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.

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

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

Banner Navigation - Session Agenda

Lesson 1: Introduction to Banner

Topic 1: The Function of Banner

Topic 2: Systems Interfacing with Banner

Topic 3: Major Features of Banner

Lesson 2: Getting Started in Banner

Topic 1: Log On to BannerTopic 2: Parts of the InterfaceTopic 3: FormsTopic 4: Keyboard Shortcuts

Lesson 3: Banner Forms

Topic 1: Types of Banner Forms Topic 2: Understanding Form Names Topic 3: Accessing Forms

Lesson 4: Performing Inquiries

Topic 1: Querying and Using WildcardsTopic 2: Performing a Query Using a Form FieldTopic 3: Performing a Query Using an Application FormTopic 4: Performing a Query Using an Inquiry FormTopic 5: Commonly Used Forms to Query

Lesson 5: Defining and Understanding FOAPAL <u>Topic 1: Define and Identify FOAPAL String and Elements</u> <u>Topic 2: Identify Index Codes</u>

Lesson 6: Features In Banner

Topic 1: Using the CalculatorTopic 2: Using the CalendarTopic 3: Changing the Banner Password

Appendix : Session Key Points

Topic 1: Toolbar ButtonsTopic 2: Keyboard ShortcutsTopic 3: Form NamesTopic 4: Common Inquiry Forms

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.

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.

(Return to Table of Contents)

Lesson 1: Introduction to Banner Topic 1: The Function of Banner

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.



(Return to Table of Contents)

Lesson 1: Introduction to Banner Topic 2: Systems Interfacing with Banner

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

e

Launch Intern<u>et</u>

Explorer

Browser

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.

Lesson 2: Getting Started in Banner Topic 1: Log On To Banner

(Return to Table of Contents)

Page: 11







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

	Totornat Native Papper [INP] Web TONCE 7.0 1, Once & DOATOEN	
Menu Bar	The Felt Ontions Diade These Decend Over Tests Hale	Menu Bar
The Banner menu bar, located at the top of every form, contains pull-down menus.	File Edit Options Block Item Record Ouery Tools Help Image: Second Contraction Imag	I 🛃 📓 I 🌾 I 🛞 I 🖉 I 🗶
Note: If a menu item is dimmed, it is <i>disabled</i> and cannot be accessed.		Toolbar
Toolbars		
The <i>toolbar</i> holds a set of buttons that offer quick access to commonly used Banner functions.	Tool Tips provide the name of the button the mouse cursor points at.	
Domovo	Next Execute View/Send	
Remove N	ext Next Execute View/Serid SCT	[Banner
Save Select Record Re	cord Block Query Message Xtende	erSolutions EXIT
	🖻 🎓 🥻 🚱 📾 🔀 💁 📇	🕺 🐝 🔅 🔞 X
Rollback Insert Previous	Previous Enter Cancel Print	Help
Record Record	Block Query Query	·
(Return to Table of Contents)		

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

	Telephone:		Extension:	
	Attention To:			
Auto Hint—field	Enter the request delivery date	e, required for complet	ion(DD-MON-YYYY)	
description	Record: 1/1		•	OSC>
NOTE				

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

(Return to Table of Contents)

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

(Return to Table of Contents)

On Your Own Activity: Parts of the Interface

Identify these parts of the interface by filling in the blanks using the following terms below:	1. 2.	Internet Native Banner [INB] Web TRNG6 7.0+: Ope File Edit Options Block Item Record Query Image: State S	en > PPAIDEN Tools Help		X
Status LineMenu Bar		Current Identification Alternate Identification Gender: Male Female Not Available	Address Telephone	Biographical E-mail Emerge Confidential Deceased Deceased Date:	iency Contact
Auto HintToolbar		Citizenship: Marital Status: Religion: Legacy: Ethnicity:	Veter Veter Active	an File Number: an Category: None e Duty Separation Date: Special Disabled Ve Last Update User: Activity Date:	teran
	3.	Gender Record: 1/1	<0SC>		l)

(Return to Table of Contents)

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

Identification PPAIDEN 7.1 (TRG6C) 3003000000000000000000000000000000000	
ID: Ge	nerate ID: 🔮
Current Identification Alternate Identification Address Telephone Bio	ographical Data blocks Cont
ID: Name Type: SSN/SI	
Person Last Name: First Name: Middle Name: Prefix: Suffix: Preferred First Name: Full Legal Name:	ID and Name Source Last Update User: Activity Date: Origin:
Non-Person Name:	Original Creation User: Create Date:

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.

Sinternet Native Banner [INB] Web TRNG6 7.0+: Open > PPAIDEN	× 01
Eile Edit Options Block Item Record Query Tools Help	
🌔 🖬 🖉 📑 I 🍋 🗲 🖻 I 🎓 🖥 I 🔀 📾 😣 I 💁 I 😣 📓 I 🌾 I 🌐 I	1 🔞 1 🗙
🙀 Identification PPAIDEN 7.1 (TRG6C) 000000000000000000000000000000000000	$\cdots \cdots $
	Generate ID: 🔮
Current Identification Alternate Identification Address Telephone	Biographical E-mail Emergency Contact
ID: Name Type: 🔽	SSN/SIN/TIN:
Person Key block	ID and Name Source
First Name:	
Middle Name:	User:
Prefix:	Activity Date:
Suffix:	Origin:
Preferred First Name:	
Full Legal Name:	
	Original Creation
Non Demon	
	User:
Namos	Create Date:
Name; Enter a name Last, First, Middle and press enter or tab. Use the wildcard "%" if needed.	
Record: 1/1 <0SC>	

(Return to Table of Contents)

Lesson 2: Getting Started in Banner Topic 3: Forms 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.

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.

