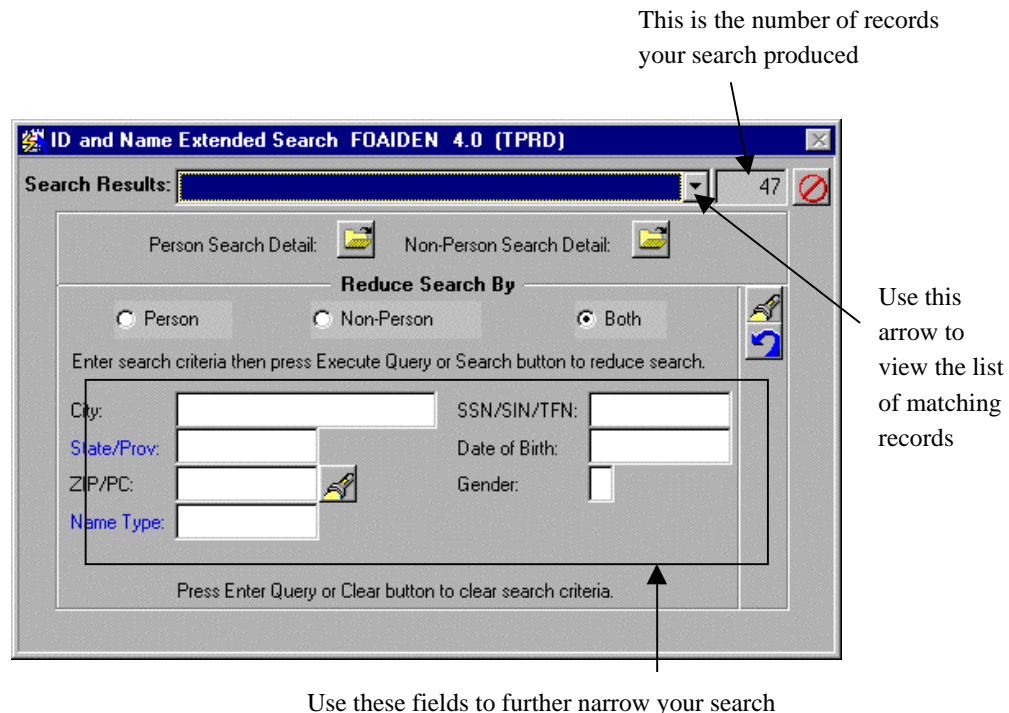
4. Querying in Banner

One of the most useful features of Banner is the ability to **query** for information already entered in the database. There are two ways to query in Banner: doing a search within a key block and doing a search in a dedicated query form.

Performing a key block search

Follow these steps to perform a query in the key block of a given form:

- Put your cursor in the key ID field. If there is an ID number currently in the field, hit **Delete** or choose **Clear** from your **Field** pulldown menu to clear the ID out of the field.
- When the ID field is clear, hit your **Tab** key. This will put your cursor in the Name field.
- If you know the first and last names of the person you want (or the code for the vendor you want), type them in the Name field using lastname, comma, space, firstname protocol. Example: **Doe, Jane**
- Hit the **Return** key. If there is only one person in the database with that last and first name, the Name field will automatically populate with the person's name and ID number.
- If there is more than one person with that name in the database, the **Extended Search dialog box**, shown below, will pop up:

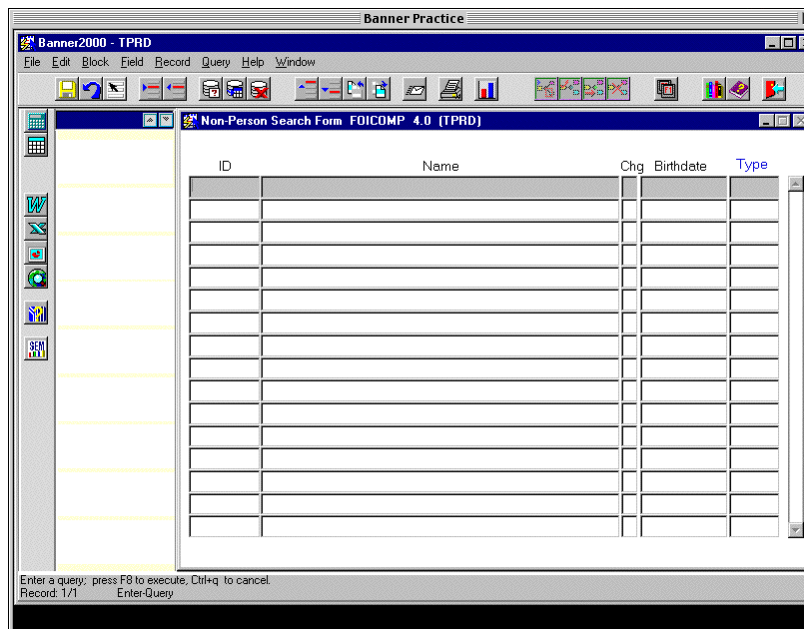


Here are the features available in the Extended Search dialog box:

