

Navigating Banner

Banner 8 User Guide

January 2011



Navigating Banner

Contents

1. THE BANNER TOOLBAR	3
2. ACCESSING FORMS	4
3. SEARCHING FOR FORMS	5
4. NAVIGATING IN FORMS	8
5. SEARCHING IN FORMS	10
6. THE OPTIONS MENU	12
7. ROLLBACK	13

Refer to this tutorial to learn how to Navigate Banner.

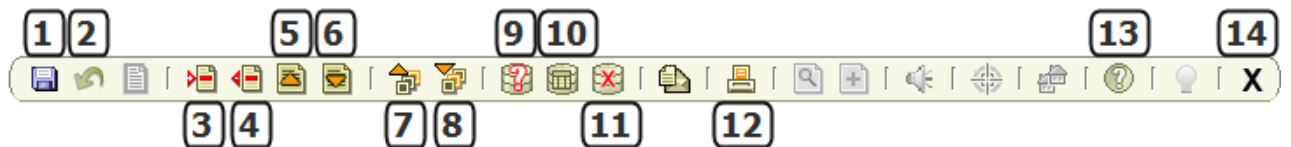
Pre-requisites to this tutorial:

- Introduction to Banner tutorial

1. THE BANNER TOOLBAR

Before navigating through Banner forms, it's important to understand the different Banner commands and which icons from the Toolbar to use for them. The Toolbar is always visible in Banner, from the Main Menu through to any forms you open.

1.1. The Toolbar:



1 – *Save* – commits any changes made to data in a form.

2 – *Rollback* – returns you to the Key Block from wherever you are in the form. If you've made changes you haven't yet saved, you will be prompted to save before Rollback.

3 – *Insert Record* – inserts a blank Record into the current Block, ready to enter data.

4 – *Remove Record* – completely deletes the currently selected Record.

5 – *Previous Record* – selects the previous Record within the current Block.

6 – *Next Record* – selects the next Record within the current Block.

7 – *Previous Block* – moves up to the previous Block on a form (also known as 'blocking up').

8 – *Next Block* – moves down to the next Block on a form (also known as 'blocking down').

9 – *Enter Query* – puts a form into Query mode, or resets a Query form for another search.

10 – *Execute Query* – runs the search query based on the entered criteria.

11 – *Cancel Query* – takes a form out of Query mode.

12 – *Print Screen* – sends a screenshot of your Banner screen to the default printer.

13 – *Help* – opens the SunGard Banner Help pages.

14 – *Close* – closes the current form; from the Main Menu, exits Banner.

2. ACCESSING FORMS

- 2.1. Accessing Banner forms is done in two ways – either through selecting the form from the Menu Tree on the Banner Main Menu, or entering the form name directly into the Go To Bar.
- 2.2. **The Menu Tree** was explored in the ‘Introduction to Banner’ tutorial. To select a form, double-click the folder(s) containing the form and double-click the form to navigate to it. This method requires a knowledge of which folders contain the forms you need.

For example, to navigate to **SPAIDEN**, you would need to double-click the *Student* folder (Figure 1, Box 1), double-click the *General Person* folder (Figure 1, Box 2) and then double-click the entry for **SPAIDEN** (Figure 1, Box 3).