SInternet Native Banner [INB] Web TRNG6 7.0+: Open > PPAIDEN	
Eile Edit Options Block Item Record Query Tools Help	
(🖬 🖉 🖺 🛏 🛤 🔂 🕯 🛜 🕼 🎯 🕲 🛍 🖳 🛯 🔛 🛯 🌾 🛭 🔅) [(1)] (1)
ig Identification PPAIDEN 7.1 (TRG6C) 20202020202020202020202020202020202020	$coccesses coccess coccess coccess coccess coccess coccess {f z}$
ID:	Generate ID: 💣
Current Identification Alternate Identification Address Telephone	Biographical Data blocks Contact
ID: Name Type: 🔍	SSN/SIN/TIN:
Person Last Name: First Name: Middle Name: Prefix: Suffix: Preferred First Name: Full Legal Name:	ID and Name Source Last Update User: Activity Date: Origin: Original Creation
Non-Person Name:	User: Create Date:
Name; Enter a name Last, First, Middle and press enter or tab. Use the wildcard "%" if needed. Record: 1/1 <0SC>	

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.

tive Banner [INB] web TRNG6 7.0+: Upen >P	PAIDEN	and the second second				
otions Block Item Record Query Tool:	s Help					
urrent Identification ternate Names or IDs	👂 i 🚯 i 📇 i 🐱	፼ � � (⊘∣ X			0000000000000 <u>-</u> 1
ldress elephone ographical mail mergency Contact			Generate	ID:		
oplication for Positions [PAAAPPL]	Address	Telephone	Biographi	cal E-	-mail	Emergency Contact
st of Applications by Applicant (PAIALST) nployee Information (PEAEMPL) Idress List (PPIADDR)	as	S	SN/SIN/TIN:			
Hall Addresses [GUAEMAL] Hadresses [GUAEMAL] Harson Search [SOAIDEN] Harson Search [SOACOMP] Harson System Identification [GUASYST] Heneral Information Form [PPAGENL] HITTINAME: Name:				ID and Name Last Update User: T Activity Date: 2 Origin: P	RAIN01 1-JUN-2006 PAIDEN	
'SON Meipi Tvevi Apowistovi				Original Crea User: [Create Date: [ition]
	Lions Block Item Becord Query Tool urrent Identification temate Names or IDs Idress lephone bgraphical mail nergency Contact uplication for Positions (PAAAPPL) st of Applications by Applicant (PAIALST) nployee Information (PEAEMPL) idress List (PPIADDR) mail Addresses (GOAEMAL) rson Search (SOACOMP) nployee Search (POIIDEN) arreal Information Form (PPAGENL) First Name: Name:	Lions Block Item Becord Query Tools Help arrent Identification Image: Tools Image: Tools irrent	Lions Block Item Becord Query Tools Help urrent Identification Image: Image	Lions Block Item Becord Query Tools urrent Identification ternate Names or IDs Idress lephone ographical mail nergency Contact oplication for Positions [PAAAPPL] st of Applications by Applicant (PAIALST) nployee Information [PEAEMPL] idresss List [PPIADDR] mail Addresses [GOAEMAL] arrson Search [SOAIDEN] nployee Search [POIIDEN] arrson System Identification [GUASYST] eneral Information Form [PPAGENL]	Nons Block Item Becord Query Tools Help arrent Identification semate Names or IDs Idress lephone ographical mail nergency Contact pplication for Positions [PAAAPPL] st of Applications by Applicant [PAIALST] polyee Information [PEAEMPL] tdress List [PIADDR] mail Addresses [GOAEMAL] rson Search [SOAIDEN] pnolyee Search [POIIDEN] arson System Identification [GUASYST] pnolyee Search [POIIDEN] rson Search Information Form [PPAGENL]	Note Block Item Record Query Tools Help arrent Identification arrent Names or IDs Idress lephone ographical mail nergency Contact piplication for Positions [PAAAPPL] st of Applications by Applicant [PAIALST] as SSN/SIN/TIN: ID and Name Source Last Update User: TRAIN01 Activity Date: [21-3UN-2006 Original Creation User: Son Weipi Tvevi Apowistovi

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.

Internet Native Banner [INB] Web TRNG6 7.0+: Open > PPAIDEN	
Eile Edit Options Block Item Record Query Tools Help	
(🖶 🖉 🖹 I 🖊 🖶 🖪 🗟 I 🎓 🍞 I 🎯 📾 😢 I 💁 🖪 I 🏝 🖬 I 🌾 I 🏶 I 🕼 I	X)
2 Identification PPAIDEN 7.1 (TRG6C) 000000000000000000000000000000000000	
ID: G	enerate ID: Tabs
ID: Name Type: 💌 SSN/S	
Person	ID and Name Source
Last Name: First Name: Middle Name: Prefix: Suffix: Preferred First Name: Full Legal Name:	Last Update User: Activity Date: Origin: Origin:
Non-Person Name:	User: Create Date:
Name; Enter a name Last, First, Middle and press enter or tab. Use the wildcard "%" if needed. Record: 1/1	

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.

