Banner General Quick Reference





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Logon

- Open Internet Explorer
- In Address field enter the following URL: <u>http://www.siue.edu/its/banner</u>
- Select appropriate Banner link (Mac/PC)
- Username Key in your username (e-id)
- Password Key in e-id password
- Database Leave blank
- Click Connect or press Enter
 - The Banner Main Menu will open

Password Change

Your password to Banner is maintained as you manage your e-ID password. You will never change your password from within Banner.

Initial Logon

- Do not attempt to log into Banner until you have received an email from ITS Production Control
- After you have attended training and submitted a completed System Access Request From (SARF) you will receive an email from ITS Production Control with instructions for you initial log in
- Email <u>oitaccts@siue.edu</u>:
 - If email not received after 2 business days of forwarding your SARF to Production Control
 - If your account is locked

Banner Form Example

Menu	SAAADMS Form
Bar 🔪	🔬 Oracle Developer Forms Runtime - Web: Open > SAAADMS [Q]
	File Edit Options Block Item Record Query Tools Help
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	Search Button Application Curricula Fees, Mail Submission, Withdrawal Data Checklist Sources, Interests, Comments Contacts, Cohorts, Attributes
	Application Information Blocks Entry Term: K00213 Spring 2002 Application Number: 1 Application Preference: Application Date: 24-0CT-2001 C Application D Ap
	Admission Type: T3 Transfer / 30 hrs attempted Student Type: T Tarnsfer / Transfer / Tarnsfer / Tar
	Curricula Summary - Primary PriorityTerm Program Catalog Level Campus College Degree 1 200215 Arts and Sciences - 200215 Undergraduate Edwardsville College of Arts and Sci Undedared
	Field of Study Summary Priority Term Field of Study Department Attached to Major 1 200215 Major Undeclared Undeclared
	Auto Hint/Status Line

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Logon Mindow



List of Values (LOV)

Using List of Values to Populate Field

- (Search) indicates the field has List of Values
 - Click on 🖾 (Search) to open list
 - If an **Option List** opens click to select appropriate option
 - Some LOV are not available in query mode
 - Double click on the desired value

Shorten the LOV

- Click before or after the % sign (wild card) and enter a letter or string of letters
 - Use the % sign in any position
 - Use more than one % if appropriate
- Click the Eind button
- Double click on the desired value
 - The list closes and field populates with the value

P SIUE Undergrad to Professional R Returning T Transfer V Transient - New X Conversion

New

Find %

Code

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N

My Banner

Create a personalized menu that fits your needs. Customize with frequently used Objects (Forms, Menus and QuickFlows).

Create My Banner Menu

- Key GUAPMNU in the Object Search field on the Banner Main Menu
 - Press Enter
 - This opens the My Banner Maintenance form
- By default, cursor should be in Object column of Personal Menu

Note: Order of objects in My Banner will be in the order that objects were entered.

- **Object** Key in desired object name
- **Description** Can be changed (optional)
 - Changed description is only shown in My Banner
- To add additional objects:
 - Press Down (arrow)
 - Key in object name
 - Key in new description (optional)
 - Repeat until all objects are added
- Click <a>[]
 (Save)
- Click (Exit) to close form and return to Banner Main Menu

Note: Changes to My Banner will not show on Main Menu until the next logon to Banner

Banner Main Menu

Address Type LOV

Environmental Res. Trng Ctr

SIVE Undergrad to Graduate

Student Type Code Validation (STVSTYP)

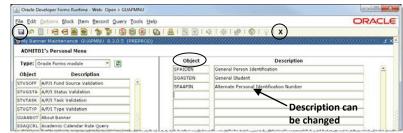
Description

Unassigned

Continuing



My Banner Maintenance GUAPMNU



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Modify My Banner

- Key GUAPMNU in the Object Search field on the Banner Main Menu
 - Press Enter

Add Objects

Follow procedure for Create My Banner Menu

Delete Objects

- Double click on object(s) to select to remove from Personal Menu (right side)
 - Text color will change to blue
- Click (Remove) to remove selected object(s)
- OR click (Remove All) to remove all objects from Personal Menu
- Click 🔲 (Save)
- Click X (Exit) to close form and return to Banner Main Menu