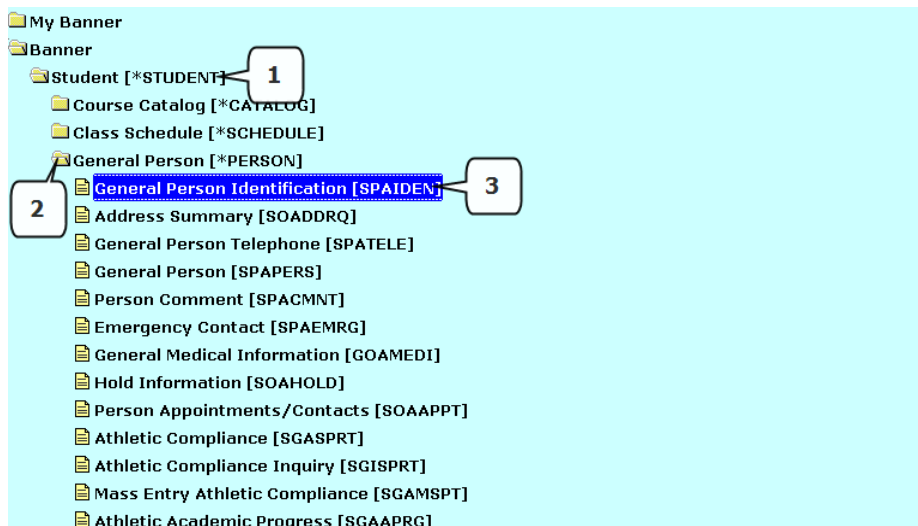


Figure 1

- 2.3. **The Go To Bar** is often a quicker way to navigate to a form, but it requires you to know the form name and it must be spelt correctly. To navigate to **SPAIDEN** you would just need to enter SPAIDEN into the Go To Bar from the Main Menu (Figure 2, Box 1) and hit <Return> on the keyboard.

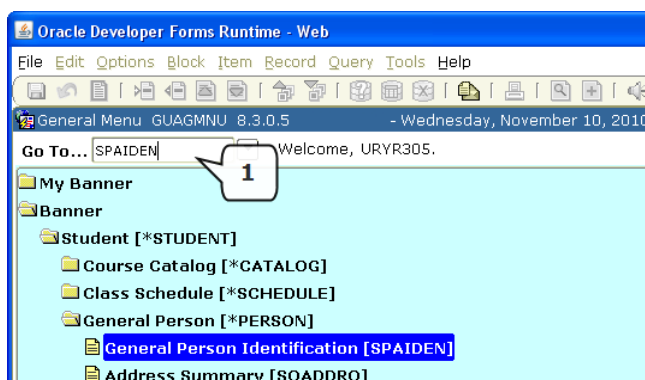


Figure 2

- 2.4. Recently opened forms from your current Banner session (i.e. since you logged on) can also be quickly re-accessed through the Go To Bar, without needing to type the form name in again. Just click into the Go To Bar, then use the arrow keys (up and down) to cycle through the forms you have recently accessed – then just hit <Return> again to open them.
- 2.5. Similarly, you can view a list of up to 10 forms you have recently accessed via the File menu. Click on File (Figure 3, Box 1), and then click on the form from the drop-down menu that appears (Figure 3, Box 2) to open it. This will be cleared when you log out.

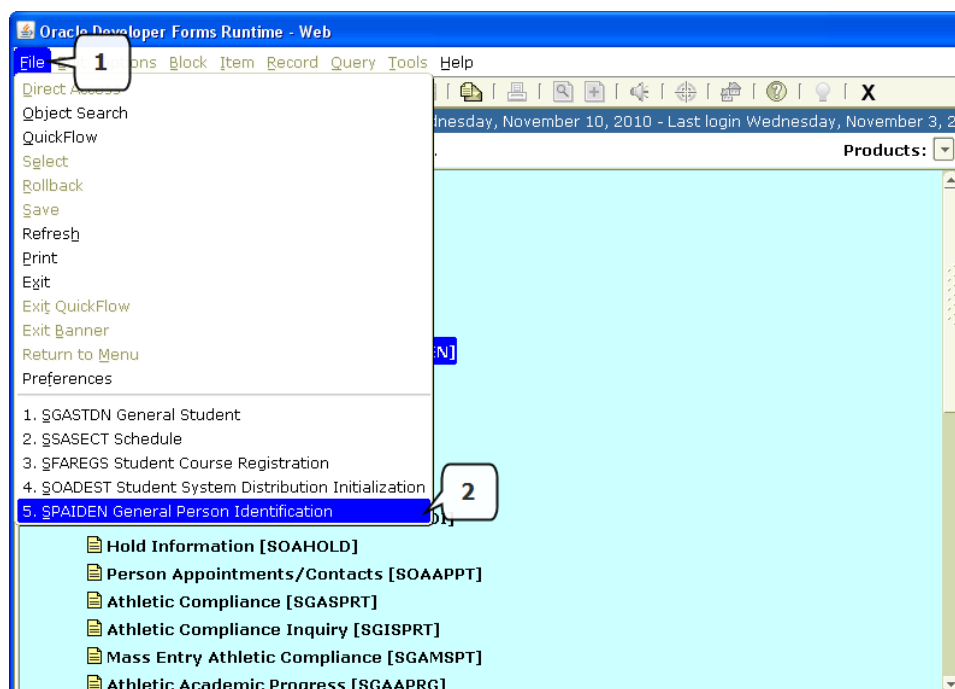


Figure 3

3. SEARCHING FOR FORMS

If you cannot remember the name of the form you want, and you don't know which folder on the Menu Tree contains it, you will need to search for it.

