Banner Navigation

Session Organization

This session was designed to be instructor-led and follows traditional classroom activities you may have been previously exposed to. In this course, the instructor will present information about how to use Banner and – at times – ask that you complete activities and exercises in this manual. You will find that following along in the manual will help you to successfully complete this course.

Please avoid trying to follow the instructor using your computer until asked to do so.

Session Manual Key	
	Discussion: Look, listen, interact, and learn! These pages will focus on concepts, highlight certain topics/items, or even ask for your feedback.
	Procedure: Look, listen. That's basically it…watch the demonstration and follow along in your manual.
	On Your Own Activity: The instructor talked about it, you've seen it…now perform the task following the steps provided.
	Exercise: Test your knowledge and skills! Complete the exercise per the instructions. If you need help…**just ask!** We want you to *succeed*.

Banner Navigation - Session Agenda

Navigation - Session Overview

In Banner Navigation, you will learn how to:

- Log on to Banner

- Navigate within Banner

- Locate and Access Forms

- Execute basic Banner inquiries

- Understand FOAPAL

Upon completion of this class you will be an important part of the University-wide Banner network.

Lesson 1: Introduction to Banner - Overview

Introduction Overview

Assuming the Banner Information System is new to you, it is critical that you understand its role and function at WSU, the information systems that interface with it, and its major features.

By the end of this short discussion you will have identified the following:

1. The functions and major features of Banner.

2. The tools for navigating within Banner.

Lesson 1: Introduction to Banner
Overview

Topic 1: The Function of Banner

Banner is a *suite* of products. These products access a **common database** so that information can be shared across different systems that administer the numerous functions of the University. Some of the systems that Banner supports within the University are Student, HRMS, Alumni and FMS.

As a processor of information at WSU, you are certain to have diverse needs that vary widely in your unit. You may use Banner to access one system or many systems.

Topic 2: Systems Interfacing With Banner

Banner is a University-wide system which enables you to track, maintain and report your department's important information.

Let's begin by taking an overall look at Banner and its connection to other operations here at WSU, as shown with the graphic on the right.

Purchasing
Payables System
(PPS)

Financial
Management System
FMS

Student
System

Banner

Human
Resource System
(HRMS)

Alumni
Development
System

Cashiering
System
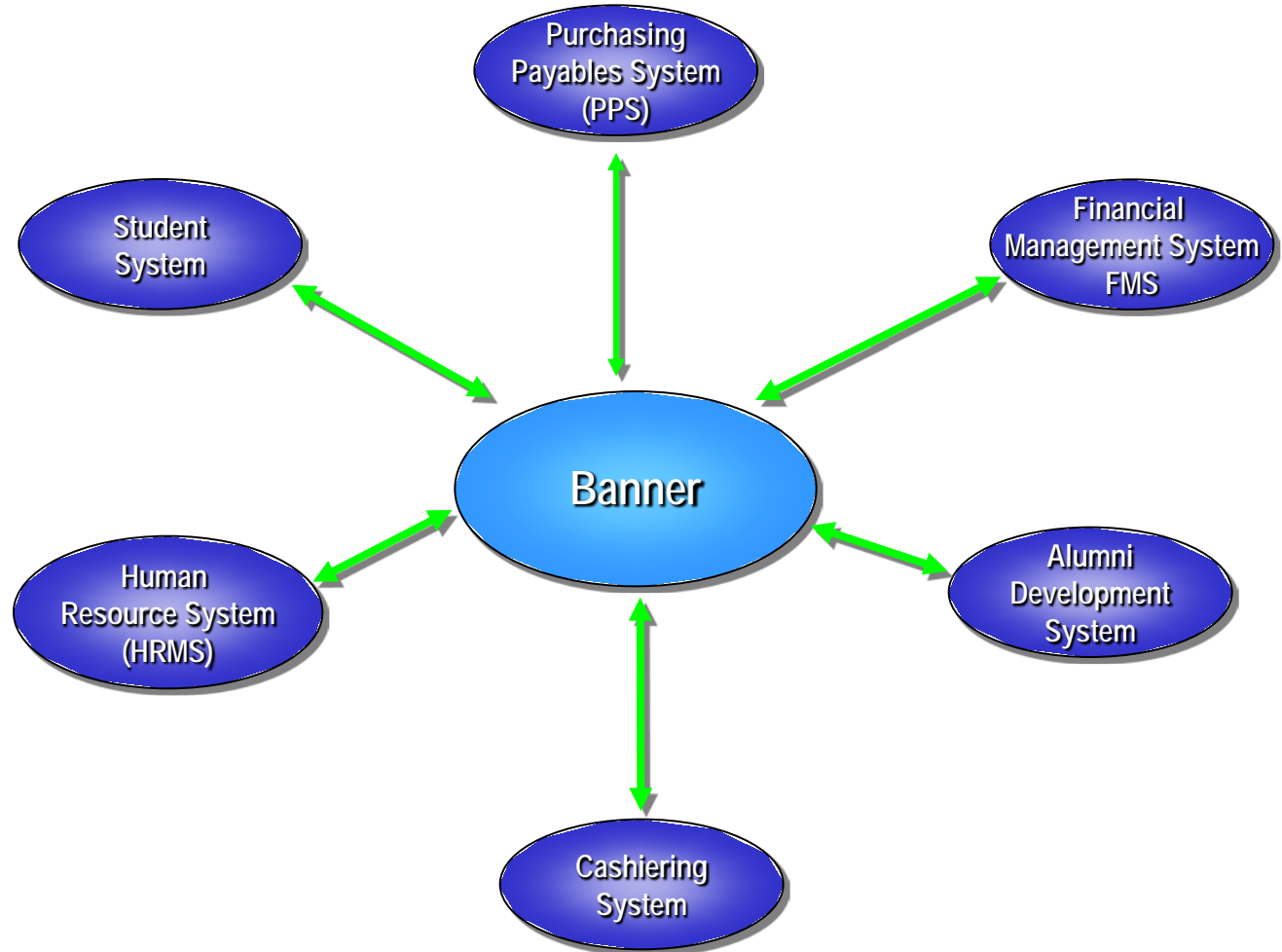
Topic 3: Major Features of Banner

Major Features of Banner

Banner is an online product which utilizes the Oracle Relational Database Management System. At Wayne State University, Banner is integrated with systems such as Student, Alumni/ Development, Financial Management, and Human Resources. This capability enables you to access information that already exists in any of these systems.

Banner includes the following major features:

- **Internet-Based** — Banner 7.x provides many functions which are internet-based. A primary benefit is improved access to the tools you need.
- **User-Friendly Design**—Banner looks and operates like many of the typical "windows" applications you're already using! Menus and the mouse are available to users.

Lesson 2: Getting Started in Banner - Overview & Agenda

Lesson Overview

The Banner interface is designed as a Graphical User Interface (GUI). A GUI uses pictures to represent features and functions of Banner, allowing simple control of the program.

This lesson will introduce you to the basic layout of Banner and the names and functions of key elements of the program interface.

Before you can navigate within Banner, you will need to differentiate between "areas" of the software. Doing so will help you in the lessons that follow – and ultimately ensure your success in using Banner effectively.

Lesson Agenda

Topic 1:   Log On To Banner

Topic 2:   Parts of the Interface

Topic 3:   Forms

Topic 4:   Using the Mouse and Keyboard

Topic 1: Log On To Banner

To begin working in Banner, you must log on to the system.

To do this back at your desk, you will need three things:

1. WSU Access ID

2. * Banner access account and a Banner "profile" which gets you "in the door" to do what you need to do for your job.

3. Compatible browsers:

   ** Internet Explorer

   ** Firefox

* Banner security access forms are located at this website :

   http://computing.wayne.edu

** Latest system requirements are listed at:

   http://computing.wayne.edu/hardware
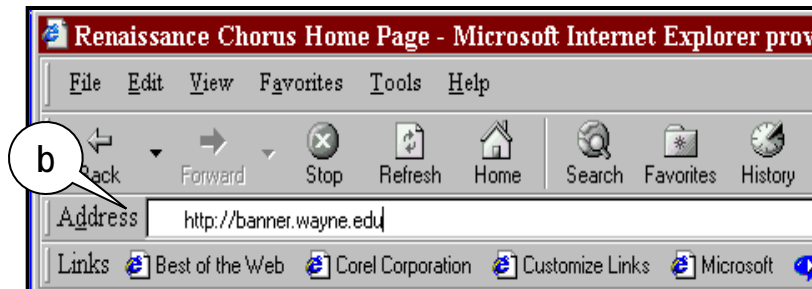
☑ Procedure: Log On To Banner

Procedure:

1) Launch your internet browser.

2) Log on to WSU Pipeline.

3) Click the *Employee* tab.

4) Click the *Banner* link located on the left side portion of the screen.

5) Enter your **user name**.

6) Enter your **password**.

7) Click the **Connect** button. *Banner will open*
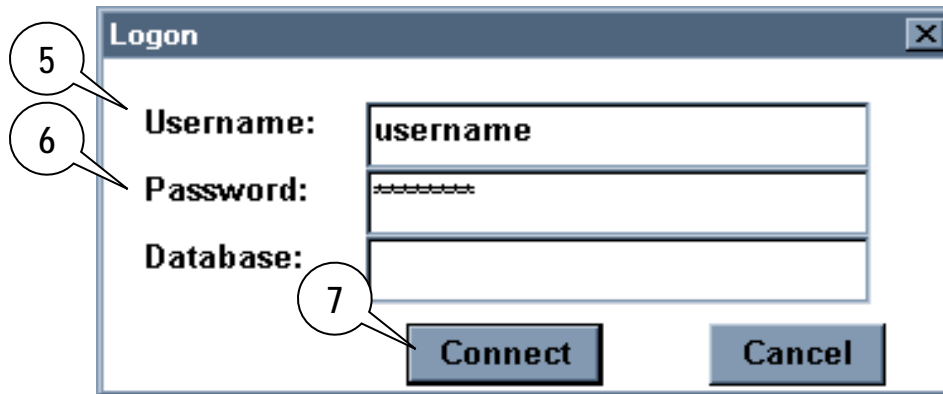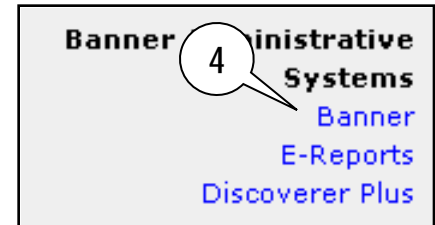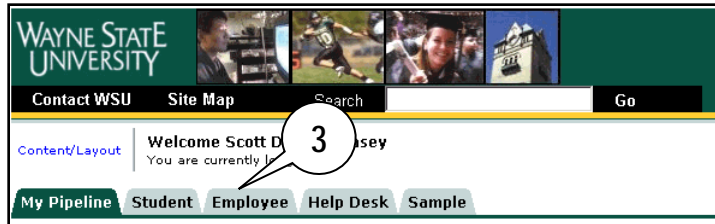
Alternate access to Banner:

a) Launch your internet browser.

b) Enter **banner.wayne.edu** in the address field - click 'go'.

c) Follow steps 5-7 above.