- Use the pulldown arrow next to the blue-out **Search Results** field to pull down a list of records that matched your search criteria. To narrow this list to non-person records only, click in the **Reduce Search By: Non-Person** radio button. To close the list up, either click on the blank row with your mouse or hit Tab **with the blank row highlighted**.
- If you find the record that you want in this list, double-click or hit Return with the record highlighted to bring it back to your form.
- If you cannot identify the record you want from this list, close the list and Tab or click in one of the additional search criteria fields. You can narrow the list by entering a city, state, ZIP code, gender, SSN, or date of birth and then clicking the flashlight button or the **F8** key (the key function for **Execute Query**).
- If you have successfully narrowed your search, you'll see the number of records reduced. You can now scroll through the new list to identify the record you need.
- If your search reduction is unsuccessful, the word Default will appear in the Search Results field. To return to your previous list, hit the **Rollback** button or **F7**.
- To exit the Extended Search dialog box without selecting a record, click the button with the red circle on it next to the Search Results field.

Performing a search in a query form

You also have the option of performing a search in a dedicated query form. A common query form in the Finance module is FOICOMP, shown below.



If you know the name of the non-person you need, type the name in the Name field. You have several options in terms of performing the query itself:

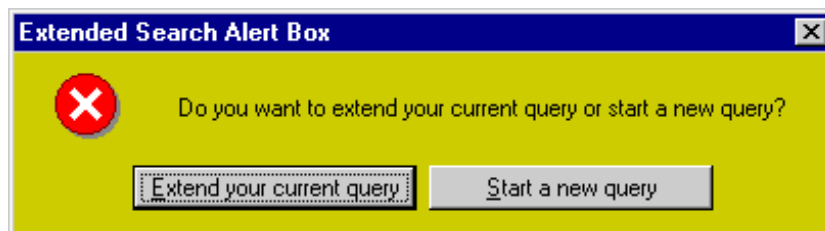
- If you are a **mouse** or a **button bar** user: click the Execute Query icon in the toolbar.
- If you are a **keyboard** user: press the F8 button on your keyboard. This is the key function for Execute Query.
- If you are a **pulldown menu** user: click on the Query pulldown menu and choose Execute.

When you've executed the query, the search results will populate in FOICOMP.

Customizing a key block search in a query form

If you have performed a search in the key block which produces a good number of matching records in the Extended Search dialog box, you can use the query form to better manage your search.

- In the Extended Search dialog box, click the Non-Person Search Detail button (the yellow folder). This will take you automatically to FOICOMP and populate the query form with the search you've already performed (you may need to wait a few moments for the search to populate).
- Using the Enter Query button or the F7 keystroke, enter a query. A dialog box, shown below, will pop up. Click the **Extend your current query** button to customize your search.



- Your query form will clear. Now, you can enter further criteria, such as part of a vendor code, to further narrow your search. When you've entered the new criteria, Execute the query. The narrowed results (if any) will now show in the query form.

Using the wildcard symbol to search

If you've entered what you think is the correct name, ID number, or SSN, but the system fails to find the person you need, do not assume that the person does not have a record in the system.

Banner is very picky about the way you query for information in the database, and a query feature called **wildcarding** will help you find the record you need. The two wildcard symbols are % and _. Both stand for any character; the difference is that % stands for any amount of characters, whereas _ can only stand for one character. You can use wildcards in a number of ways. For example:

- All records that begin with Ab = **Ab%**
- All records that contain ab = **%ab%**
- All records that have ab as the final two characters = **%ab**
- All records that have b as the second character = **_b%**

You can use these wildcard symbols when querying in both the key block and in query forms.