Preferences

- Select File (Menu Bar), Preferences
- Use Preferences settings to view form name [XXXXXXX] in menus and set other display options

Display Options

Click Display Options tab

Display Options Block

- Check boxes:
 - Display Form Name on Title Bar
 - Display Form Name on Menu
 - Display Release Number on Title Bar
 - Database Instance on Title Bar

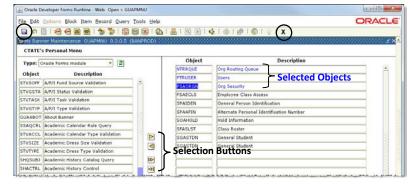
Alert Options

- Check boxes (optional):
 - Prompt Before Exiting Banner (If box not checked, will close Banner without any warning)
 - Display Additional Confidential Warning
 - Display Additional Deceased Warning
 - Display Duplicate SSN/SIN/TIN Warning (If you are responsible for data entry to create/update person information)

Data Extract

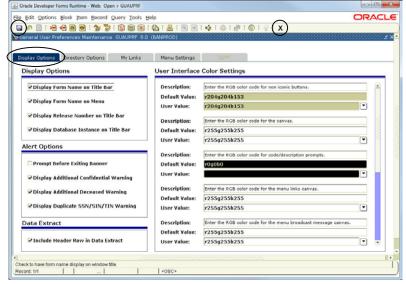
- Check box for Include Header Row in Data Extract
- Click 🔲 (Save)
- Click X (Exit) to close form and return to Banner Main Menu

My Banner Maintenance GUAPMNU



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Direct Access	199901\$\$190001012180141++++++++++++++++++++++++++++++++++	
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Bollback Save Refresh		My Links
frint isit	STUDENT] nent [*ALUMNI] isoures [*IRB]	Check Banner Messages
Exit QuickFlow Exit Banner	Aid [*RESOURCE]	Personal Link 1
Peturn to Menu	GENERAL]	Personal Link 2
references	curity [*SECURITY]	Personal Link 3
		Deconal Link 4

General User Preferences Maintenance GUAUPRF



Banner Main Menu GUAGMNU File Menu

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Form Toolbar

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Save Select Remove Next Next Execute Image: Select Record Record Block Query	View/Send Inactive Message Buttons Exit
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(F10) – Save: Save data entered or changed	
(hift+F7) – Rollback: Returns to Key Block	
Select: Select data to return to Key Block or data field fro	om soarsh /guory
Insert Record: Add record to Information Block	on search/query
Remove Record: Permanently remove a record	
Previous Record: Returns to previous record viewed (if n	more than one)
Next Record : Goes to next available record (if more than	
(Ctrl+PageUp) – Previous Block: Returns to previous Info	
(ctrl+PageDown) – Next Block: Goes to next available In	
(F7) – Enter Query: Enter data to query on	
(F8) – Execute Query: Returns data that matches query	
Cancel Query: Query/search is cancelled and returned to	o original form
View/Send Message: Send messages to and receive mes	-
Print: Print form	
Online Help: Opens online help, if available	
(Ctrl+Q) – Exit: Exit form or Banner	
Note: Shortcut keys listed in brackets where available.	

Shortcut Keys

For menu items not available on the toolbar.

Clear Block	Shift+F5
Clear Field	Ctrl+U
Clear Record	Shift+F4
Count Query Hits	Shift+F2
Display Error	Shift+F1
Duplicate Field/Item	F3
Edit	Ctrl+E
Help (Item Properties)	Ctrl+H
List	F9
List Tab Pages	F2
Previous Field	Shift+Tab
Show Keys	Ctrl+F1
Update Record	Ctrl+F2



Name Search

Open Form

- Key in the desired form name in the Object Search Field (Go To...) on the Banner Main Menu
 - Press Enter

Open Query Form

Note: If the University ID is known, key it in the ID field and press Enter.