1

WAYNE STATE UNIVERSITY

Contact WSU   Site Map   Search   Go

Content/Layout   Welcome Scott D   sey
You are currently l

My Pipeline   Student   Employee   Help Desk   Sample

3

Launch Internet Explorer Browser

4

Banner   inistrative Systems

Banner
E-Reports
Discoverer Plus

Logon   ✕

5   **Username:**   username

6   **Password:**   *******

Database:

7   **Connect**   **Cancel**

Renaissance Chorus Home Page - Microsoft Internet Explorer prov

File   Edit   View   Favorites   Tools   Help

Back   Forward   Stop   Refresh   Home   Search   Favorites   History

b   Address   http://banner.wayne.edu

Links   Best of the Web   Corel Corporation   Customize Links   Microsoft

Topic 2: Parts of the Interface

This lesson will introduce you to the basic parts of the Banner interface and the names and functions of key elements found on forms:

What you will learn in this topic:

- Menu bar

- Toolbar

- Auto hint

- Status line

Items needed to complete this topic:

- Access to the Banner icon

- User name

- User password
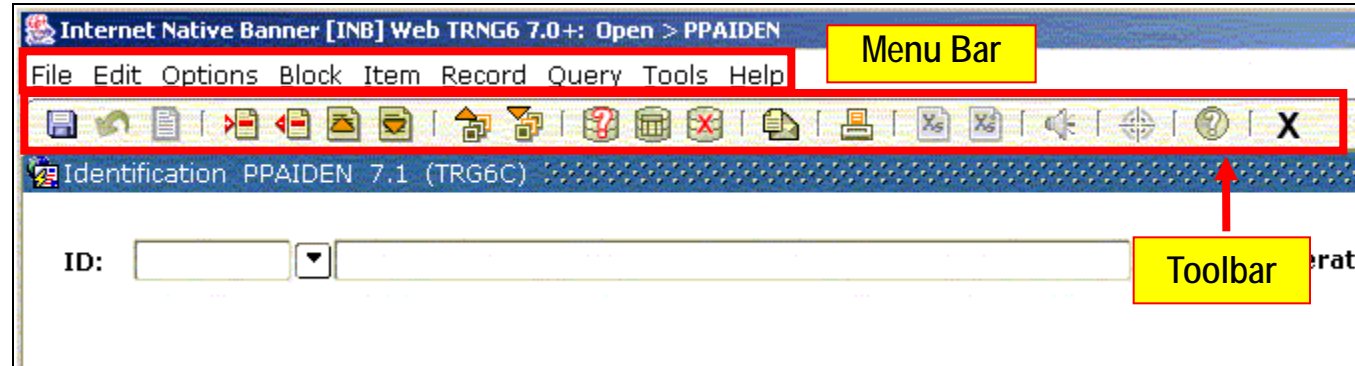
Discussion: Menu Bar & Toolbar

Menu Bar

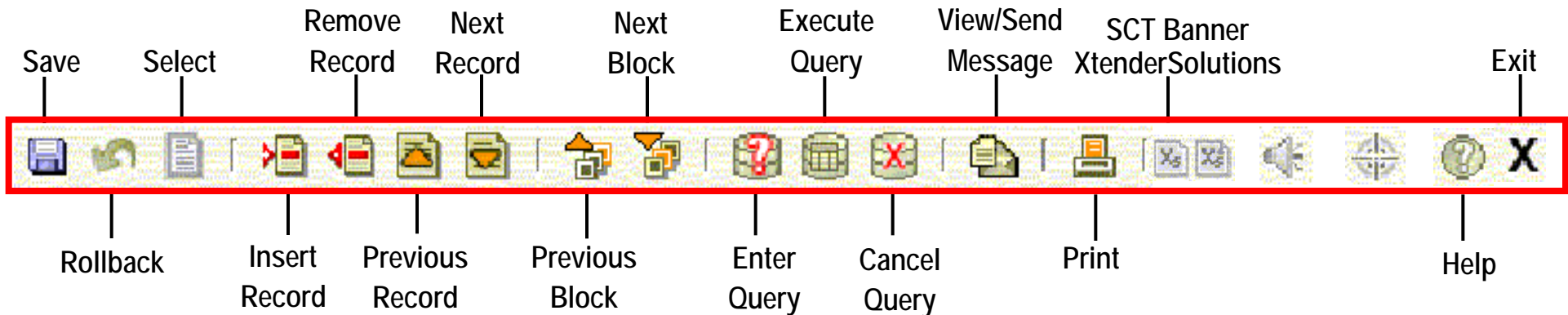The Banner menu bar, located at the top of every form, contains pull-down menus.

Note: If a menu item is dimmed, it is *disabled* and cannot be accessed.

Toolbars

The *toolbar* holds a set of buttons that offer quick access to commonly used Banner functions.

Internet Native Banner [INB] Web TRNG6 7.0+: Open > PPAIDEN

File Edit Options Block Item Record Query Tools Help

Menu Bar

Identification PPAIDEN 7.1 (TRG6C)

ID:

Toolbar

Tool Tips provide the name of the button the mouse cursor points at.

Save | Select | Remove Record | Next Record | Next Block | Execute Query | View/Send Message | SCT Banner XtenderSolutions | Exit

Rollback | Insert Record | Previous Record | Previous Block | Enter Query | Cancel Query | Print | Help
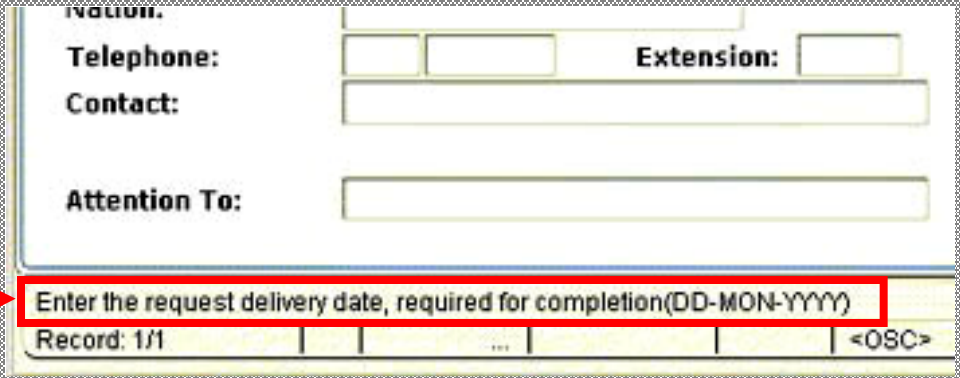
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Discussion: Auto Hint Line

Auto Hint Line

The *auto hint line,* at the bottom of a form window, contains information about the field where the cursor is located:

- Gives KEY information about what you should do

- **Error** and **processing** messages

- Keyboard equivalents, if you can access other blocks, windows, or forms from the field

Auto Hint—field description

Enter the request delivery date, required for completion(DD-MON-YYYY)

Record: 1/1   ...   <OSC>

NOTE: Look at your auto hint line **frequently**. This is the only place where Banner tells you what it can and can not do!

Discussion: Sample Auto Hint Messages and Status Line

Sample Auto Hint Messages
• Query caused no records to be found. Re-enter.
• Mandatory required field.
• Invalid function; press SHOW KEYS for valid functions.
• Enter a name Last, First, Middle and press enter or tab. Use the wildcard % if needed.
• Enter NEXT or leave BLANK for automatic assignment or enter document number.
• Enter document type or choose LIST to view valid options.
• Request is approved – no changes are allowed.
• Press Enter to start selection or expand/collapse menu.