- 3.1. Using Wildcards in searches are useful as they can represent any part of the search term that you don't know. So, if you know what a form name starts with but don't know the end, you can still search for it using a Wildcard.

Recognised Banner Wildcards:

- % (percentage symbol) = any number of unknown characters
- _ (underscore) = one unknown character

- 3.2. Searching for a form can be done either in the Go To Bar, or via a dedicated Search Query form. The Go To Bar search is more straightforward, but the Search Query allows you to also search for a form based on the full description.

3.3. Go To Bar Search – click into the Go To Bar. Enter the letters of the form name that you do know, and use Wildcards to represent any 'unknowns', for example:

- S% - will list any forms beginning with 'S'
- %IDEN – will list any forms ending 'IDEN'
- SPA_DEN – lists any forms starting 'SPA' and ending 'DEN'
- _P% - lists any forms where 'P' is the second letter

3.4. Example: if you were looking for **SPAIDEN**, and couldn't remember the spelling but knew it started with 'SPA', enter this in the Go To Bar followed by the % Wildcard (Figure 4, Box 1). When you hit <Return> a pick list window opens, from which you can select the form you want (Figure 4, Box 2).

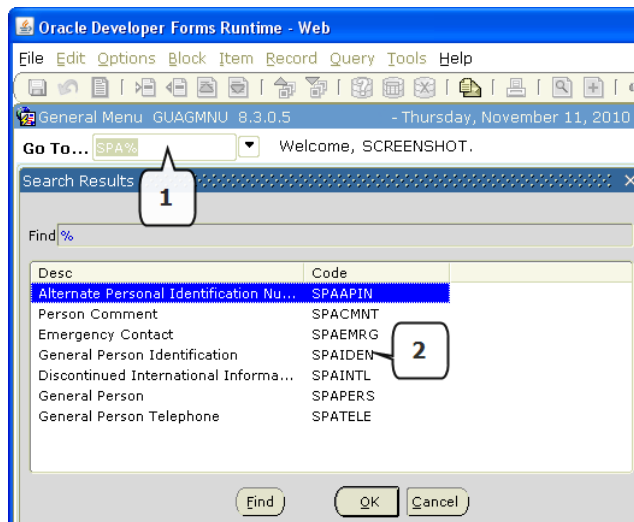


Figure 4

3.5. Search Query Form (GUIOBJJS) – to access the Search Query form, click the drop-down arrow for the Go To Bar, or double-click within the Go To Bar. This will open the 'Object Search' form **GUIOBJJS** (you can also navigate to it by typing the form name, but clicking is quicker!). Enter your search criteria into the *Name* field (Figure 5, Box 1) if searching by form name, or into the *Description* field (Figure 5, Box 2) if searching by overall description, or a combination of both.