lie Edit Options Block [tem Record Query Tools Help Image: Street Line 2: Ship To: Disabled Fields Street Line 2: Street Line 3: Buildins: Letor: Letor: Letor: Street Line 3: Buildins: Letor: Letor: Letor: Street Line 3: Buildins: Letor: Letor: Letor: Letor: Letor: Letor: Letor: Leto: Street Line 3: Leto: Leto: Leto: Leto: Leto: Leto: Leto: Leto: Leto: Leto: <tr< th=""><th></th></tr<>	
Requisition: MEXT Order Date: Disolut-2006 Transaction Date: Disologier State University Commodity Total: Disologier State University Requestor/Delivery Information Vendor Infor Requestor/Delivery Information Vendor Infor Requestor: Susan Deigh/Or Descrittance Administration Fax: Sing To: Disologier State University Street Line 1: CENTRAL RECEIVING - SCOTT HALL Street Line 2: S40 E. CANFIELD Street Line 3: Building: Defroit Zip or Postal Code: #8201 Nation: United States of America Telephone: CENTRAL RECEIVING - SCOTT HALL Street Line 3: Building: CENTRAL RECEIVING - SCOTT HALL Street Line 3: State or Province: MI Zip or Postal Code: #8201 Nation: United States of America Telephone: CENTRAL RECEIVING - SCOTT HALL	
Requisition Entry: Requestor/Delivery Information FPAREQN (TRGC) Requisition: NEXT Order Date: 9:JUL 2006 Delivery Date: 09:AUG-2006 Commodity Total: 12,014.05 Accounting Total: 12,014.05 Requestor/Delivery Information Vendor Infor Enabled Fields accounting Balancing/Completion Pocument Level Accounting Requestor: Susan Deigh/Dr. Januar Rildare Organization: 12C1 Biologicer Sectors Email: Ship To: 01 Street Line 1: CENTRAL RECEIVING - SCOTT HALL Street Line 2: 540 E. CANFIELD Street Line 3: Building: Building: Clorer City: DETROIT State or Province: MI Zip or Postal Code: 48201 Nation: United States of America Centract: CENTRAL RECEIVING - SCOTT HALL	
Requisition: NEXT Order Date: 09-AUG-2006 □ Delivery Date: 09-AUG-2006 □ Commodity Total: 12,014.05 Commodity Total: 12,014.05 Commodity Total: 12,014.05 Requestor: Commodity Total: Correct Line 1: Storegt Line 3: Street Line 1: CENTRAL RECEIVING - SCOTT HALL City: ETROIT State or Province: MI zip or Postal Code: Mailing: Line 3: Building: Cip or Postal Code: Contact: Central RECEIVING - SCOTT HALL	99996 - L
Requisition: NEXT Order Date: 1000-2006 Delivery Date: 109-AUG-2006 Comments: 12,014.05 Accounting Total: 12,014.05 Requestor: Susan Deigh/Dr: 12C1 Biologue Server Street Line 1: CENTRAL RECEIVING - SCOTT HALL Disabled Fields Street Line 3: Building: City: DETROIT State or Province: MI Zip or Postal Code: 48201 Nation: United States of America	
Order Date: 13-JUL-2006 In Suspense Delivery Date: 09-AUG-2006 Comments: ✓ Document Text Commodity Total: 12,014.05 Accounting Total: 12,014.05 Requestor/Delivery Information Vendor Infor Enabled Fields Balancing/Completion Requestor: Susan Deigh/Dr. Janeskildare COA: W ♥ Wayne State University Organization: 12C1 biologizer Schees Administration Email: sdeigh@wayne.edu Phone: 313 9667657 Extension: Fax: 313 9930307 Extension: Ship To: 01 ▼ Disabled Fields Steet Line 1: CENTRAL RECEIVING - SCOTT HALL Street Line 1: CENTRAL RECEIVING - SCOTT HALL Disabled Fields State or Province: MI Zip or Postal Code: 48201 Nation: United States of America Extension: Extension: Extension: Extension: Contact: CENTRAL RECEIVING - SCOTT HALL Extension: Extension: Extension:	
Delivery Date: 09-AUG-2006 Image: Comments: Comments: Image: Proceeding of the second	
Commodity Total: 12,014.05 Accounting Total: 12,014.05 Image: Commodity Total: 12,014.05 Image: Commodity Total: 12,014.05 Requestor: Susan Deigh/Dr. Jacor Kildare Enabled Fields Balancing/Completion Requestor: Susan Deigh/Dr. Jacor Kildare COA: Image: Wilder Million Organization: 12C1 Biologicar Sciences Administration Email: sdeigh@wayne.edu Phone: 313 9667657 Extension: Fax: 313 9930307 Extension: Ship To: 01 Image: Street Line 1: CENTRAL RECEIVING - SCOTT HALL Disabled Fields Street Line 2: 540 E. CANFIELD Disabled Fields Street Line 3: Street Line 3: Building: Clear: Clear: Clear: Clear: City: DetroIT State or Province: MI Zip or Postal Code: 48201 Hall Hall Hall Nation: United States of America Extension: Contact: CENTRAL RECEIVING - SCOTT HALL Image: Street Line 3: Im	
Requestor/Delivery Information Vendor Infor Enabled Fields Accounting Balancing/Completion Requestor: Susan Deigh/Dr. Janes Kildare COA: W Wayne State University Organization: 12C1 Biological Sciences Administration Email: sdeigh@wayne.edu Phone: 313 9667657 Extension: Fax: 313 9930307 Extension: Ship To: 01 Image: Sciences Administration Fax: 313 9930307 Extension: Ship To: 01 Image: Sciences Administration Fax: 313 9930307 Extension: Street Line 1: CENTRAL RECEIVING - SCOTT HALL Image: Sciences Disabled Fields Image: Sciences Image: S	
Requestor/Delivery Information Enabled Fields Secounting Balancing/Completion Requestor: Susan Deigh/Dr. Jacober Kildare COA: W Wayne State University Organization: 12C1 Biological Sciences Administration Email: sdeigh@wayne.edu Phone: 313 9667657 Extension: Fax: 313 9930307 Extension: Ship To: 01 Street Line 1: CENTRAL RECEIVING - SCOTT HALL Fax: 313 9930307 Extension: Street Line 2: S40 E. CANFIELD Disabled Fields Juilding: Disabled Fields Building: Cloor: Gloor: 48201 Juilding: Juilding: Juilding: City: DETROIT 48201 Aston Juilding: Juilding: Juilding: Juilding: Gloor: 48201 Nation: United States of America Extension: Contact: Central RECEIVING - SCOTT HALL Scout Hall	
Requestor/Delivery Information Vendor Infor Lindbicur Picturs Accounting Balancing/Completion Requestor: Susan Deigh/Dr. Janes Kildare COA: W Wayne State University Organization: 12C1 Biologicar Stences Administration Email: sdeigh@wayne.edu Phone: 313 9667657 Extension: Fax: 313 9930307 Extension: Ship To: 01 Image: Street Line 1: CENTRAL RECEIVING - SCOTT HALL Fax: 313 9930307 Extension: Street Line 2: 540 E. CANFIELD Disabled Fields Disabled Fields Building: Eleor: Disabled Fields Image: State or Province: MI Zip or Postal Code: 48201 Nation: United States of America Extension: Image: Contact: CENTRAL RECEIVING - SCOTT HALL	
Requestor: Susan Deigh/Dr. Jacker Kildare COA: W Wayne State University Organization: 12C1 Biologient Sciences Administration Email: sdeigh@wayne.edu Phone: 313 9667657 Extension: Fax: 313 Ship To: 01 Street Line 1: CENTRAL RECEIVING - SCOTT HALL Fax: 313 Street Line 2: S40 E. CANFIELD Disabled Fields Street Line 3: Eteroir Disabled Fields Building: Eteroir 48201 City: DETROIT 48201 Nation: United States of America Telephone: Extension: Contact: CENTRAL RECEIVING - SCOTT HALL	
Requestor: Susan Deigh/Dr. Jacker Kildare COA: W ▼ Wayne State University Organization: 12C1 Biological Stichness Administration Email: sdeigh@wayne.edu Phone: 313 9667657 Extension: Fax: 313 9930307 Extension: Ship To: 01 ●	_
Organization: 12C1 Biologian Specifices Administration Email: sdeigh@wayne.edu Phone: 313 9667657 Extension: Ship To: 01 Street Line 1: CENTRAL RECEIVING - SCOTT HALL Street Line 2: 540 E. CANFIELD Disabled Fields Building: City: DETROIT State or Province: MI Zip or Postal Code: 48201 Nation: United States of America Telephone: CENTRAL RECEIVING - SCOTT HALL	
Phone: 313 9667657 Extension: Ship To: 01 Street Line 1: CENTRAL RECEIVING - SCOTT HALL Street Line 2: S40 E. CANFIELD Disabled Fields Building: City: DETROIT State or Province: MI Zip or Postal Code: 48201 Nation: United States of America Telephone: Extension: Contact: CENTRAL RECEIVING - SCOTT HALL	
Ship To: D1 Street Line 1: CENTRAL RECEIVING - SCOTT HALL Street Line 2: 540 E. CANFIELD Disabled Fields Building: City: DETROIT State or Province: MI Zip or Postal Code: 48201 Nation: United States of America Telephone: Extension: Contact: CENTRAL RECEIVING - SCOTT HALL	
Ship To: 01 Street Line 1: CENTRAL RECEIVING - SCOTT HALL Street Line 2: 540 E. CANFIELD Disabled Fields Building: City: DETROIT State or Province: MI Zip or Postal Code: 48201 Nation: United States of America Telephone: Extension: Contact: CENTRAL RECEIVING - SCOTT HALL	
Street Line 1: CENTRAL RECEIVING - SCOTT HALL Street Line 2: S40 E. CANFIELD Disabled Fields Building: City: DETROIT State or Province: MI Zip or Postal Code: 48201 Nation: United States of America Telephone: Extension: Contact:	
Street Line 2: 540 E. CANFIELD Street Line 3: Building: City: DETROIT State or Province: MI Zip or Postal Code: 48201 Nation: United States of America Telephone: Extension: Contact:	
Street Line 3: Building: City: DETROIT State or Province: MI Zip or Postal Code: 48201 Nation: United States of America Telephone: Extension: Contact: CENTRAL RECEIVING - SCOTT HALL	
Building: Eleon: City: DETROIT State or Province: MI Zip or Postal Code: 48201 Nation: United States of America Telephone: Extension: Extension: Contact: CENTRAL RECEIVING - SCOTT HALL	
City: DETROIT State or Province: MI Zip or Postal Code: 48201 Nation: United States of America Telephone: Extension: Contact: CENTRAL RECEIVING - SCOTT HALL	
State or Province: MI Zip or Postal Code: 48201 Nation: United States of America Telephone: Extension: Contact: CENTRAL RECEIVING - SCOTT HALL	
Nation: United States of America Telephone: Extension: Contact: CENTRAL RECEIVING - SCOTT HALL	
Telephone: Extension: Contact: CENTRAL RECEIVING - SCOTT HALL	
Contact: CENTRAL RECEIVING - SCOTT HALL	
Attention To: See Document Text for Delivery Info	