Status Line

The *status line,* beneath the auto hint line, may contain the following messages:
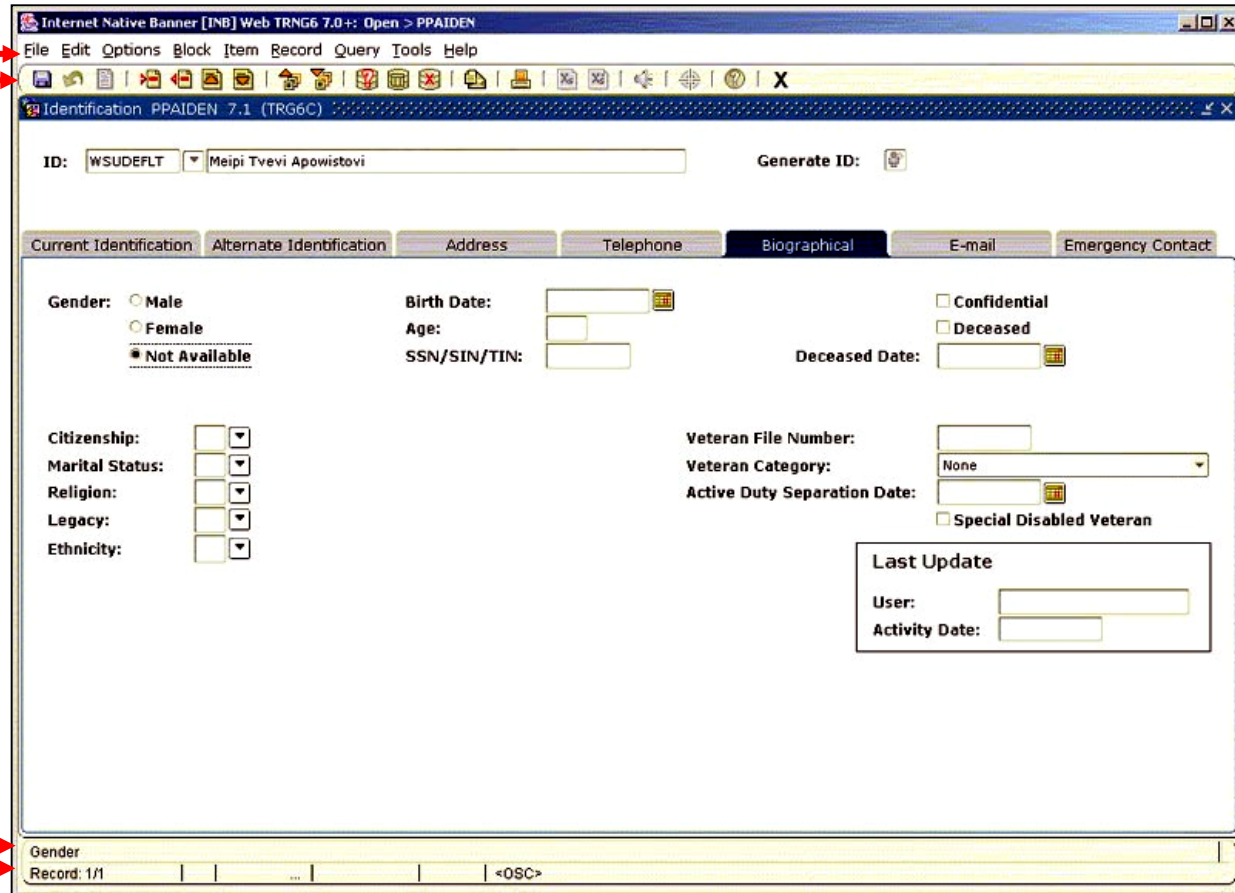
• Record n/n

• Enter query

On Your Own Activity: Parts of the Interface

Identify these parts of the interface by filling in the blanks using the following terms below:

- Status Line

- Menu Bar

- Auto Hint

- Toolbar

1.

2.

3.

4.

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Topic 3: Forms

A form is an online document where you can enter and look up information in Banner. A form visually organizes information so it is easier to enter and read.

A form is made up of fields. Data is entered into fields within Banner A form also has common parts such as a title, window(s), key blocks and data blocks.

 A form in Banner is similar to a paper document except information is only entered once and can then be used by other Banner forms. The more you know and understand the parts of the form, the easier it will be for you to work in Banner.

What you will learn in this topic:

· Key blocks and data blocks

· Fields

· Working with tabs

· The Options menu

Discussion: Layout of a Banner Form

Data is entered into Banner on forms.

Think of these forms as paper documents because they have many of the same features. On a paper document, like an Employee Information form, you have a:
- Title (name of the document)
- Windows (Sections & Blocks)
- Key Blocks (specific document #)
- Fields

Similarly, Banner forms have many of the same design elements:
- Titles
- Windows
- Key Blocks
- Data Blocks
- Fields

Discussion: Key Blocks

The first block on most forms contains **key** information. This *key block* generally identifies the record, which determines what is entered or displayed on the rest of the form. All information on the form refers to the Key block.

The **Key block** has at least one field and many times more. For example, a form that maintains financial information may have Key block fields for both a chart of accounts and a fiscal year.

The Key block typically stays on the form as subsequent blocks appear.

Key block

When the cursor is in the key block, enterable fields in the key block are enabled. These same fields are disabled when the cursor leaves the key block.

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Discussion: Data Blocks

A **Data block** is a section of a form or window that contains information related to the record identified in the key block.

If a form or window contains more than one block, each block will have a yellow border at the top.

Note: To move from the **Key block** to the **Data blocks**, do a Next Block. This action populates the data fields with information that exists.

Data blocks

Discussion: Options Menu

The **OPTIONS** menu contains links that take you to other blocks and windows *within* the current form.

Additional links take you *outside* the current form to other related forms.

The available options change as the cursor location changes within a form.

Discussion: Using Tabs

Some forms provide navigation tabs that allow you to move from one section of a form to another:

- Some navigation tabs allow you to move to different data blocks of the current form at random.

- Some forms do not allow you to advance to another tab until you have completed all required fields in the current data block.

Discussion: Fields

Fields are areas on a form where you can enter, query, change, and display specific information. The following terms describe the status of a field:

- ❑ **Enabled & Enterable**: You can put the cursor in the field and enter information.
- ❑ **Disabled & Display only**: You cannot put the cursor in the field and you cannot enter information. Typically, disabled fields are automatically populated by entries in other fields. This ensures the accuracy of information by preventing spelling and data entry errors.

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☑ On Your Own Activity: Parts of a Form

Identify these form parts by writing the correct name in the blank boxes next to the item using the terms in the column below.

1.

2.

3.

4.

5.

6.

Terms:

A. Fields
B. Options Menu
C. Data Block
D. Key Block
E. Title Bar
F. Navigation Tabs

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Topic 4: Using the Mouse and Keyboard

Like other software applications, you may use many keyboard and mouse shortcuts to navigate within Banner.

What you will learn in this topic:

How to navigate through Banner using keyboard and mouse shortcuts.

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Discussion: Keyboard Shortcut List

You can use **keyboard shortcuts** to *quickly* perform certain Banner functions

Here's a list of most of the keyboard shortcuts available here at WSU.

NOTE #1: Standard Windows shortcuts for copy (ctrl+c), cut (ctrl+x) and paste (ctrl+v) function within Banner.

Keys	Description
Ctrl F1	Display "Show Keys" window
F2 | shift + F2	-- | count query hits
F3 | shift + F3	-- | **SELECT** record
F4 | shift + F4	Record duplicate |
F5 | shift + F5	-- | Clear block
F6 | shift + F6	Insert record | Delete record
*F7 | shift + F7	**Enter** query | **Rollback**
*F8 | shift + F8	**Execute** query | print
F9	**List – Search**
F10	Save changes
*Ctrl + pg ↓	Next block
*Ctrl + pg ↑	Previous block
Ctrl + u	Clear item field
*Tab	Next item field
Shift Tab	Previous item field (reverse direction)
*Ctrl + q	Acts as 'exit' button – cancels a query or exits current form

*Fundamental keystrokes for all users

Discussion: Mouse Shortcut

A useful mouse shortcut involves **right-clicking** on the screen inside a Banner form.

By doing so, a pop-up window appears providing all items from the options menu as well as a number of additional Banner functions such as rollback, save, exit, and print.

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Review: Getting Started in Banner

In this lesson you:

- Learned how to log on to Banner. (Topic 1)

- Identified the parts of the Banner screen. (Topic 2)

- Learned common parts of a form and the typical form layout. (Topic 3)

- Learned how to use the mouse and keyboard to get around. (Topic 4)

Key concepts:

- The keyboard—Banner is inconsistent with the mouse, so we introduced you to keyboard shortcuts.

- Auto-hint line—This is where Banner talks to us.

- Options menu —Illustrates the logical flow of the business process.

Lesson 3: Banner Forms - Overview & Agenda

Lesson Overview

Like other software applications, there are multiple methods and procedures for navigating within Banner to complete a task.

Banner provides you with several ways to find and work with various forms. As you become familiar with Banner, you will be able to move about easily through the screens.

Lesson Agenda

Topic 1: Form Names - what they can tell you about a form's function

Topic 2: How to access Banner forms using

– Go to… field

– Direct Access

– Main Menu

– My Banner

– Last 10 Forms listed in the File menu

Topic 1: Understanding Form Names

Each form in Banner has a 7 character name – this name is an acronym which tells you about the type of information the form contains, the University business process it is related to, and much, much more.

What you will learn in this topic:

How to interpret the 7-character name of a form.

Discussion: Understanding Form Names – Continued

Position 1:
Identifies the **primary system** owning the form.

Position 2:
Identifies the **business process** (module) owning the form.

Position 3:
Identifies the form **type**.

Positions 4-7:
Uniquely **identifies** the form.

P	P	A	IDEN
1	2	3	4-7

Position 1:
- Accounting (T)
- HR/Payroll / Personnel (P)
- Position Control (N)
- Student (S)
- Financial (F)

Position 2:
- General Person (P)
- Application (A)
- Budget (B)
- COBRA (C)
- Benefit/Deductions (D)
- Employee (E)
- Electronic Approvals (R)
- "Overall" to a business process (O)
- General to a business process (G)
- Purchasing (P)

Position 3:
- Application (A)
- Inquiry (I)
- Validation (V)
- Maintenance (M)

Positions 4-7:
Examples:
- Identification (IDEN)
- Position (POSN)
- Encumbrance (ENCB)
- Employee (EMPL)
- Job information (JOBS)
- Requisition (REQN)
- Check (CHEK).

Discussion: Example Form Names

Some examples…

	Example: *FPAREQN*	Example: *SAAADMS*	Example: *POIIDEN*
Position 1: Identifies the **primary system** owning the form	**F** = Finance	**S** = Student	**P** = HR/Payroll/Personnel
Position 2: Identifies the **business process** (module) owning the form	**P** = Purchasing	**A** = Admissions	**O** = Overall to a business process
Position 3: Identifies the **type** of form	**A** = Application	**A** = Application	**I** = Inquiry
Position 4-7: Uniquely **identifies** the form	**REQN** = Requisition	**ADMS** = Admissions	**IDEN** = Employee Search Form (Employee, Applicant, COBRA)

On Your Own Activity: Understanding Form Names

For the Banner form *FGIENCB*, fill in the blanks below, identifying the elements of the form name:

1)   The primary system owning the form
2)   The business process owning the form
3)   The type of form
4)   The unique identification of the form

F = _____

G = _____

I = _____

ENCB = _____

Topic 2: Accessing Banner Forms

Every time you log on to Banner, the "Main Menu" appears. From here, there are five methods by which you can open a specific form.

What you will learn in this topic:

- How to navigate to a specific form using the Go To… field on the Main Menu.

- How to navigate to a specific form using the Direct Access method.

- How to navigate to a specific form using the Main Menu folder hierarchy.

- How to use My Banner.

- How to navigate to a specific form using the Last 10 Forms option.