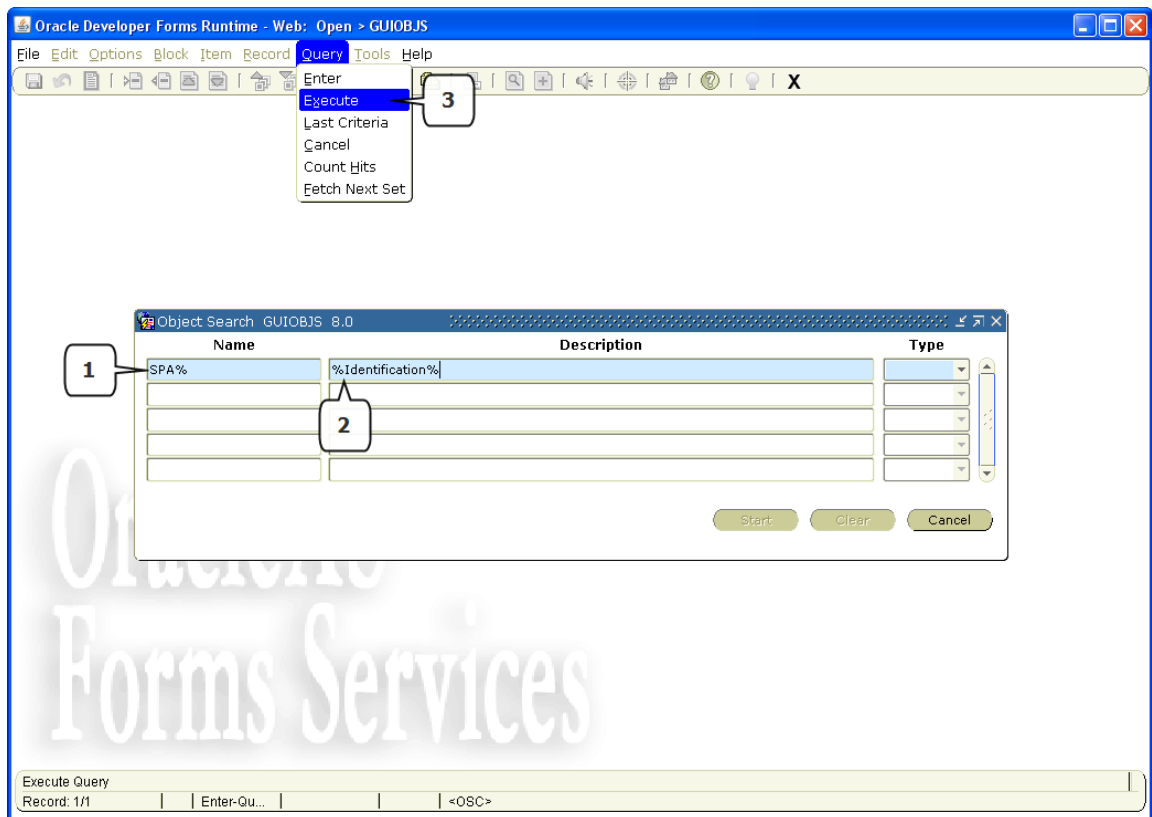


Figure 5

- 3.6. Once you've entered the search criteria, click *Query* then *Execute* from the File menu (Figure 5, Box 3) to return your results, then double-click on the form to open it (Figure 6).

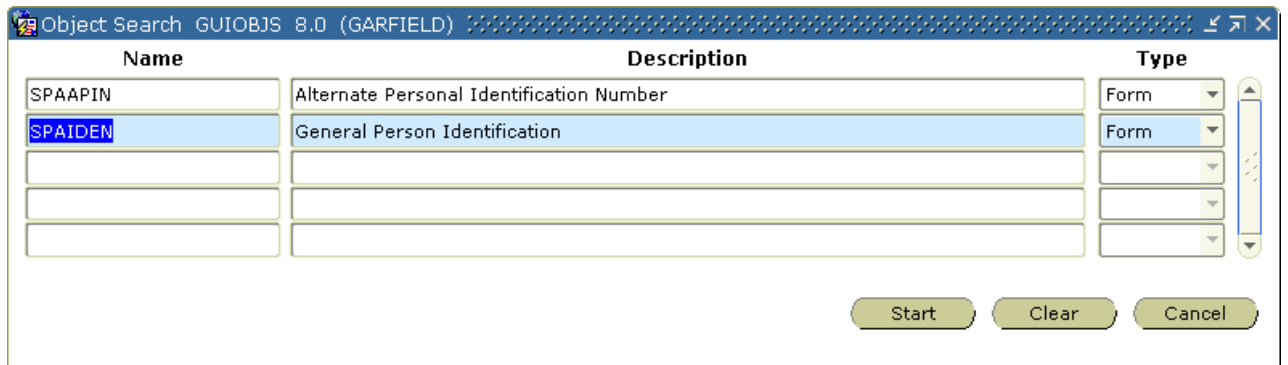


Figure 6

- 3.7. If you clicked the drop-down arrow for the Go To Bar by mistake and didn't mean to initiate a search, simply click the Close Form icon **X** twice to exit and return to the main menu screen.