On Your Own Activity: Parts of a Form



(Return to Table of Contents)

Lesson 2: Getting Started in Banner Lesson Activity – Parts of a Form

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.

(Return to Table of Contents)

Lesson 2: Getting Started in Banner Topic 4: Using the Mouse & Keyboard

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.

(Return to Table of Contents)

Lesson 2: Getting Started in Banner Topic 4: Using the Mouse & Keyboard

Keys	Description	
Ctrl F1	Display "Show Ke	eys" 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' butt current form	on – cancels a query or exits

*Fundamental keystrokes for all users

Discussion: Mouse Shortcut

A useful mouse shortcut involves **rightclicking** 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.

(Return to Table of Contents)

Lesson 2: Getting Started in Banner Topic 4: Using the Mouse & Keyboard

TD. 000100704		
ID: 000199799		
	Bollback	
urront Idontificatio	Save	
unenciuendicado	Exit	
	Print	
ID:	Add to Personal Menu	
Derson	Current Identification	
Ferson	Alternate Names or IDs	
	Address	
Last Name:	Telephone	
First Name:	Biographical	
Middle Name:	E-mail	
Prefix:	Emergency Contact	
Suffix:	Application for Positions [PAAAPPL]	
Preferred First Na	List of Applications by Applicant [PAIALST]	
Full Legal Name	Employee Information [PEAEMPL]	
r un cegui riunie.	Address List [PPIADDR]	
	E-mail Addresses [GOAEMAL]	
	Person Search [SOAIDEN]	
	Non-Person Search [SOACOMP]	
Non-Person	Employee Search [POIIDEN]	
	Person System Identification [GUASYST]	
Name:	General Information Form [PPAGENL]	

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

(Return to Table of Contents)

Lesson 3: Banner Forms Lesson Overview & Agenda

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.

(Return to Table of Contents)

Discussion: Understanding Form Names – Continued



(Return to Table of Contents)

Discussion: Example Form Names

Some examples...

	Example: FPAREQN	Example: SAAADMS	Example: <i>POIIDEN</i>
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)

(Return to Table of Contents)

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



(Return to Table of Contents)

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.

(Return to Table of Contents)

Lesson 3: Banner Forms Topic 2: Accessing Banner Forms

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.



(Return to Table of Contents)

Lesson 3: Banner Forms Topic 2: Accessing Banner Forms

Procedure: Go To… Field

Using Go To... :

With Banner open:

- Enter the seven-character name of the desired form in the Go to... field.
- 2) Press Enter.
- The requested form is opened.


Discussion: Direct Access

You can also use the Direct	Eile Edit Options Block Direct Access Object Search [™] OuickFlow	Item Record Query Iools	Help Poliden 7.0 (TRG6C) ;	€ [∯ ⊗ X		xxxxxxxxxxxxxx x
You can also use the <i>Direct</i>	Select	۷				
Access method from within a form	Rollback	Last Name	First Name	Middle Name Change Ind	dicator Type	Birth Date
to open another form without	Refresh					
closing the current form	Print					
	Exit					
	Exit SCT Banner					
	Return to Menu					
	Preferences					
	Case Sensitive Query	V: ●No ○Yes				
	Invoke Direct Access form					T T
	Record: 1/1	Enter-Qu	<osc></osc>			

(Return to Table of Contents)

Lesson 3: Banner Forms Topic 2: Accessing Banner Forms

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.

🏽 Oracle Developer Forms Runtime - Web: Open >	POIIDEN		
Eile Edit Options Block Item Record Query T	ools Help		
(🖴 🖉 🖹 i 🍋 🖨 🗖 i 🎓 i 🎯 📾) 📓 💁 📇 📓 📓 🛛	€ [🕀 [[🕜 [X	
🙀 Employee Search Form (Employee, Applicant, C	OBRA) POIIDEN (TRNGT) 2000	******************************	000000000000000000000000000000000000000
GO TO SPAIDEN My Institut	ion: <u>Http://www.pipeline.way</u>	me.edu/	powered by SUNGARD' HIGHER EDUCATION
ID ame	First Name	Middle Name Change Indicator	Type Birth Date
			_
Case Sensitive Query: • No OYes			
Enter the object name: Press LIST for listing			
Record: 1/1	<08C>		
🤳 start 🛛 🙆 🕲 🔯 🏾 🔞 Wayne State U	🖪 Microsoft Powe 🖉 Interne	t Native 🧶 Oracle Develop 🖻 Docum	nent1 - Mi 🛞 🔄 🔒 🥑 10:52 AM

(Return to Table of Contents)

Lesson 3: Banner Forms Topic 2: Accessing Banner Forms



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.