Discussion: Go To... Field

You can use the *Go To...* field to open a menu or form by typing its seven-character acronym into the field and pressing the *enter* key.

Go To...

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☑ Procedure: Go To... Field

Using Go To... :

With Banner open:

1) Enter the seven-character name of the desired form in the **Go to...** field.

2) Press **Enter**.

The requested form is opened.

Go To...
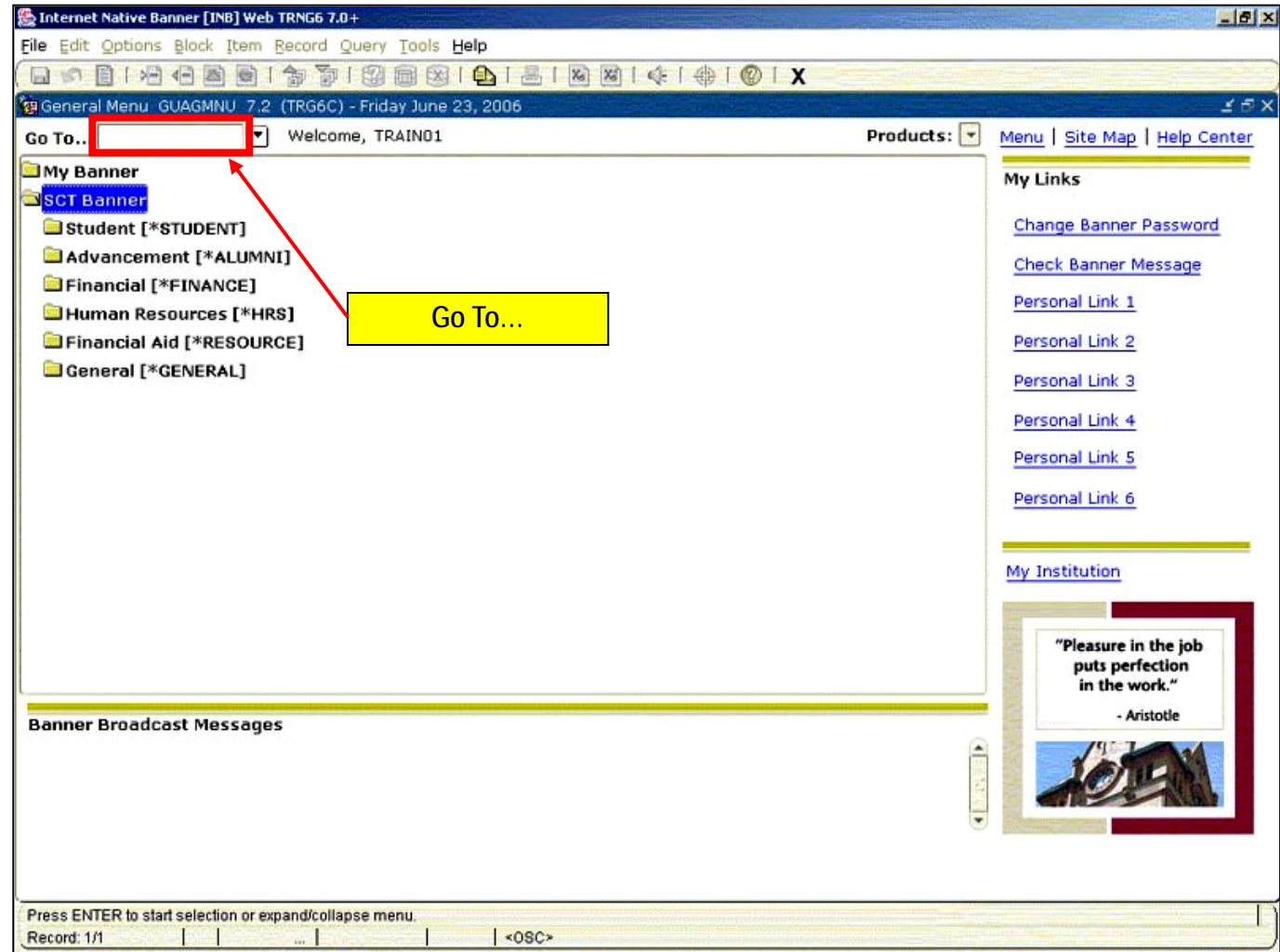
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Discussion: Direct Access

1

You can also use the *Direct Access* method from within a form to open another form without closing the current form.

2

File Edit Options Block Item Record Query Tools Help

Direct Access
Object Search
QuickFlow
Select
Rollback
Save
Refresh
Print
Exit
Exit QuickFlow
Exit SCT Banner
Return to Menu
Preferences

...ch Fo... ...ee, Applicant, COBRA) POIIDEN 7.0 (TRG6C)

Last Name	First Name	Middle Name	Change Indicator	Type	Birth Date

Case Sensitive Query: ● No   ○ Yes

Invoke Direct Access form
Record: 1/1 | | Enter-Qu... | | <OSC>

☑ Procedure: Direct Access

Using Direct Access… :

With a Banner form open:

1) Click FILE on the menu bar

2) Click DIRECT ACCESS

3) Enter the form name

4) Press ENTER.

On Your Own Activity: Go To... and Direct Access

1) Using the **Go To...** field on the main menu, open PPAIDEN. After PPAIDEN opens…

2) From the file menu, use **Direct Access** to open SPAIDEN.

Discussion: Main Menu Access to Forms

You can also navigate to a specific form using the '*main menu.*'

You can expand and collapse menus by double-clicking the folder icons that appear to the left of the name.

If a closed folder icon appears, double-click it to expand the menu. The closed folder icon changes to an open folder icon when the menu contents are visible.

If an open folder icon appears, double-click it to collapse the menu.

File Edit Options Block Item Record Query Tools Help

General Menu GUAGMNU 7.2 (TRG6C) - Monday July 10, 2006

Go To...   Welcome, TRAIN01   Products: Menu | Site Map | Help Center

My Banner

SCT Banner ← **Expanded menu.**

Student [*STUDENT]

Course Catalog [*CATALOG] ← **Currently selected menu (blue)**

Basic Course Information [SCACRSE]
Course Detail Information [SCADETL]
Course Registration Restrictions [SCARRES] ← **7 Character Form Names**
Catalog Prerequisite and Test Score Restrictions [SCAPR...]
Catalog Schedule Restrictions [SCASRES]
Course Base Maintenance [SCABASE] **Sub-menus or forms available from the selected menu**
College and Department Text [SCATEXT]

Class Schedule [*SCHEDULE]
General Person [*PERSON]
Faculty Load [*FACULTY]
Location Management and Housing [*LOCATION]
Recruitment [*RECRUIT]
Admissions [*ADMISSION]
General Student [*GSTUDENT]
Registration [*REGISTRATION]

Banner Broadcast Messages

Press ENTER to start selection or expand/collapse menu.
Record: 1/1 | ... | <OSC>

My Links

Change Banner Password
Check Banner Message
Personal Link 1
Personal Link 2
Personal Link 3
Personal Link 4
Personal Link 5
Personal Link 6

My Institution

"Pleasure in the job puts perfection in the work."
- Aristotle

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☑ Procedure: Main Menu Access to Forms

To Expand a Menu:

1) Double-click the folder icon next to **SCT Banner**.

2) Double-click the folder icon next to **Student**.

3) Double-click the folder icon next to **Course Catalog**.

4) Select the appropriate form you wish to open from the Course Catalog menu.

File Edit Options Block Item Record Query Tools Help

General Menu GUAGMNU 7.2 (TRG6C) - Monday   10, 2006

Go To...   ▼   Welcome, TRA   **1**   Products: ▼   Menu | Site Map | Help Center

📁 My Banner
📁 SCT Banner   **2**
  📁 Student [*STUDENT]
    📁 Course Catalog [*CATALOG]   **3**
      📄 Basic Course Information [SCACRSE]
      📄 Course Detail Information [SCADETL]
      📄 Course Registration Restrictions [SCARRES]   **4**
      📄 Catalog Prerequisite and Test Score Restrictions [SCAPREQ]
      📄 Catalog Schedule Restrictions [SCASRES]
      📄 Course Base Maintenance [SCABASE]
      📄 College and Department Text [SCATEXT]
  📁 Class Schedule [*SCHEDULE]
  📁 General Person [*PERSON]
  📁 Faculty Load [*FACULTY]
  📁 Location Management and Housing [*LOCATION]
  📁 Recruitment [*RECRUIT]
  📁 Admissions [*ADMISSION]
  📁 General Student [*GSTUDENT]
  📁 Registration [*REGISTRATION]

My Links

Change Banner Password
Check Banner Message
Personal Link 1
Personal Link 2
Personal Link 3
Personal Link 4
Personal Link 5
Personal Link 6

My Institution

"Pleasure in the job
puts perfection
in the work."

- Aristotle

Banner Broadcast Messages

Press ENTER to start selection or expand/collapse menu.
Record: 1/1 | | ... | | | <OSC>

☑ Procedure: My Banner

To add a form to My Banner :

1) Right-click your mouse from within the form you want to add to your personal menu.

2) Select **Add to Personal Menu**.

The next time you log in to Banner, the form will appear in the **My Banner** folder when you open it.

File   Edit   Options   Block   Item   Record   Query   Tools   Help

Identification Form PPAIDEN (TRG6C)

ID: 000189786 ▼ Anne G. Sabb   Generate ID:

Rollback
Save
Exit
Print
Add to Personal Menu   **2**

Current Identification
Alternate Names or IDs
Address
Telephone
Biographical
E-mail
Emergency Contact
Application for Positions [PAAAPPL]
List of Applications by Applicant [PAIALST]
Employee Information [PEAEMPL]
Address List [PPIADDR]
E-mail Addresses [GOAEMAL]
Person Search [SOAIDEN]
Non-Person Search [SOACOMP]
Employee Search [POIIDEN]
Person System Identification [GUASYST]
General Information Form [PPAGENL]

Current Identification   Alternate Identifi...   E-mail   Emergency Contact

ID: Name Type: SSN/SIN/TIN:

Person   **ID and Name Source**

Last Name: **Last Update**
First Name:
Middle Name: User:
Prefix: Activity Date:
Suffix: Origin:
Preferred First Name:
Full Legal Name:

Non-Person   **Original Creation**

Name: User:
                                                                   Create Date:

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

Discussion: My Banner

The **My Banner** selection on the main menu gives you the option of creating a personal menu of your most frequently used forms.