4. NAVIGATING IN FORMS

4.1. As described in the 'Introduction to Banner' tutorial, Banner forms are made up of Blocks. When the form opens, you start in the Key Block. If the form is student-related, you will usually need to enter a student ID, but other key fields may be required, e.g. Term. Once you have entered the required fields, you can *Next Block* to the Information Blocks.

4.2. Moving from block to block:

You can move up or down through the blocks on a form. Use the *Next Block* icon on the Toolbar (Figure 7, Box 1) to move down ('blocking down') and the *Previous Block* icon (Figure 7, Box 2) to move up ('blocking up').

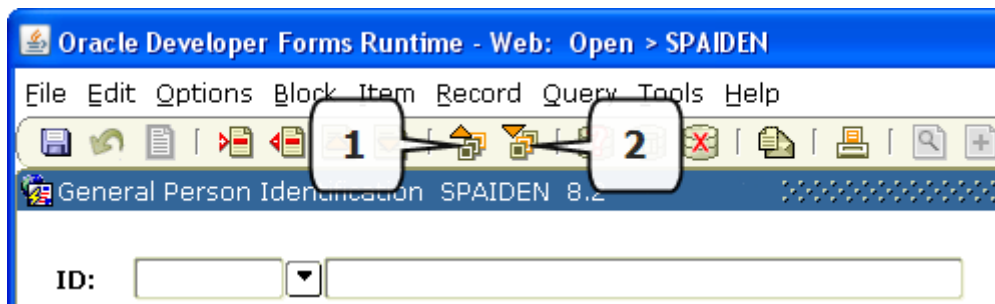


Figure 7

4.3. The first time you access a form, it's a good idea to block your way through the entire form to familiarise yourself with the layout, what data is available on each of the Information Blocks, and how many there are in total. Depending on the form, blocking down may take you to the next block on the screen, or the block may present on a new screen (though the Key Block will always be visible at the top).

4.4. Moving from field to field:

When you move from one block to the next, the cursor will default to a particular field. To move from this field to the next (e.g. Figure 8, Box 1 to Box 2), you can press <Tab> on the keyboard, and to move back to a previous field, use <Shift & Tab>. To move into a non-consecutive field within the same block, you can also just click directly into the field. Some forms will allow you to click down to a field outside your current block, but some will require you to *Block Down* before you can select a field in that block.

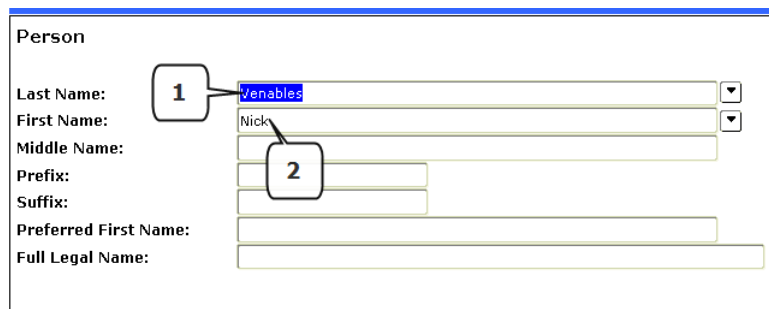
The image shows a screenshot of a form titled "Person". The form contains several input fields with labels: "Last Name:", "First Name:", "Middle Name:", "Prefix:", "Suffix:", "Preferred First Name:", and "Full Legal Name:". The "Last Name" field contains the text "Venables" and has a dropdown arrow on its right. The "First Name" field contains the text "Nick" and also has a dropdown arrow. Two callout boxes are present: Box 1 points to the "Last Name" field, and Box 2 points to the "Prefix" field.

Figure 8

4.5. **Moving from record to record:**

In a block that contains multiple records (e.g. E-mail addresses in the E-mail block of **SPAIDEN**) moving from one record to the next can be done using the *Previous Record* and *Next Record* icons (Figure 9, Box 1 & 2), or using the *Record* drop-down from the File menu (Figure 9, Box 3). Alternatively you can use the arrow keys on the keyboard to move up and down records.