(Return to Table of Contents)

Lesson 3: Banner Forms Activity: Using Go To... Field and Direct Access

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			<u> 년</u> 년 2
Go To Velcome, TRAIN01		Products: 💽	Menu Site Map Help Center
My Banner	20		Mulinke
SCT Banner Expan	nded menu.		My LINKS
Student [*STUDENT]			Change Banner Password
🔤 Course Catalog [*CATALOG]	Currently selected me	enu (blue)	Check Banner Message
Basic Course Information [SCACRSE]		_	Personal Link 1
Course Detail Information [SCADETL]	7 Character		
Course Registration Restrictions [SCARRES]	Form Names	2	Personal Link 2
Catalog Prerequisite and Test Score Restrictions [SCAP	Torrition		Personal Link 3
Catalog Schedule Restrictions [SCASRES]	Sub monus or form		Personal Link 4
Course Base Maintenance [SCABASE]	Sub-menus or torm.		Provide Links I
	from the selected	u menu	Personal Link 5
General Person [*PERSON]			Personal Link 6
Eaculty Load [*FACIII TY]			n
Location Management and Housing [*LOCATION]			My Institution
Recruitment [*RECRUIT]			
Admissions [*ADMISSION]			The second se
🚞 General Student [*GSTUDENT]			"Pleasure in the job
Registration [*REGISTRATION]			in the work."
Banner Broadcast Messages			- Aristotle
			19 200
		2	10 IL MAN
		۲	
Press ENTER to start selection or expand/collapse menu.			
Record: 1/1 <0SC>			

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.

Eile Edit Options Block Item Record Query Tools Help		
🕞 🖉 🖺 🖓 🖨 🗟 🖙 🛜 🕼 📾 🕲 💁 🖳 🖳 🗟 🖓 🖓 🔛 🖉		
general Menu GUAGMNU 7.2 (TRG6C) - Monday 10, 2006		× 5 ک
Go To Velcome, TRA	Products: 💌	Menu Site Map Help Center
My Banner		Mylinks
SCT Banner 2		
Student [*STUDENT]		Change Banner Password
Course Catalog [*CATALOG]		Check Banner Message
Basic Course Information [SCACRSE]		Devery all Links of
Course Detail Information [SCADETL]		Personal Link 1
Course Registration Restrictions [SCARRES]		Personal Link 2
Catalog Prerequisite and Test Score Restrictions [SCAPREQ]		Personal Link 3
Catalog Schedule Restrictions [SCASRES]		
Course Base Maintenance [SCABASE]		Personal Link 4
College and Department Text [SCATEXT]		Personal Link 5
Class Schedule [*SCHEDULE]		Personal Link 6
General Person [*PERSON]		
Faculty Load [*FACULTY]		
Location Management and Housing [*LOCATION]		My Institution
Admissions [*ADMISSION]		"Pleasure in the job
General Student [*GSTODENT]		puts perfection
	<u></u>	in the work.
Banner Broadcast Messages		- Aristotie
	^	
	2	
	•	
Press ENTER to start selection or expand/collapse menu.		

Procedure: My Banner

To add a form to My Banner :

- 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.

D: 000189786 Anne G.	Sabb	Generate ID: 🔮
	Bollback	
	Save	\frown
rrent Identification	te Identifii E <u>x</u> it	B al E-mail Emergency Contar
	Print	< <u> </u>
D: Name	Type: Add to Personal Menu SSN/	SIN/TIN:
	K	
Person	Current Identification	ID and Name Source
CISON	Aldernate Names or IDS	1D and Name Source
ast Name:		Last Update
irst Name:	Biographical	
liddle Name:	E-mail	User:
refix:	Emergency Contact	Activity Date:
uffix:	Application for Positions [PAAAPPL]	Origin:
referred First Name:	Employee Information [DEAEMD]	<u></u>
	E-mail Addresses [GOAEMAE]	
	Non-Bercon Search [SOACOMB]	Original Creation
· · · · · · ·	Employee Search [POLIDEN]	
Jon-Person	Person System Identification [GUASYST]	User:
	General Information Form [PPAGEN]	Create Date:
lame:		

(Return to Table of Contents)

Lesson 3: Banner Forms Topic 2: Accessing Banner Forms

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 rightclick 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		
(□ ∽ □ 1⁄2 ↔ □ ∞ 1∕2 № 1/2 ∞ ∞ 1/2 0 ∞ ∞ 1/4 1/2 0 × −		
🙀 General Menu 🛛 GUAGMNU (TRG6C) - Thursday July 27, 2006		⊻ ⊕ ×
Go To Velcome, TRAIN01	Products: 💌	<u>Menu Site Map Help Center</u>
My Banner	A	My Links
🖼 SCT Banner		
Student [*STUDENT]		Change Banner Password
🗀 Advancement [*ALUMNI]		Check Banner Message
GiFinancial [*FINANCE]		
🗀 General Ledger [*FINGENLL]	22	FPAREQN
Finance Operations [*FINOPER]		FPACHAR
Stores Inventory [*FINSTORES]		FOAUAPP
Purchasing and Procurement [*FINPURCH]		
🗎 Accounts Payable [*FINAP]		FOAAINP
Budget and Position Control [*FINBUDG]		FOMPROF
Eixed Asset [*FINASSET]		FOIDOCH
Cost Accounting [*FINCOST]		<u>roiboch</u>
🗎 Endowment Management [*FINENDOW]		
🗀 Investment Management [*FININVEST]		My Institution
🗎 Accounts Receivable [*FINAR]		
Research Accounting [*FINRESEARCH]		
🗎 Electronic Data Interchange [*FINEDI]		puts perfection
Archive [*FINARCH]	•	in the work."
Banner Broadcast Messages		- Aristotle
Press ENTER to start selection or expand/collapse menu.		D