From within a form, simply right-click your mouse and select **Add to Personal Menu**.

This simple procedure will place a shortcut to the current form in the **My Banner** folder on the Main Menu.

File   Edit   Options   Block   Item   Record   Query   Tools   Help

General Menu GUAGMNU (TRG6C) - Thursday July 27, 2006

Go To...   ▼   Welcome, TRAIN01   Products: ▼   Menu | Site Map | Help Center

📁 My Banner

📁 SCT Banner

  📁 Student [*STUDENT]
  📁 Advancement [*ALUMNI]
  📁 Financial [*FINANCE]
    📁 General Ledger [*FINGENLL]
    📁 Finance Operations [*FINOPER]
    📁 Stores Inventory [*FINSTORES]
    📁 Purchasing and Procurement [*FINPURCH]
    📁 Accounts Payable [*FINAP]
    📁 Budget and Position Control [*FINBUDG]
    📁 Fixed Asset [*FINASSET]
    📁 Cost Accounting [*FINCOST]
    📁 Endowment Management [*FINENDOW]
    📁 Investment Management [*FININVEST]
    📁 Accounts Receivable [*FINAR]
    📁 Research Accounting [*FINRESEARCH]
    📁 Electronic Data Interchange [*FINEDI]
    📁 Archive [*FINARCH]

My Links

Change Banner Password

Check Banner Message

FPAREQN

FPACHAR

FOAUAPP

FOAAINP

FOMPROF

FOIDOCH

My Institution

"Pleasure in the job puts perfection in the work."
- Aristotle

Banner Broadcast Messages

Press ENTER to start selection or expand/collapse menu.
Record: 1/1   ...   <OSC>

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Discussion: Last 10 Forms Used

You can quickly *re-access* a form that was previously open in the **current** session. The bottom of the 'File' pull-down menu lists the last forms (up to 10) you have used.

- Click the File menu.
- Click the desired form.

File   Edit   Options   Block   Item   Record   Query   Tools   Help

Direct Access
Object Search
QuickFlow
Select
Rollback
Save
Refresh
Print
Exit
Exit QuickFlow
Exit SCT Banner
Return to Menu
Preferences

1. PEI1PAY One-Time Payment Inquiry
2. PEAESCH Employee Status Change
3. PEAEMPL Employee

Invoke Direct Access form
Record: 1/1 | | | ... | | | <OSC>
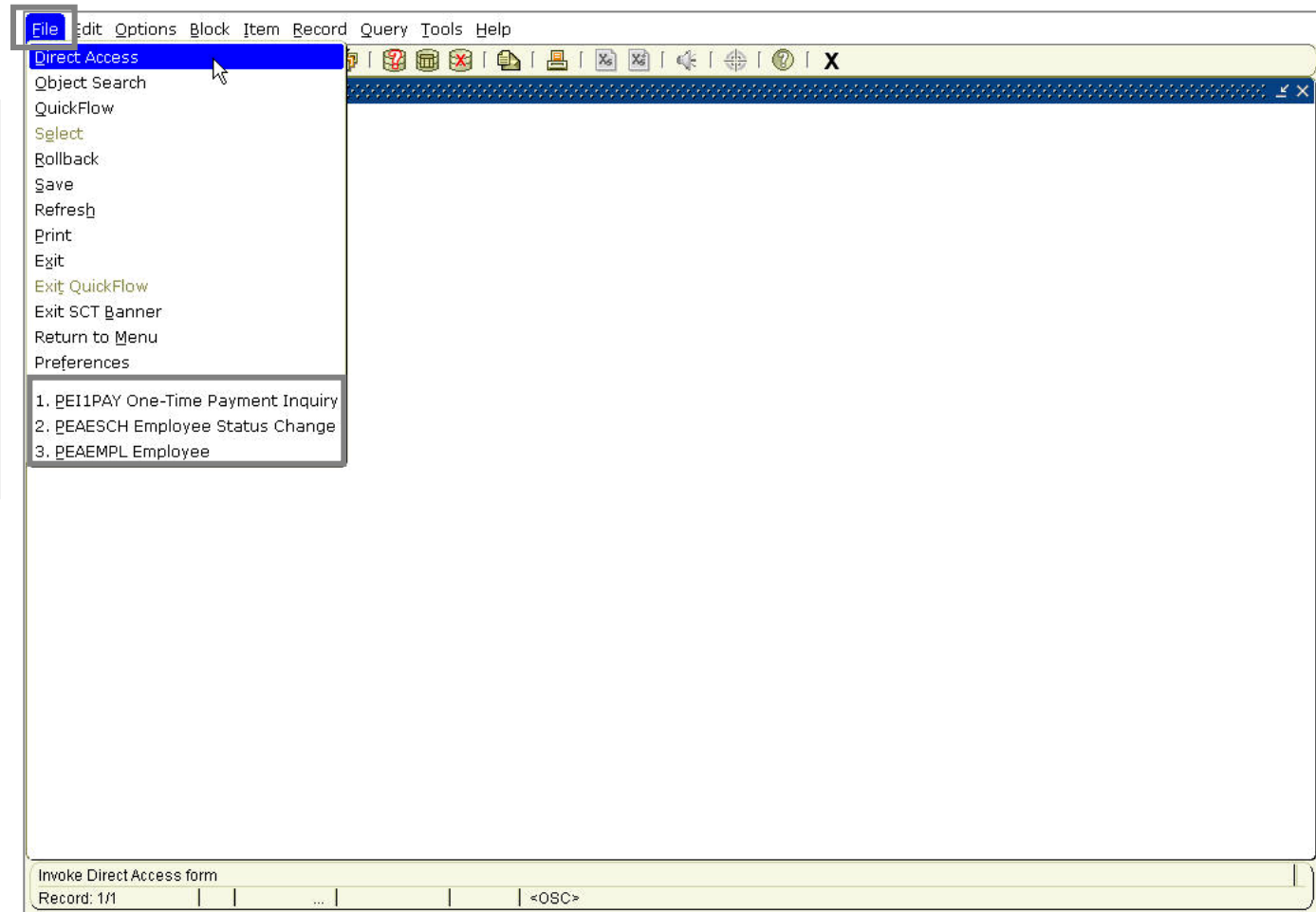
☑ Procedure: Last 10 Forms

Procedure:

From the main menu:

1) Click the **File** menu.

2) Select the **PEAEMPL** form.

PEAEMPL opens

Click Exit to return to the main menu.

File Edit Option ck Item Record Query Tools Help

Direct Access — **1**
Object Search
QuickFlow
Select
Rollback
Save
Refresh
Print
Exit
Exit QuickFlow
Exit SCT Banner
Return to Menu
Preferences

1. PEI1PAY One-Time Payment Inquiry
2. PEAESCH Employee Status Change
3. PEAEMPL Employee — **2**

Invoke Direct Access form
Record: 1/1   ...   <OSC>
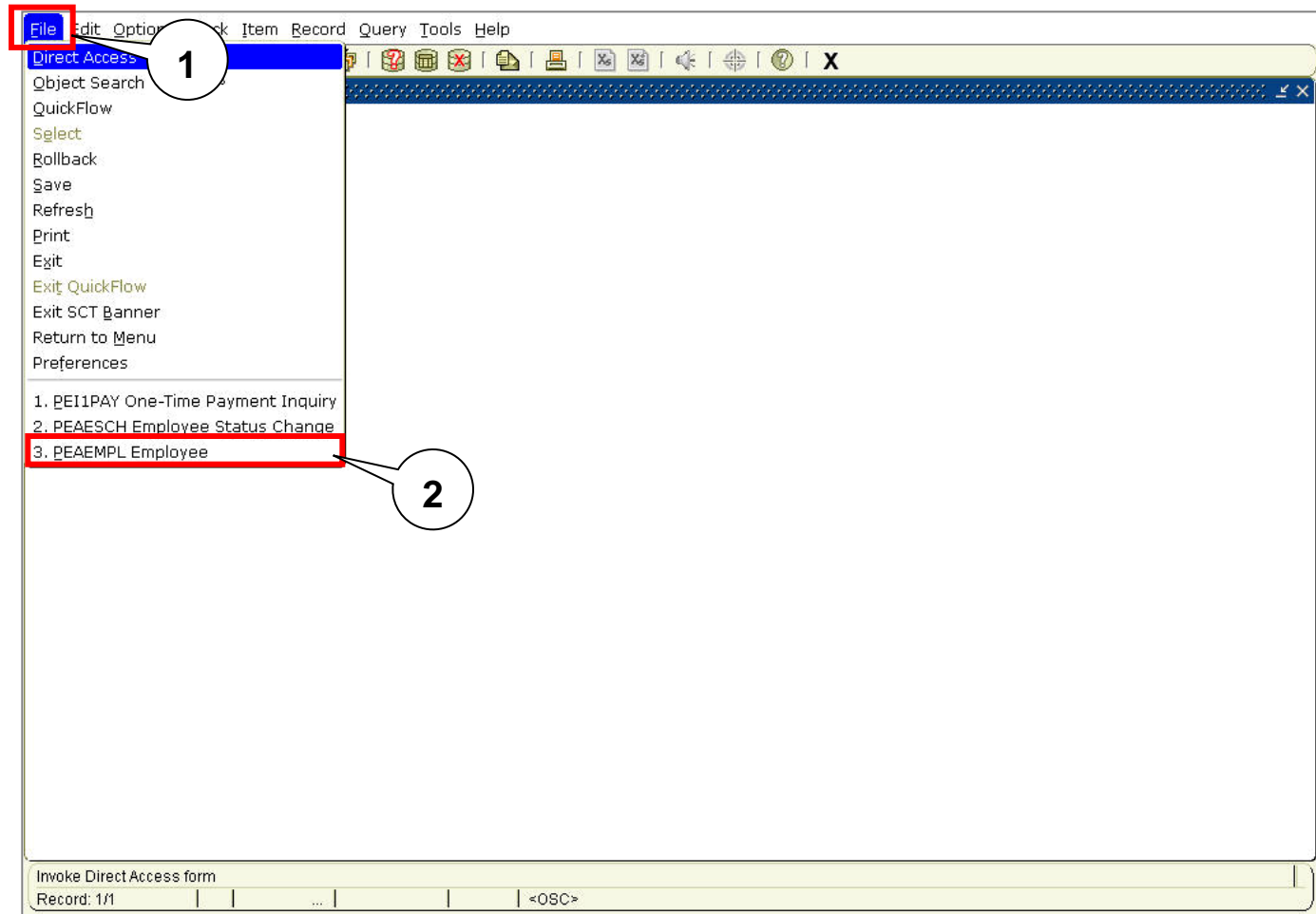
On Your Own Activities: Accessing Banner Forms

Activity 1:

The five ways to access forms in Banner are:
1)
2)
3)
4)
5)

Activity 2:

For this activity, there are two parts:

A) Open Banner and access the identification form SPAIDEN using the folder icons from the main menu. (Hint: Found on the General Person Menu).