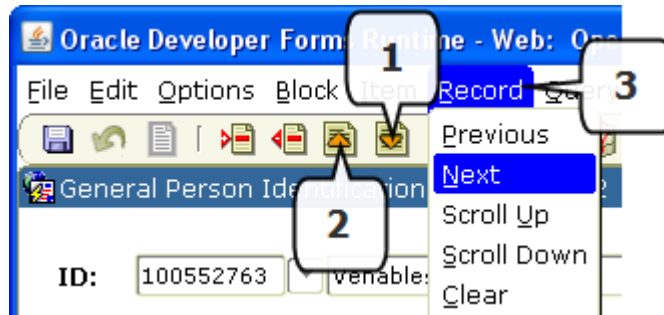


Figure 9

4.6. **Moving from tab to tab:**

Many Banner forms feature tabs along the bottom of the Key Block that allow you to quickly navigate through the form without needing to block up/down through the individual blocks. Click a tab (e.g. Figure 10, Box 1) to navigate directly to it – tabs can also be cycled through by blocking up or down.

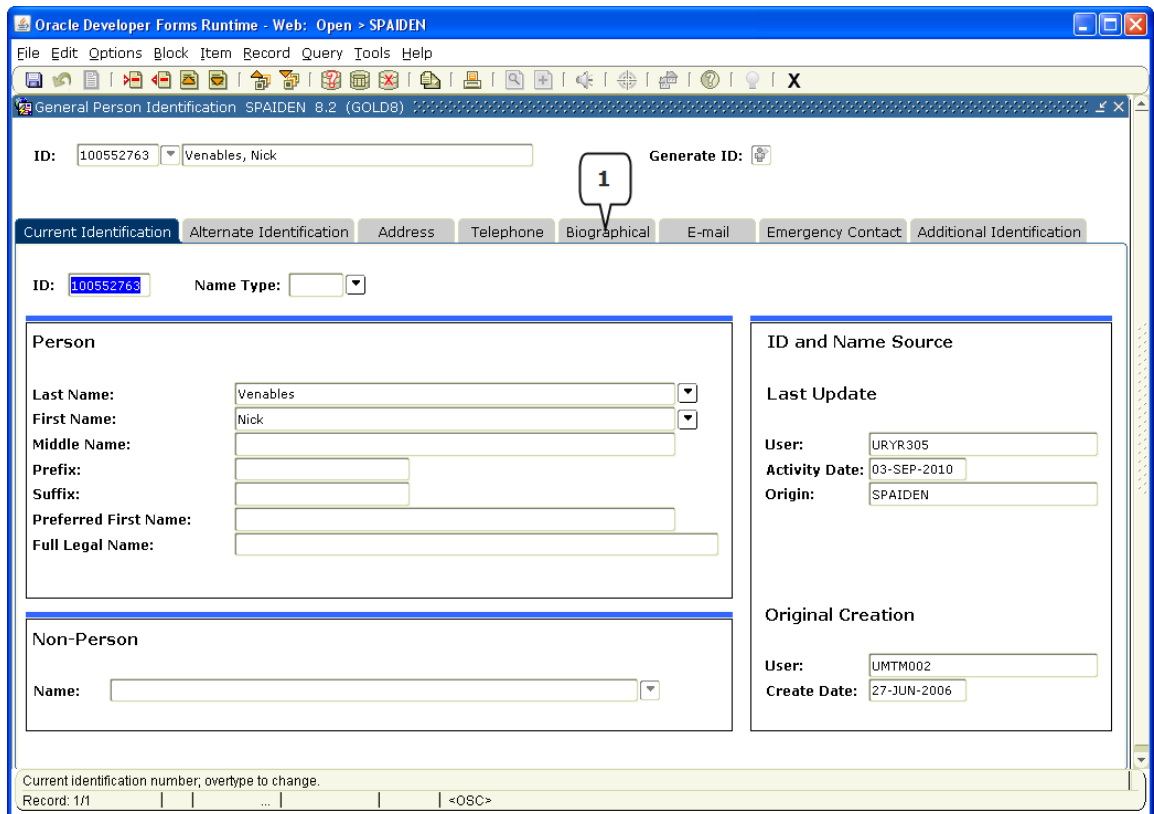


Figure 10

5. SEARCHING IN FORMS

- 5.1. Some fields in Banner allow you to search for the data to input. Fields that allow a search to be performed have a drop-down arrow next to them (Figure 11, Box 1).