- In the **Key Block** of your form, click (Search)
- Select search from the Option List (if it appears)
 - Person Search (SOAIDEN)
 - Alternate ID Search (GUIALTI)

Query for a Person

- Key in known criteria (Last Name, First Name) in the appropriate field
- Use the % wildcard in any position (Ha%). (Always use the % when including a middle name or initial)
- Click (Execute Query) to retrieve match(s)

No Results

- The Auto Hint/Status Line says: "Query caused no records to be retrieved. Re-enter."
- Click (Cancel Query)
- Click 🕮 (Enter Query) to remove criteria from field
- Enter new criteria and click (Execute Query)

Select a Record

- If necessary use the \checkmark (Down Arrow) or \uparrow (Up Arrow) key to position the cursor in the appropriate line
- Click 🔲 (Select)
 - The Key Block on the calling form will populate and the Query form will close

Move to Information Block

- To view record data, click (Next Block) to move from the **Key Block** to the **Information Block** of the form
- To return to the Key Block to select search for another record. click (Rollback)

Exit Query form without Retrieving a Record

• Click (Exit) **twice** to close form and return to the calling form

Banner Main Menu

Elle Edit Options Block Item Becord Query Tools Help		ORACL
	X	
General Menu GUAGMNU 8.4.2 (BANPROD) - Thursday, March 8, 2012 - Last login Wednesday, March 7, 20	12 00:53:36 A	M 28
Go To Welcome, Cindy Tate.	roducts: 💽	Menu Site Map Help Center
Banner Banner Object Search		My Links
Student [-STODENT]		
a dvancement [*ALUMNI] Field Human Resources [*HR8]		Check Banner Messages
Advancement [*ALUMNI] Field		Check Banner Messages Personal Link 1 Personal Link 2

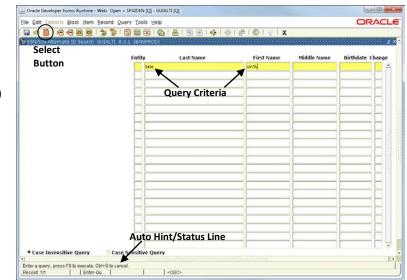
General Personal Identification SPAIDEN



Alternate ID Search GUIALTI

ate ID Sev

Cancel



Person Search SOAIDEN



Person search 504	IDEN 8.5.1 (BANPROD)		(@		
Select	Query Butt	CONS First Name	Middle Name	Cha Birth Date Indi	inge cator Type T
800	Tate	Cindy	L	-NOV-	
	<u>.</u>				

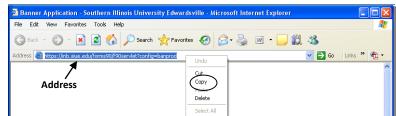
Extract Banner Data into Excel

Internet Explorer Setup

- Open Internet Explorer
- Open Banner Production
 - Two new windows will open:
 - Banner Application window runs in the background
 - o Oracle Devoloper Forms window Banner forms
- Do not logon to Banner at this time
- From the task bar (bottom of screen), select **Banner Application** window
- Copy Banner web address
 - Highlight the Address
 - Click the right mouse button
 - Select Copy



Banner Application Window



• Select Tools (Menu bar), Internet Options....

IE Tools Menu

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	Windows Update		
	Windows Messenger		
	Diagnose Connection Problems Sun Java Console		
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Internet Options Security Tab

- Click on Security tab
- Click on Local intranet icon
- Click Sites...