After you have successfully opened the form, click exit to return to the main screen.

B) Open the same form from the main menu, but this time use the Go To… field.

After you have successfully opened the form, click exit to return to the main screen.

Review: Banner Forms

In this lesson you:

- Learned about the way Banner form names are constructed, and how to decipher their function. (Topic 1)

- Learned some of the ways to move (or navigate) through Banner and access forms using:

    - **Go to… :**   You can access a menu or form by its seven-character name. (Topic 2)

    - **Direct Access:**   You can access a form by using the code/description lookup feature. (Topic 2)

    - **Main Menu:** You can select from a list of menus and forms in Banner. (Topic 2)

    - **My Banner**: You can create shortcuts to frequently used forms by adding them to your personal menu. (Topic 2)

    - **Last 10 forms in the File pull-down menu:** You can quickly re-access a form that was previously opened in the current session. (Topic 2)

Lesson 4: Performing Inquiries - Overview & Agenda

Lesson Overview

Perhaps one of the most powerful features of Banner is the ability to *search* for information.

Banner allows you to search for information using query functions.

Another way Banner allows you to search is by using forms specifically designed for performing inquiries.

Lesson Agenda

Topic 1:   Query basics, wildcards

Topic 2:   Perform a query using a form field

Topic 3:   Perform a query using an application form

Topic 4:   Perform a query using an inquiry form

Topic 5:   Common forms to Query

Topic 1: Query Basics and Wildcards

Querying is the process of looking to see what information is already entered in the Banner database. You can use inquiry forms, query forms, and most application forms to perform queries.

Some forms automatically open in query mode, usually because a large number of records have been retrieved. When a form opens in query mode, **Enter Query** appears in the status line. You can immediately specify search criteria to narrow the search.

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Discussion: Wildcards In A Search

You can use the *wildcards*, " **%**" and "**_**" in defining the search criteria.

The **%** character represents any number of unspecified characters.

The "**_**" (underscore) character represents a single, unspecified character.

NOTE: With experience, it becomes easier to narrow your queries to get the results you want.

Examples:		
To get these results:	*Enter this criteria:*	*Sample result:*
All entries that begin with "ma"	Ma%	Marianne
All entries that have "ma" as the last two characters	%ma	Comma
All entries that contain "ma" in the name	%ma%	Superman
All entries that begin with "37," that have 3 characters	37_	377
All entries that begin with "s," but have *only* 5 characters	S_ _ _ _	Stern
All entries that have "m" as the second character	_m%	Smith

☑ Procedure: Performing a Query

Here are the basic steps to performing a query in Banner. These most closely illustrate the search process using either *application* or *inquiry* type forms.

1. Access the form to run the search in.

2. If the form opens in query mode (**Enter Query** is in the status line), go directly to step 3. If the form has data in the fields, it is not in query mode. In this situation, click the Enter Query toolbar button   or press the F7 key to clear the content of the form.

3. Enter the search criteria. Remember, the more search criteria you enter, the more specific your search results.

        Note: *Except when dealing with people, capitalization does not matter.*

4. Click the Execute Query toolbar button or press the F8 key. The form then displays all records that match the search criteria.

☑ Procedure: Perform a Query from a Form Field

1. In a form field (i.e. ID, Name, etc), enter the search parameters.

2. Press the **Enter** key.

3. The number of records found (search results) is displayed.

4. Click the down arrow next to the 'Search Results' field to display the matching records.

5. Click the desired record to return it to the form.

☑ Discussion: Performing a Query from a Field (cont.)

Other **options** within the pop-up search results window allows you to add more criteria if needed:

1. Confine the search to person or 'non-person.'

2. Cancel this search and return to the form.

3. Narrow the search by city, state, zip code, birth date, etc.

4. Re-run the query using additional search parameters.

5. The number of records found in the query are displayed.

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On Your Own Activity: Perform a Query from a Form Field

Steps:	Action:
1) *Open PEAEMPL*	Loads the employee information form.
2) Delete any entry in the ID field, then tab to the next field.	Positions cursor in field to be searched on.
3) Type "*grov%*" (w/o quotes) in the field and press Enter to execute the query.	Displays all entries that begin with the characters "grov."
Since the Search Results window contains 90 matches, we will narrow the search again by adding an additional search parameter.	
5) In the zip code field, type *48202* and then *Execute Query* by pressing **F8**.	RE-executes the search, but **only** against the original matches for those who live in this area code. The number of matches appears.
6) Click the down-arrow next to the 'search results' field and select the record for Barbara A. Grover.	A single click will select and return the specific employee record back to the application form (PEAEMPL).
7) *"Next Block"* using the toolbar or Ctrl + Pg Down on the keyboard.	"Populates" the data block fields with the applicable information.

Discussion: Query Using an Application Form

1. Click the search (down arrow) button next to the field to be searched on.

2. The Options List box may appear providing links to other Banner forms that may assist with your query.

3. On the Banner form, enter in the search criteria and execute the query (F8).

4. Double-click in the ID field of the selected record to populate the original form.

Note: If you find a query results in too many matches, you could use the **rollback (shift/F7)** function to re-enter the search parameters adding an additional criteria.

For example, adding some portion of a *first name* to supplement a query based on only *last name* data, would narrow down the results.

Discussion: Query Using an Application Form – cont.

When you select an individual's record and double click on the ID field, you are returning back to the original form when you can then access further information about that person.

Next block to populate the data fields. If additional information is needed, you can click on the navigation tabs or access other forms through the Options menu.

On Your Own: Perform a Query Using an Application Form

Steps:	Action:
1) *Open **SPAPERS*** using the **Go to**… field*.	Loads the General Person form.
2) Click the search (down arrow) key 🔽 next to the ID field.	The Option List dialog box appears
3) From the Option list, select **Person Search**.	Loads the SOAIDEN Person Search form.
4) Click in the last name field and enter "**des_**" (w/o quotes) as the search criteria.	To find records with 4 letters that start with "des".
5) Click *Execute Query* 🔲 on the toolbar, or press F8.	Runs the search.
If you get too many matches here, press F7 to clear the screen and search again. This time, add the first name…	
6) In the last name field, re-enter "**des_**" and then tab to the first name field and enter in "**robert**" and then *Execute Query.*	Reruns the search with the added criteria.
7) Double-click the I.D. for **Robert Isaac Dess**.	**Robert Isaac Dess**' information is returned to the SPAPERS form.
8) *"Next Block"* using the toolbar or Ctrl + Pg Down on the keyboard.	*Next block* causes the data to populate the record fields.

On Your Own: Perform a Query Using an Application Form

Steps:	Action:
*Open form **FTMVEND**.*	The Vendor Maintenance form opens.
1) Click the search button [▼] next to the *Vendor* field.	Loads the FTIIDEN Entity Name/ID Search form.
2) Tab to the last name field and enter "East%" (w/o quotes) as the search criteria.	To find all matching records that start with "East".
3) Press **F8** or click the Execute Query button [icon] on the toolbar	The query is executed and the search results are displayed.
4) Double-click the ID # for Eastman Fire Protection, Inc.	Eastman Fire Protection information is returned to the FMTVEND form.
5) *"Next Block"* using the toolbar or Ctrl + Pg Down on the keyboard.	Next block causes the data to populate the record fields.
6) From the Options menu, select **Vendor Addresses**.	The Address tab opens, displaying the address for Eastman Fire Protection, Inc.

💬 Discussion: Perform a Query Using an Inquiry Form

You can also use an inquiry form to search for information.

1. Launch the inquiry form you will be using and enter the criteria into a field within the form.

2. Execute the query and the results will be displayed on the form.

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On Your Own Activity: Perform a Query Using an Inquiry Form

Steps:	Action:
1) Open *SOISBGI*	Loads source background institution form.
2) Tab to the **Name** field and type **J%**.	To display all institutions that begin with the uppercase letter J.
3) Click the Execute Query icon or press the F8 key.	Executes the query.
4) Ctrl+q to exit the SOISBGI form.	Returns to the main Banner screen.

NOTE: Be sure to enter search criteria with proper *capitalization!*

Topic 5: Common Forms to Query in HMRS

7-Character Form Name	Form Name	Description
PPAIDEN	Identification	▪ Name(s) ▪ Address information ▪ Basic biographic information ▪ Emergency contact information ▪ Drivers license numbers
PPAGENL	General Information	• Inquire about the educational background of an employee.
NBAPOSN	Position Definition	• Inquire on a position's salary range and/or identify where a position reports.
NBAPBUD	Position Budget	• Inquire on position budgets, premium earnings totals, fringe benefits, and position labor distributions.
PEAEMPL	Employee	• Inquire on general data, including current status, employee class, leave and benefit categories, home and distribution organizations, and service dates.
NBAJOBS	Employee Jobs	• Inquire about an employee's job description, start and end dates, status, hours, and salary information.
PPAINTL	International Information	• Inquire on an employee's I9 information.
PHICHEK	Check Detail Inquiry	• Inquire on the details of a specified pay event, including check/Direct Deposit numbers, recipient, gross and net amounts, earnings codes and rates, deductions, and hours worked during the pay period.
PEAFACT	Faculty Action Tracking	Inquire on the following eligibility/status for a specific faculty member: • Eligibility for a sabbatical • Tenure status • Reappointments or leave

Common Forms to Query in Student

7-Character Form Name	Form Name	Description
SOAIDEN	Person Search	This form may be used to determine the correct ID number for a person using the query capabilities of the system. The name, ID number, birth date, and name type are displayed.
TSAAREV	Account Detail	The Account Detail Review Form is used to enter and review charge and payment information about an account. This form presents an online view of each transaction.
SIAIQRY	Faculty/Advisor Query	The purpose of the Faculty/Advisor Query Form is to enable you to select key pieces of information about faculty members or advisors and to list those people who meet the selection criteria.
SAAADMS	Admissions Application	This form is used to identify whether a student has multiple admissions applications.
SOAHSCH	High School Information	This form is used to view information related to a high school student's academic history.
SOISBGI	Source/Background Institution	This form displays information about an institution's type, code, and location.
SHATERM	Term Sequence Course History	This form displays the student's current status and GPA information. Scrolling institutional, transfer, and overall GPA totals are displayed on this form each time the term changes.
SHADEGR	Degree and other Formal Awards	This form is used to review all information pertaining to degrees or other types of awards that the student is seeking, or has been awarded.
SOAHOLD	Holds	This form is used to display holds a person may have.