A few notes about querying

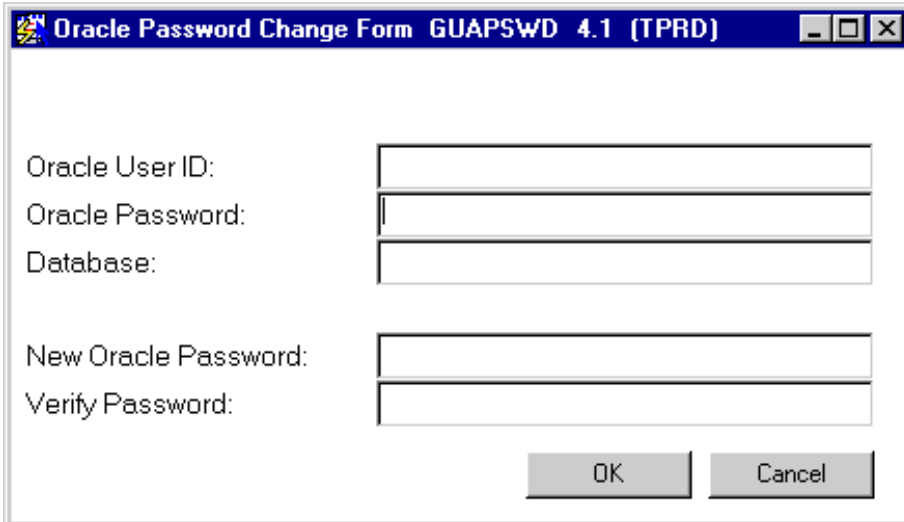
- You can decide whether you want a search to be case-sensitive or not by clicking in the "Case Sensitive Query?" radio buttons at the bottom of the query form
- To clear a query and enter a new one, select **Enter** from your Query pull-down menu, or click the **Rollback** button.
- To exit a query form, you need to press the **Exit** button twice: once to exit the query function and then again to exit the form.

5. Changing your Banner password

When you receive your Banner access for the first time, you will receive a Banner Username and password. Initially, both your Username and Password will be the first letter of your first name and the first seven letters of your last name. The first thing you should do when you log on to Banner is change your password; this insures that you and you alone know your password.

From the Main Menu, type form name **GUAPSWD** in the Direct Access box. This will take you to the User Password Change form, shown below. There are five fields in the form:

- The first field will automatically fill in with the user ID you used to log on.
- Put your cursor in the second field, and type in your **current** password.
- The third field will automatically fill in with the database you're in.
- Tab to the fourth field, and type in the **new** password you've chosen.
- Tab to the fifth field and **re-enter** the new password to confirm it.
- Hit the **Save** button, and you're done!



The screenshot shows a standard Windows-style dialog box with a blue title bar. The title bar text is "Oracle Password Change Form GUAPSWD 4.1 (TPRD)". The main area of the dialog contains five text input fields, each preceded by a label: "Oracle User ID:", "Oracle Password:", "Database:", "New Oracle Password:", and "Verify Password:". The "Oracle Password:" field has a vertical cursor at the beginning. At the bottom right of the dialog, there are two buttons: "OK" and "Cancel".

NOTE: Under no circumstances should you ever give your password to anyone, nor should you ever allow anyone to log in under your name and password. Remember, **you are responsible** for any false or corrupted data that enters the system under your name and password. Please, help us protect you and the integrity of the system by **keeping your password private**.

6. Banner key functions

Action	Keystroke
Accept (Save)	F10
Block menu	F5
Break	N/A
Cancel	Esc
Clear block	Shift + F5
Clear form	Shift + F7
Clear field	Ctrl + u
Clear record	Shift + F4
Delete record	Shift + F6
Display error	Shift + F1
Duplicate item	F3
Duplicate record	F4
Edit	Ctrl + e
Enter Query	F7
Execute Query	F8
Exit	Ctrl + q
Help	F1
Insert record	F6
List of values	F9
Main menu	Ctrl + .
Next block	Ctrl + page down
Next primary key	Shift + F3
Next record	Shift + down arrow
Next set of records	Ctrl + >
Option menu	See note below
Previous block	Ctrl + page up
Previous field	Shift + Tab
Previous menu	Ctrl + Enter
Previous record	Shift + up arrow
Print	Shift + F8
Rollback	Shift + F7
Save	F10
Select (exit w/value)	Shift + F3
Show keys	Ctrl + F1
Toggle insert/replace	N/A

Note: To see your pull-down menus, press Shift + F10, then arrow left or right to highlight the pull-down you want, then down or up arrow to highlight the menu item, then Enter to perform the task. If you've lose your top bar (i.e., the one with your clock and Apple menu), hold down the Option + Control keys and use your mouse to choose "Best" from the File menu. Your top bar should reappear.