Internet Options				
General Security Privacy Content Connections Programs Advanced				
Select a Web content zone to specify its security settings.				
Internet Incal intranet Trusted sites Restricted sites				
Local intranet				
This zone contains all Web sites that are on your organization's intranet.				
Security level for this zone				
Custom Custom settings. - To change the settings, click Custom Level. - To use the recommended settings, click Default Level.				
Custom Level Default Level				
OK Cancel Apply				

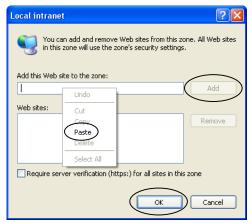
Click Advanced...

- With cursor in **Add this Web site to the zone:** field, click the right mouse button
- Select Paste
- Click Add
- Web site will be listed in Web sites: field
- Click OK three times





Local Intranet Web Sites



- Select Tools (Menu bar), Pop-up Blocker
- Select Turn Off Pop-up Blocker
- If Yahoo or Google toolbars have been installed, these should be uninstalled for best results

Banner Applications Window

File Edit View Favorites	rools Help				
G Back - O - 💌	Mail and News Pop-up Blocker Manage Add-ons Synchronize	Turn Off Pop-up Blocker Pop-up Blocker Settings) 🐔 🦓	Links »	 •
-	Windows Update Windows Messenger Diagnose Connection Problems Sun Java Console Internet Options				



Banner Setup

- From the task bar (bottom of screen), select **Oracle Developer** window
- Logon to Banner
- Verify that Include Header Row in Data Extract has been checked in **Preferences** (Page 7)

Extract Data

- Retrieve data to be extracted
- Click Help (Menu bar), Extract Data with Key or Extract Data No Key
 - Extract Data with Key includes information entered into the Key Block
 - Does not extract field names (column headings). i.e.; First column is University ID, then Last Name, First Name, etc
- Select 'Open in Excel' if asked
- Save file to PC
 - Work with file as needed outside of Banner

NOTE: EXTRACT DOES NOT WORK. If after turning off pop-up blockers and adding the web site to the Intranet zone and cannot extract to Excel, call the Help Desk at ext. 5500 for further assistance. Remember, not all data can be extracted from Banner (the menu option will not be active from the Help menu).

Student Extract Examples

Class Roster SFASLST

- Key in SFASLST in the Object Search Field (Go To ...) on Banner Main Menu
 - Press Enter
- Term Key in term
- Key in course reference number in the **CRN** field if known
 - Search for CRN
 - Click └─ (Search) for CRN and select Search for Sections (SFQSECM)
 - Click in the **Subject** field and key in subject
 - \circ Click in the **Section** field and key in '>0' (zero sections are not used to schedule classes)
 - Key in other search criteria as needed and click (Execute Query)
 - o Double click on appropriate section to close query and populate CRN on SFASLST
- Click 📴 (Next Block) to view class list
- Click Help (Menu bar), Extract Data with Key or Extract Data No Key
 - If list includes waitlisted students, will get a warning message for each. Click until message no longer appears
- Select 'Open in Excel' if asked
- Save file to PC
- Click (Rollback) to return to the Key Block (to search for another class list)
- Click X (Exit) to close form and return to Banner Main Menu

Course Enrollment

- Key in SSASECQ in the Object Search Field (Go To...) on the Banner Main Menu
 - Press Enter
 - By opening a query form directly from the Banner Main Menu will not be able to view information about a course other than the information that appears on the query form
- Enter search criteria
 - Term Enter term
 - Subject Enter subject
 - **Course** If not entered, query will return all courses
 - o Leave blank if searching for all courses for a subject
 - o Enter a course number if searching for specific course

Task Bar

🖀 Banner Enterprise Inf... 🛛 🖉 Banner Application - ... 🖉 🌺 Oracle Developer For...