Common Forms to Query in FMS

7-Character Name	Form Name	Description
FPIREQN	Requisition Inquiry	• Inquire on the details of a completed requisition.
FGIENCD (replaces screen 021)	Detail Encumbrance Activity	• Inquire on a specific encumbrance number posted to the system. • Provides data on all transactions posted against the specific encumbrance.
FGITRND (replaces screen 023 & 27)	Detail Transaction Activity	• Inquire on detail transactions for specific FOAPAL elements. • Inquire by specific fiscal year. • Inquire on specific document information.
FGIJVCD	List of Suspended Journal Vouchers	• Inquire on those JVs that are approved, but are pending in the posting process.
FTMFUND	Fund Code Maintenance	• Inquire on fund effective date; Inquire on fund/grant relationship; Inquire on fund roll-ups.
FTMACCT	Account Code Maintenance	• Inquire on FMS account codes.
FWMACCT	WSU Account Code Crosswalk Maintenance	• Inquire on the new FMS account codes by entering the old FRS object codes.
FGIOENC (replaces screen 021)	Organization Encumbrance List	• Inquire on the open encumbrances for a specific index, organization, and/or fund.
FGITBSR (replaces screen 018)	Trail Balance Summary	• Inquire on general ledger trial balance activity at the summary level. • Inquire by fund and/or account code and fiscal year. • Inquire on fund balance.
FGIBDST Replaces screen 019)	Organization Budget Status Form	• Inquire on budget availability by Org., Fund, Program, Account Code, Account type. • Inquire on adjusted budget, YTD actual expenses incurred, commitments, and available balance. • Inquire on detail transactions for actual YTED activity or by encumbrances. • Inquire by specific fiscal year.
FGIBDSR	Executive Summary Form	• Inquire on budget availabiitly by specific FOAPAL elements at the highest summary level. • Inquire by index and fiscal year; Inquire by detail description.
FOIDOCH	Document History	• Inquire on all aspects of a purchase requisition.

Review: Performing Inquiries

In this lesson you:

- Defined what a query/inquiry is (Topic 1)

- Defined available search 'wildcard' options (Topic 1)

- Performed a query from a form field (Topic 2)

- Performed a query using an application form (Topic 3)

- Performed a query using an inquiry form (Topic 4)

- Reviewed a list of commonly used query forms (Topic 5)

Lesson 5: Understanding FOAPAL - Overview

The FOAPAL string of codes is the core of the Banner Financial Management System (FMS). FOAPAL is the hierarchy coding system FMS uses for classification, budgeting, and recording. It also gives users the ability of reporting and making inquiries at multiple levels.

Virtually every task in FMS will require the use of the FOAPAL string of codes in some form or another. Understanding the concept of FOAPAL is essential for you to work successfully in FMS.

In the next few pages you will learn what role it plays in your dealings with FMS:

What you will learn in this lesson:

Topic 1.   Define and identify FOAPAL string and elements

Topic 2.   Identify Index codes

Lesson 5 : Understanding FOAPAL

Discussion: Definition of FOAPAL

Definition of FOAPAL:

The FOAPAL "string" is used to convey important accounting information specific to a financial transaction or labor costs. This assembly of various accounting codes is established and maintained by WSU Fiscal Operations.

Virtually every task and every form within FMS will require the use of the full FOAPAL string of codes. The use of the FOAPAL string also gives you the ability to report and make inquiries at multiple levels.

Here is an example of a FOAPAL string of codes as used in FMS:

COA	Index	Fund	Orgn	Acct	Prog	Actv	Locn
W ▼	153381 ▼	111560 ▼	25A ▼	72161 ▼	45 ▼	▼	▼

Discussion: FOAPAL string of codes—What does it stand for?

Important WSU Codes:

- **Chart of Accounts (COA)** is a systematic classification of accounts. **WSU uses only one** COA: *W.*
- **Index** is a six character code that serves as a *shortcut* to many of the FOAPAL string combinations.
- **Fund** identifies the source from which the money is being drawn.
- **Organization (Orgn)** identifies the budget unit of the school, college, division, or department that is processing the transaction. Examples: Dean of Libraries, Center for Urban Studies, College of Engineering.
- **Account Code (Acct)** identifies what financial activity is being recorded. Examples: assets, liabilities, fund balance, revenues, expenditures, transfer.
- **Program (Prog)** identifies the purpose of the transaction. Examples: instruction, academic support, research
- **Actv = Activity** is not currently used at WSU.
- **Locn = Location** is used only for plant funds.

Note: To create a FOAPAL, you need two pieces of information, the index code and account code.

COA		F	O	A	P	A	L
COA	Index	Fund	Orgn	Acct	Prog	Actv	Locn
W	153381	111560	25A	72161	45		

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Discussion: Identify Index Codes

The **Index Code** is a six-character code that serves as a shortcut to completing a FOAPAL string.

As you can see from the example below, entering the *153381* code into the index field will populate all FOAPAL element fields **except for the Account Code.**

When using Index Codes, you **must always** provide the FMS Account Code yourself.

Index	F	O	A	P	A	L

COA: W

Index: 153381
Fund: 111560
Orgn: 25A
Acct:
Prog: 45
Actv:
Locn:

Review: Understanding FOAPAL

In this Lesson you learned:

- The definition of FOAPAL and identifying FOAPAL string

- How to identify index codes

Lesson 5: Understanding FOAPAL
Lesson Review

Lesson 6: Features In Banner - Agenda

Lesson Overview

Banner is equipped with many convenient features such as *calendar* and *calculator* functions.

As you become more proficient working with Banner, you'll find these features and others very useful.

Lesson Agenda

Topic 1: Use the Calculator and Calendar

Topic 2: Change your Banner password

Topic 1: Use the Calculator and Calendar

Banner's **Calculator** and **Calendar** functions are conveniently *connected* to related fields within every Banner form. A double-click within a field for either a date or numeric type data will activate the associated calculator or calendar tool.

- If the form's *numeric* field has a value, the calculator starts with that value. You can then use the mouse, number keys on the keyboard, or the numeric keypad (if the Num Lock is enabled) to make calculations.

- If the *date* field has a value, the calendar starts with that date highlighted. If the date field is empty, the calendar highlights the current date.

Discussion: Use The Calculator

If you access the calculator by double-clicking in a numeric form field, clicking the OK button will **return** the calculated value to the 'calling form.'

You can also access the calculator via the Go to… field by entering **GUACALC.** When accessed this way, the calculator works *independently* of any form or field and you *cannot* return a calculated value to a form.
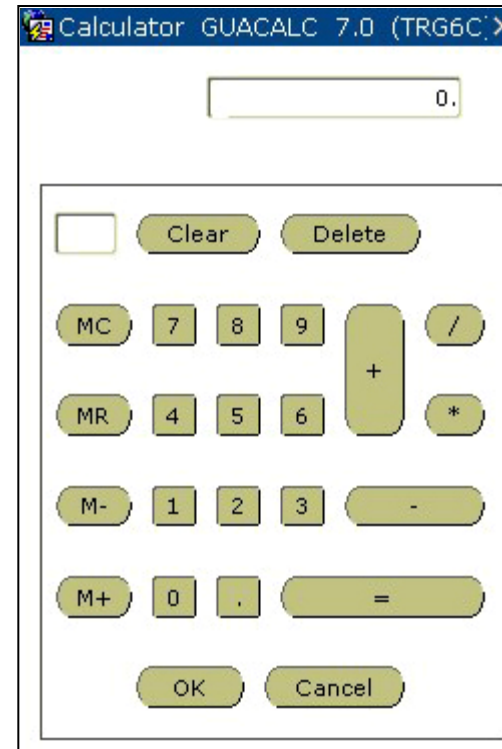
Discussion: Use the Calendar

Accessing the calendar via the calendar icon next to a date field allows you to click the desired date to return that value to the 'calling form.'

You can also access the calendar with the Go to… field by entering **GUACALN**. When accessed this way, the calendar works independently of any form or field. This means you *cannot* select a date and return it to a form.

☑ Procedure: Use the Calendar

Procedure:

In a Banner form:

1. Place the cursor in a From field.
2. Click the calendar icon next to the From field.
3. Select a date.
4. Click OK to populate the date field on the form with the selected date.

Here we've used the **SOAHOLD** form to illustrate these steps.

On Your Own Activity: Use the Calendar

Steps:	Action:
1) Open *SPAIDEN.*	The form opens.
2) Block Next / Ctrl + Pg Down.	Moves cursor to next block, and populates data fields.
3) Click the Addresses *link* on the Options Menu.	Opens the addresses screen.
4) Click the calendar icon next to the "From" field.	The calendar appears.
5) Select a date of your choice.	The date is highlighted. **Note: Clicking the desired date automatically returns that date to the form field.**
6) Click the **OK** button	The date selected returns to the From date field.

Topic 2: Change Banner Password

There are a number of reasons why you might want to change your Banner password, so here's the procedure to use.