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 dit Options Block Item Record	d Query Tools Help
Direct Access	🔋 🕲 📾 🖳 🖳 🛯 🖉 🕼 🐗 🗇 🐨 🗶 🛛 🖉
Object Search ^{NS}	
QuickFlow	
Select	
Rollback	
Save	
Refresh	
Print	
Exit	
Exiţ QuickFlow	
Exit SCT Banner	
Return to Menu	
Preferences	
1. <u>EEI1PAY</u> One-Time Payment Inquiry 2. <u>EEAESCH</u> Employee Status Change <u>3. <u>PEAEMPL</u> Employee</u>	
Invoke Direct Access form	

(Return to Table of Contents)

Lesson 3: Banner Forms Topic 2: Accessing Banner Forms

Procedure: Last 10 Forms

	File dit Option k Item Record Query Tools Help
	Direct Access 1
Procedure:	Qbject Search ■ QuickFlow Select
From the main menu:	Bollback Save Refresh
1) Click the File menu.	Print Exit
2) Select the PEAEMPL form.	Exit SCT Bameri Return to Menu
PEAEMPL opens	1. PEI1PAY One-Time Payment Inquiry 2. PEAESCH Employee Status Change
Click Exit to return to the main menu.	3. <u>PEAEMPL Employee</u>
	Invoke Direct Access form
	Record: 1/1 <0SC>

(Return to Table of Contents)

Lesson 3: Banner Forms Topic 2: Accessing Banner Forms



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)

(Return to Table of Contents)

Lesson 3: Banner Forms Lesson Review

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.

(Return to Table of Contents)

Lesson 4: Performing Inquiries Topic 1: Query Basics and Wildcards

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.

E	amples:	
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

(Return to Table of Contents)

Lesson 4: Performing Inquiries Topic 1: Query Basics and Wildcards

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 is 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: <u>Except</u> 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.

(Return to Table of Contents)

Lesson 4: Performing Inquiries Topic 1: Query Basics and Wildcards

Procedure: Perform a Query from a Form Field

- 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.

ঌ Internet N	ative Banner [INB] Web TRNG6 7.	.0+: Open > SPAIDEN	
Eile Edit 🤉	Options Block Item Record	Query Tools Help	
	🍋 🖨 🗟 🎓 🍞	↓ I 🖉 🖌 🔛 I 🚇 I 🕸 🕷 I 🚸 I 🕲 I X	
🧟 General	Person Identification SPAIDE	$\times \ge$	
_			
ID:	Car%	Generate ID: 🚰	
	🎇 Internet Native Banner [INB]] Web TRNG6 7.0+: Open > SPAIDEN	- 🗆 ×
Current Id	Eile Edit Options Block It	cem <u>R</u> ecord Query Tools Help	
	🔲 🔊 🖹 i 🍋 🖶	🖻 👔 🖥 🖼 📾 🖳 🖳 🔛 🖉 🕼 🕼 👘 🖉 🕼 🖉 🖉 😵 🖉 🖉 😵 🖉	
ID:	🙀 General Person Identifica	tion SPAIDEN 7.2 (TRG6C)	≚×
Person		Carrousel, Shirley TR26116	
		Carter, Nikki Rochelle 000281794	
Last Nar	Current Identification	Carter, Nikki Rochelle 172693 prince Generative Carter, Sikki Rochelle 172693	atact
First Na		Carver, Cynthia Marie 003431195	10000
Middle N	ID:	Carver, Cynthia Marie TR1511	
Prefix:		Search Results:	
Suffix:	Person	Person Search Detail: 📔 Non-Person Search Detail: 📔 e	
Full Lena		Reduce Search By	
. un Logi	Last Name:	○ Person ONOn-Person ® Both	
	First Name:	Enter search criteria then press Execute Query or select button to reduce search.	
	Middle Name:	City: SSN/SIN/TIN:	
Non-Pe	Prefix:	State or Province:	
	Suffix:	ZIP or Postal Code: Gender:	
Name:	Preferred First Name:	Name Type:	
	- Fun Leyal Name:		
		Press Enter Query or select button to clear search.	
Name; Ente			
Record: 1/1	Non-Person	Liser:	
		Create Date:	
	Name:		
	ID number; LIST for person; CC	JUNT HITS for non-person; DUP ITEM to generate ID; DUPLICATE RECORD for Alternate ID look-up.	
	Record: 1/1	<08C>	

(Return to Table of Contents)

Lesson 4: Performing Inquiries Topic 4: Perform a Query from a Form Field

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

Ŷ

- 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.

arch Results:	Non-	▼ Person Search Detail:	3	
Person	Reduce Search	® By		
ter search criteria then p City: State or Province: ZIP or Postal Code: Name Type:	ress Execute Query or s	elect button to reduce SSN/SIN/TIN: Birth Date: Gender:	search.	
ess Enter Query or select	button to clear search.			

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

Steps:	Action:				
1) Open PEAEMPL	Loads the employee information form.				
 Delete any entry in the ID field, then tab to the next field. 	Positions cursor in field to be searched on.				
 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.					
 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) <i>"Next Block"</i> using the toolbar or Ctrl + Pg Down on the keyboard.	"Populates" the data block fields with the applicable information.				

(Return to Table of Contents)

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.