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- o Enter '#%' to look for courses within a specific level Examples: 2% returns all 200 level courses, 5% returns all 500 level courses
- Use '<', '>', '=' or a combination to search for courses within a range of levels Examples: >=200 returns all courses 200 and above, <200 will return all courses 199 and below, <>210 will return all courses except 210
- Section Will not use '0' (zero) section for registration
 - o Enter '>0'
 - o If left blank, '0' sections will be returned in the results
- Section Status Enter 'A' to query only Active sections
- Enrollment: Actual Enter '>0' to query sections that have students registered
- Enrollment: = Enter '>0' to query sections that have available seats
- Waitlist: Actual Enter '>0' to query sections with students on the waitlist
- Waitlist: = Enter '>0' to query sections with available waitlist seats
- Click (Execute Query)
- Click Help (Menu bar), Extract Data with Key or Extract Data No Key
- Select 'Open in Excel' if asked
- Save file to PC

- Click 🖾 (Cancel Query) followed by clicking 🕮 (Enter Query) to search for another subject and repeat process
- Click 🗶 (Exit) to close form and return to Banner Main Menu

HR Extract Example:

PHIETIM list of all employees for a specific Payroll ID and Payroll Number.

- Key in PHATIME in the Object Search Field (Go To ...) on Banner Main Menu
 - Press Enter
- In the Key block enter the appropriate information:
 - Organization Key in number
 - Transaction Status Select All (Except not Started)
 - Payroll ID Key in BW for Bi-weekly or ST for Student
 - Payroll Number Key in payroll number for time entry information to extract to Excel
 - o If the date and time for entering and approving the payroll has passed, will receive a warning on the Auto Hint/Status line that pay period selected is not open for time entry
- Click (Next Block) to move to Jobs Information Block
- Click 🖾 (Search) from Jobs information block (between ID and Last Name) to open Web/Department Employee Time Inquiry PHIETIM
- Click Help (Menu bar), Extract Data with Key or Extract Data No Key
- Select 'Open in Excel' if asked
- Save file to PC
- Click X to close PHIETIM and return to PHATIME
- Click (Rollback) to return to the Key Block (to search for another payroll list)
- Click 🗶 (Exit) to close form and return to Banner Main Menu

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Exit

Exit Forms

Click or on form(s) until Banner Main Menu appears

Exit Banner and Close Internet Native Banner Window

- Click (Exit) on Banner Main Menu or click (Exit) on the Toolbar
- Concel Developer Forms Runtime Web: Open > SPADDN [Q]

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Banner Main Menu

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🗎 My Banner		My Links
Banner		
Student [*ST	UDENT]	
Advancemen	it [*ALUMNI]	Check Banner Messages
🔲 Human Reso	urces [*HR8]	Lange and the second
😑 Financial Aid	[*RESOURCE]	Personal Link 1
🔜 General [*GE	NERAL]	Personal Link 2
🗎 Banner Secu	rity [*SECURITY]	Personal Link 3
A. A	المامين بالطبية بمنت فليه مام لياريل الراب اللي مايلية مسارحة الروح والمعا	

 Click (Exit) to close SIUE Internet Native Banner window

SIUE Internet Native Banner Window

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Google -	G Search	🔹 🚿 🔊 49 blocke	d 🧳 Check	🝷 💐 AutoLink	• »	🌀 SnagIt 🛛 🗎

Additional Resources

Phone Numbers

- ITS Help Desk: 650-5500
- Human Resources: 650-2190
- Student Service Center: 650-2080
- Registrar's Office: 650-3770

Web Sites

- Banner Production: <u>http://www.siue.edu/its/banner</u>
- Banner FAQ's: <u>http://www.siue.edu/its/banner/faq.shtml</u>
- Banner Training: <u>http://www.siue.edu/its/banner/banner_training.shtml</u>
- Human Resources: <u>http://www.siue.edu/humanresources</u>
- Registrar's Office: <u>http://www.siue.edu/registrar</u>
- ITS: <u>http://www.siue.edu/its</u>
- ITS e-ID Maintenance: <u>http://www.siue.edu/eid</u>
- ITS Training: <u>http://www.siue.edu/its/fac_staff/training</u>

Email Addresses

- Production Control: <u>oitaccts@siue.edu</u>
 - Locked Banner account
 - Banner access
- ITS Help Desk: <u>help@siue.edu</u>