NOTE: You can make your Banner (Oracle) password the same as the password you use for WSU e-mail, as long as it does not start with a number.
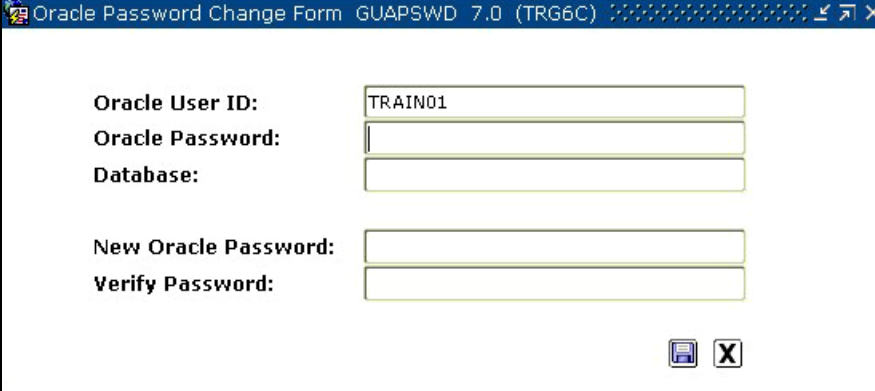
☑ Procedure: Change Banner Password

Procedure:

1) Click **Change Banner Password** under **My Links** on the Main Menu.

2) The Oracle Password Change Form appears. Here, type your current password in the "Oracle password" field.

3) Type a *NEW password in the "New Oracle Password" field*.

4) Tab to "verify password" field and re-type your new password.

5) Click Save 💾 or press the enter/return key.

*NOTE: Do NOT start your new password with a number or special character! If you do, the system will not respond and will not even display an *error* message.

Review: Features in Banner

In this lesson you learned how to do the following:

· Use the calculator function of Banner (Topic 1)

· Use the calendar function of Banner (Topic 1)

· Change your Banner user password (Topic 2)

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Appendix – Session Key Points

We have compiled some of the key information from this session for
quick reference:

- Toolbar buttons reference chart

- Keyboard Shortcuts chart

- Form name basics

- Most commonly used *inquiry* forms

Topic 1: Parts of the Interface
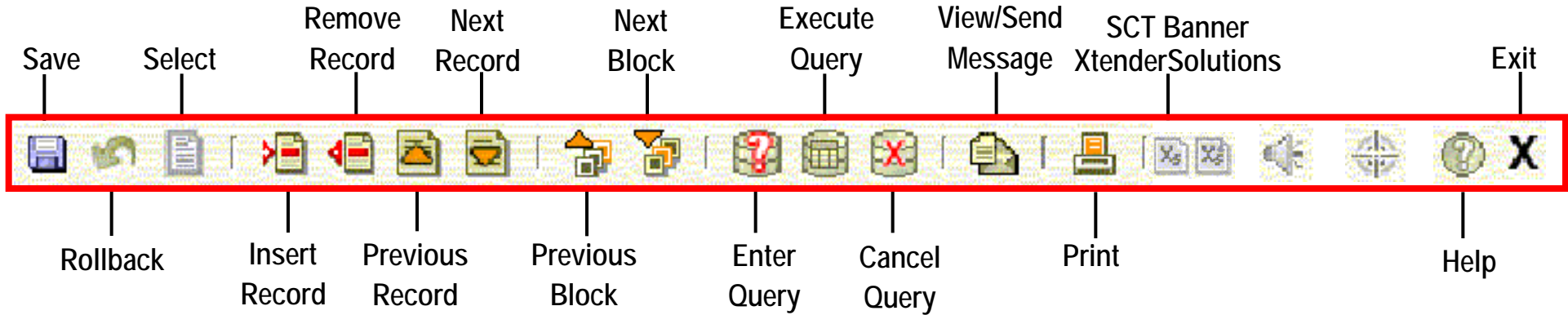
Tool Tips provide the name of the button the mouse cursor is pointing at.

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Topic 2: Keyboard Shortcuts

Keys	Description
Ctrl F1	Display "Show Keys" window
F2 | shift + F2	-- | count query hits
F3 | shift + F3	-- | **SELECT** record
F4 | shift + F4	Record duplicate |
F5 | shift + F5	-- | Clear block
F6 | shift + F6	Insert record | Delete record
*F7 | shift + F7	**Enter** query | **Rollback**
*F8 | shift + F8	**Execute** query | print
F9	**List – Search**
F10	Save changes
*Ctrl + pg ↓	Next block
*Ctrl + pg ↑	Previous block
Ctrl + u	Clear item field
*Tab	Next item field
Shift Tab	Previous item field (reverse direction)
Ctrl + q	Acts as 'exit' button – cancels a query or exits current form

Here's a collection of some of the most useful keyboard shortcuts.

NOTE: *Data entry* users will make good use of these "permission-based" shortcuts:

- F4 Duplicate record
- F6 Insert record
- Shift/F6 Delete record
- F10 Save record

Topic 3: Understanding Form Names

Position 1:
Identifies the **primary system** owning the form

Position 2:
Identifies the **business process** (module) owning the form

Position 3:
Identifies the form **type**

Position 4-7:
Uniquely **identifies** the form

P	P	A	IDEN
1	2	3	4-7

1
- Accounting (T)
- HR/Payroll / Personnel (P)
- Position Control (N)
- Student (S)
- Financial (F)

2
- General Person (P)
- Application (A)
- Budget (B)
- COBRA (C)
- Benefit/Deductions (D)
- Employee (E)
- Electronic Approvals (R)
- "Overall" to a business process (O)
- General to a business process (G)
- Purchasing (P)

3
- Application (A)
- Inquiry (I)
- Validation (V)
- Maintenance (M)

4-7
- Identification (IDEN)
- Position (POSN)
- Encumbrance (ENCB)
- Employee (EMPL)
- Job information (JOBS)
- Requisition (REQN)
- Check (CHEK).

Topic 4: Common Forms to Query in HRMS

7-Character Form Name	Form Name	Description
PPAIDEN	Identification	▪ Name(s) ▪ Address information ▪ Basic biographic information ▪ Emergency contact information ▪ Drivers license numbers
PPAGENL	General Information	• Inquire about the educational background of an employee
NBAPOSN	Position Definition	• Inquire on a position's salary range and/or identify where a position reports
NBAPBUD	Position Budget	• Inquire on position budgets, premium earnings totals, fringe benefits, and position labor distributions.
PEAEMPL	Employee	• Inquire on general data, including current status, employee class, leave and benefit categories, home and distribution organizations, and service dates.
NBAJOBS	Employee Jobs	• Inquire about an employee's job description, start and end dates, status, hours, and salary information.
PPAINTL	International Information	• Inquire on an employee's I9 information
PEAFACT	Faculty Action Tracking	Inquire on the following eligibility/status for a specific faculty member: • Eligibility for a sabbatical • Tenure status • Reappointments or leave

Topic 4: Common Forms to Query in Student

7-Character Form Name	Form Name	Description
SOAIDEN	Person Search	This form may be used to determine the correct ID number for a person using the query capabilities of the system. The name, ID number, birth date, and name type are displayed.
TSAAREV	Account Detail	The Account Detail Review Form is used to enter and review charge and payment information about an account. This form presents an online view of each transaction.
SIAIQRY	Faculty/Advisor Query	The purpose of the Faculty/Advisor Query Form is to enable you to select key pieces of information about faculty members or advisors and to list those people who meet the selection criteria.
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SOAHSCH	High School Information	This form is used to view information related to a high school student's academic history.
SOISBGI	Source/Background Institution	This form displays information about an institution's type, code, and location.
SHATERM	Term Sequence Course History	This form displays the student's current status and GPA information. Scrolling institutional, transfer, and overall GPA totals are displayed on this form each time the term changes.
SHADEGR	Degree and other Formal Awards	This form is used to review all information pertaining to degrees or other types of awards that the student is seeking, or has been awarded.
SOAHOLD	Holds	This form is used to display holds a person may have.

Topic 4: Common Forms to Query in FMS

7-Character Name	Form Name	Description
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FGIENCD (replaces screen 021)	Detail Encumbrance Activity	• Inquire on a specific encumbrance number posted to the system • Provides data on all transactions posted against the specific encumbrance
FGITRND (replaces screen 023 & 27)	Detail Transaction Activity	• Inquire on detail transactions for specific FOAPAL elements • Inquire by specific fiscal year • Inquire on specific document information
FGIJVCD	List of Suspended Journal Vouchers	• Inquire on those JVs that are approved, but are pending in the posting process
FTMFUND	Fund Code Maintenance	• Inquire on fund effective date; Inquire on fund/grant relationship; Inquire on fund roll-ups
FTMACCT	Account Code Maintenance	• Inquire on FMS account codes
FWMACCT	WSU Account Code Crosswalk Maintenance	• Inquire on the new FMS account codes by entering the old FRS object codes
FGIOENC (replaces screen 021)	Organization Encumbrance List	• Inquire on the open encumbrances for a specific index, organization, and/or fund
FGITBSR (replaces screen 018)	Trail Balance Summary	• Inquire on general ledger trial balance activity at the summary level • Inquire by fund and/or account code and fiscal year • Inquire on fund balance
FGIBDST Replaces screen 019)	Organization Budget Status Form	• Inquire on budget availability by Org., Fund, Program, Account Code, Account type. • Inquire on adjusted budget, YTD actual expenses incurred, commitments, and available balance. • Inquire on detail transactions for actual YTED activity or by encumbrances. • Inquire by specific fiscal year.
FGIBDSR	Executive Summary Form	• Inquire on budget availabiitly by specific FOAPAL elements at the highest summary level. • Inquire by index and fiscal year; Inquire by detail description
FOIDOCH	Document History	• Inquire on all aspects of a purchase requisition.

Congratulations!

You should now be able to perform the following:
- Navigate in Banner
- Execute basic Banner inquiries

With these skills you will be able to use Banner efficiently and effectively. While these skills are fresh in your memory, be sure to apply them as soon as possible when back at your computer.

We have created a training version of Banner which will allow you to use these skills right away. This training version is Banner V7.x Sandbox as found at:

http://bantest.wayne.edu

Feel free to perform whatever functions you wish in this training version. You cannot harm any data while working in the "sandbox," so jump in!

Thank you for all your effort and time!

Reminder!
Sandbox username = **train01 or train99**
Sandbox password = **Change**