Elle Ealt	Contions Block	V 7.1 (TR		〕 ⊠ I & I ⊕	[555555555555555555555555555555555555555	1999-1999-1999-1999-1999-1999-1999-199	۲× ۲
ID:					Generate	ID:			
Current	Identification	Alternate Identification	Address	Telephone	Biographi		2	Emergency Contact	t
Derso	n n		Non-Person Search	(SOACOMP)		ID and N	ame Source		
	Solution Internet Nativ	e Banner [INB] Weh IRNGE	Alternate ID Search	h (GUIALTI)					
Last	File Edit Ontir	ans Block Item Record							_
First					Ø	X			
Midd	Person Sean	Th SOAIDEN 7.0 (TRGE			6.16.16.16.16				
Prefi		SH SOMEEN 7.5 (HOE							
Prefi Suffi:				Can	cel)				
Prefi Suffi: Prefe				Can	cel				
Prefi Suffi: Prefe Full L	ID	Last Name	First Name	(Can Middle Name	cel Birth Date	Change Indicator	Type		
Prefi Suffi: Prefe Full L	ID 003088770	Last Name	First Name	Can Middle Name	cel Birth Date	Change Indicator	Type V		
Prefi Suffi: Prefe Full L	ID 003088770 000456789	Last Name Grove	First Name Juanita Justin	Can Middle Name	Birth Date	Change Indicator	Type Type		
Prefi Suffi: Prefe Full L	ID 003088770 000456789 003059960	Last Name Grove Grove Grove	First Name Juanita Justin Karen	Can Middle Name G G	Birth Date	Change Indicator	Type		
Prefi Suffi: Prefe Full L Non	ID 003088770 000456789 003059960 000287889	Last Name Grove Grove Grove Grove Grove	First Name Juanita Justin Karen Kenneth	Can Middle Name G Allan	Birth Date	Change Indicator	Type		
Prefi Suffi: Prefe Full L Non Nami	ID 003088770 000456789 003059960 000287889 000206238	Last Name Grove Grove Grove Grove Grove Grove	First Name Juanita Justin Karen Kenneth Kristal	Can Middle Name G Allan Lynnette	Birth Date	Change Indicator	Type		
Prefi Suffi Prefe Full L Non	ID 003088770 000456789 00355960 000287889 000206238 000206238	Last Name Grove Grove Grove Grove Grove Grove	First Name Juanita Justin Karen Kenneth Kristal Laura	Can Middle Name G Allan Lynnette Jeanette	Cel Birth Date 16-FEB-1980 27-MAR-1971 22-JAN-1972 05-AUG-1942	Change Indicator			
Prefi Suffi Prefe Full L Non	ID 003088770 000456789 003059960 000287889 000206238 00003692 00035692 000271294	Last Name Grove	First Name Juanita Justin Karen Kenneth Kristal Laura ster	Can Middle Name G Allan Lynnette Jeanette	Cel Birth Date 16-FEB-1980 27-MAR-1971 22-JAN-1972 05-AUG-1942	Change Indicator			
Prefi Suffi Prefe Full L Non Name	1D 003088770 000456789 003059960 000287889 000206238 000035692 003271294 003271294 003120626	Last Name Grove Gr	First Name Juanita Justin Karen Kenneth Kristal Laura ster ise	Can Middle Name G G Allan Lynnette Jeanette	Cel Birth Date	Change Indicator			
Prefi Suffi: Prefe Full L Non Name Rame; I Record;	ID 003088770 000456789 003059960 000287889 00026238 000035692 003271294 003120626 003271294	Last Name Grove Gr	First Name Juanita Justin Karen Kenneth Kristal Laura ter ise ion	Can Middle Name G G Allan Lynnette Jaenette Donaldson	Birth Date	Change Indicator			
Prefi Suffi: Prefe Full L Non Name Record:	ID 003088770 000456789 003059960 000287889 00026238 000035692 003271294 003120626 0032103 00328103 00328103 003164397	Last Name Grove Gr	First Name	Can Middle Name	Birth Date	Change Indicator			
Prefi Suffi: Prefe Full L Non Name; I Record	ID 003088770 000456789 003059960 000287889 000206238 00035692 003271294 0031202666 003028103 003164397 003164397 003164397	Last Name Grove Gr	First Name Juanita Justin Karen Kenneth Kristal Laura ster tse tion Martin Regina Dichard	Can Middle Name	Birth Date				
Prefi Suffi: Prefe Full L Non Name Name; I	ID 003088770 00455789 003059960 000287889 00026238 00035692 003271294 00312626 003028103 003164397 000478201 00304551 000478201 00089551	Last Name Grove Gr	First Name Juanita Justin Karen Kenneth Kristal Laura ter ise rion Martin Regina Richard Pabert	Can Middle Name G G Lynnette Jeanette Donaldson Patrice Louis	Cel Birth Date	Change Indicator			
Prefi Suffi: Prefe Full L Non Name: Record	1D 003088770 000456789 000287889 000206238 00036926 003271294 003120626 003271294 003120626 00322103 003164397 000478201 003089551 003410387 000417251	Last Name Grove Gr	First Name Juanita Justin Karen Kenneth Kristal Laura ter se rion Regina Richard Robert Sadra	Can Middle Name	Cel Birth Date	Change Indicator			

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.

(Return to Table of Contents)

Lesson 4: Performing Inquiries Topic 3: Perform a Query Using an Application Form

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.

🏙 Oracle Developer Forms Runtime - Web: Open > PPAIDEN File Edit Options Block Item Record Query Tools Help 🗛 🔊 🖹 🗚 🖶 🖨 🖨 😭 🎲 💱 🖓 📾 🔀 🗛 🗛 🛯 🖉 🖓 👘 🛠 🖓 🖓 Galdentification PPAIDEN (TRNGT ID: 003110384 TMr. Robert Grove 8 Generate ID: Current Identification Alternate Identification Address Emergency Contact Telephone Biographical E-mail 🏙 Oracle Developer Forms Runtime - Web: Open > PPAIDEN File Edit Options Block Item Record Query Tools Help Current Identification 🔒 🌑 🚯 [📇 [📓 📓 🛭 🎼 🗍 🌐 🗍 🛞 🛙 🗙 Person Alternate Names or IDs 🧑 Identi Address Telephone Last Name 8 ID: Generate ID: Biographical First Nam(E-mail Middle Na Emergency Contact Address Telephone Emergency Contact Prefix: Current Application for Positions [PAAAPPL] Biographical E-mail List of Applications by Applicant [PAIALST] Suffix: Employee Information [PEAEMPL] Preferred ID: SSN/SIN/TIN: Address List [PPIADDR] Full Legal E-mail Addresses [GOAEMAL] Perso Person Search [SOAIDEN] ID and Name Source Non-Person Search [SOACOMP] Employee Search [POIIDEN] Last Update Last N Person System Identification [GUASYST] Non-Per First N General Information Form [PPAGENL] TRAIN04 Middle User: Activity Date: 01-APR-2004 Prefix: Mr Name: Suffix: Origin: PPAIDEN Preferred First Name: Robert Full Legal Name: Current identif Record: 1/1 **Original Creation** Non-Person User: Create Date: Name Current identification number; overtype to change <0SC> Record: 1/1

(Return to Table of Contents)

Lesson 4: Performing Inquiries Topic 3: Perform a Query Using an Application Form

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.
 Click the search (down arrow) key real 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.
 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 <i>Execute Query</i> in the toolbar, or press F8.	Runs the search.
If you get too many matches here, press F7 to clear the name	e screen and search again. This time, add the first
6) In the last name field, re-enter "des_" and then tab to the first name field and enter in "robert" and then <i>Execute Query.</i>	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) <i>"Next Block"</i> using the toolbar or Ctrl + Pg Down on the keyboard.	<i>Next block</i> 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.
 Click the search button reaction in the Neuropean Search button 	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".
 Press F8 or click the Execute Query button in the toolbar 	The query is executed and the search results are displayed.
 Double-click the ID # for Eastman Fire Protection, Inc. 	Eastman Fire Protection information is returned to the FMTVEND form.
 "Next Block" using the toolbar or Ctrl + Pg Down on the keyboard. 	Next block causes the data to populate the record fields.
 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

File Edit Options Block Item Record Query Tools Help 4 2 'n Xs Xs 4. 44 2 I X 🙀 Source/Background Institution Query-Only SOISBGI 7.0 (TRG6C) Source or Background Institution You can also use an inquiry 2 State or Admission City Province **Request Code** form to search for Type Code Name . information. B% 1. Launch the inquiry form you will be using and enter the criteria into a Eile Edit Options Block Item Record Query Tools Help field within the form. >= 2 Xs Xs 4 🚸 [🕜 [🗙 5 a X Source/Background Institution Ouery-Only SOISBGI 7.0 (TRG6C) Source or Background Institution 2. Execute the query and 2 2 State or Admission the results will be Citv Туре Code Name Province Request Code • displayed on the form. 0009 Bishop State Community College 0012 Birmingham-Southern College 0080 Bevill State Community College 0131 Baptist System Schools Of Nurs 0135 Baptist School Of Radiologic T 0165 Butte College 0168 Bakersfield College 0169 Barstow College 0171 Bethany Bible College 0172 **Biola University** Enter a query Record: 1/1 0198 Brooks College 0200 Bekins Scholarship Foundation, 0513 Beth-el College Of Nursing 0629 Brandywine College Of Widene

(Return to Table of Contents)

Lesson 4: Performing Inquiries Topic 2: Perform a Query Using An Inquiry Form

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.
 Click the Execute Query icon for 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 availability 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.

Lesson 4: Performing Inquiries Topic 5: Common Forms to Query

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

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.



(Return to Table of Contents)

Lesson 5: Understanding FOAPAL Topic 2: Define and Identify FOAPAL String and Elements Note: To create a FOAPAL, you need two pieces of information, the index code and account code.

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.



(Return to Table of Contents)

Lesson 5: Understanding FOAPAL Topic 3: Identify Index Codes

Review: Understanding FOAPAL

In this Lesson you learned:

- The definition of FOAPAL and identifying FOAPAL string
- How to identify index codes

(Return to Table of Contents)

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

(Return to Table of Contents)

Lesson 6: Features in Banner Lesson Overview - Agenda

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.

(Return to Table of Contents)

Lesson 6: Features in Banner Topic 1: Use the Calculator & Calendar

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.



(Return to Table of Contents)

Lesson 6: Features in Banner Topic 1: Use the Calculator & Calendar
Version 1.2 June, 2007

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.



(Return to Table of Contents)

Lesson 6: Features in Banner Topic 1: Use the Calculator & Calendar

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.

Sinternet Native Banner [INB] Web TRNG6 7.0+: Open > SPAIDEN - GUAPARM - SOAHOLD - GUACALN		
		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
		= 0
ID: 003432047 Christina Possessed Carr		
Hold Details (2)	🙀 Calendar GUACALN 7.0 (TRG6C) 2000/2000/2007 🗙	
Hold Type: AR TAR Hold Non-Student	Re << < JUNE 2006 >>>	Indicator 📃 🦳
Amount: From: 27-JUN-2006	То:	
	SUN MON TUE WED THU FRI SAT	
Hold Type:	Re. 1 2 3	Indicator
Amount: From:	To: 4 5 6 7 8 9 10	
	11         12         13         14         15         16         17           Pe         10         10         20         21         22         24         24	Indicator
Amount: From:		
Hold Type:	Re	Indicator
Amount: From: 🗐	To: Today OK Cancel	
Hold Type:	Reason:	Indicator
Amount: From: E	To: Origination Code:	
Hold Type:	Reason: Release	
Record: 6/7	<08C>	

#### (Return to Table of Contents)

Lesson 6: Features in Banner Topic 1: Use the Calculator & Calendar

## 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 <i>link</i> 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.

(Return to Table of Contents)

*Lesson 6: Features in Banner* Topic 1: Use the Calculator & Calendar

#### **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.

(Return to Table of Contents)

Lesson 6: Features in Banner Topic 3: Change Banner Password

## Procedure: Change Banner Password

#### Procedure:

 $\checkmark$ 

- 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 retype your new password.
- 5) Click Save 🗐 or press the enter/return key.

🙀 Oracle Password Change Form	GUAPSWD 7.0 (TRG6C) 000000000000000 <b>⊻ ⊼</b> ×
Oracle User ID: Oracle Password: Database:	TRAIN01
New Oracle Password: Verify Password:	

*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.

#### (Return to Table of Contents)

Lesson 6: Features in Banner Topic 3: Change Banner Password

#### **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)

(Return to Table of Contents)

*Lesson 6: Features in Banner* Lesson Review

## 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.

(Return to Table of Contents)

Appendix: Quick Reference Topic 1: Parts of the Interface

## **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**



(Return to Table of Contents)

Appendix: Quick Reference Topic 3: Understanding Form Names

## **Topic 4: Common Forms to Query in HRMS**

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

#### **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.
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.

## Topic 4: 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	<ul> <li>Inquire on a specific encumbrance number posted to the system</li> <li>Provides data on all transactions posted against the specific encumbrance</li> </ul>
FGITRND (replaces screen 023 & 27)	Detail Transaction Activity	<ul> <li>Inquire on detail transactions for specific FOAPAL elements</li> <li>Inquire by specific fiscal year</li> <li>Inquire on specific document information</li> </ul>
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	<ul> <li>Inquire on general ledger trial balance activity at the summary level</li> <li>Inquire by fund and/or account code and fiscal year</li> <li>Inquire on fund balance</li> </ul>
FGIBDST Replaces screen 019)	Organization Budget Status Form	<ul> <li>Inquire on budget availability by Org., Fund, Program, Account Code, Account type.</li> <li>Inquire on adjusted budget, YTD actual expenses incurred, commitments, and available balance.</li> <li>Inquire on detail transactions for actual YTED activity or by encumbrances.</li> <li>Inquire by specific fiscal year.</li> </ul>
FGIBDSR	Executive Summary Form	<ul> <li>Inquire on budget availability by specific FOAPAL elements at the highest summary level.</li> <li>Inquire by index and fiscal year; Inquire by detail description</li> </ul>
FOIDOCH	Document History	Inquire on all aspects of a purchase requisition.

Appendix: Quick Reference Topic 4: Common Inquiry Forms

#### 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