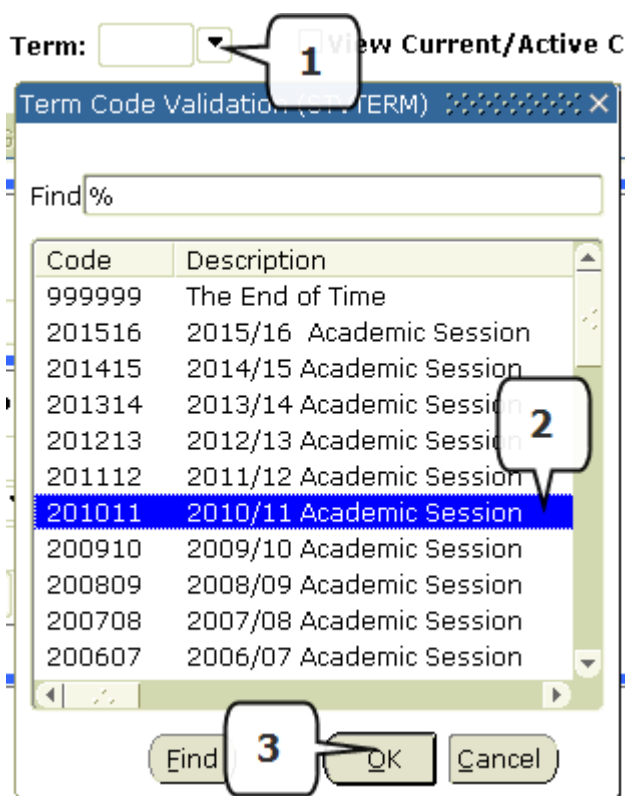


Figure 11

- 5.2. One of two search options will be initiated when you click a drop-down arrow. The first, and most straightforward, is known as a 'picklist'. This is a list of all the possible values that can be entered into the field, and has been predefined so that it is not possible to enter anything not included in the list. It is therefore just a matter of selecting the appropriate value from the picklist (Figure 11, Box 2) and clicking OK (Figure 11, Box 3) or just double-clicking the value.
- 5.3. The second search option is where a custom search must be performed. This occurs for fields that could be populated with a large number of possible values, so a picklist would not be appropriate (it would be too long). Instead, on clicking the drop-down arrow (Figure 12, Box 1), an Option List will appear (Figure 12, Box 2), giving you the choice to open a Search Query Form (e.g. the Person Search form, Figure 12, Box 3).

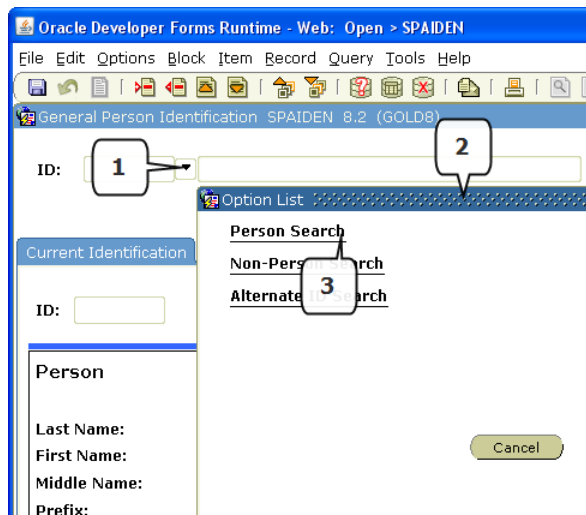


Figure 12

- 5.4. When the Search Query form opens (e.g. SOAIDEN for Person Search, Figure 13) there will be blank fields – enter your search criteria into the fields, using wildcards if necessary. You do not need to enter something in every field – however, the more detail you provide as part of your search criteria, the more refined your search. Once you have entered your search criteria, bring back the results by clicking the Execute Query icon (Figure 13, Box 1).

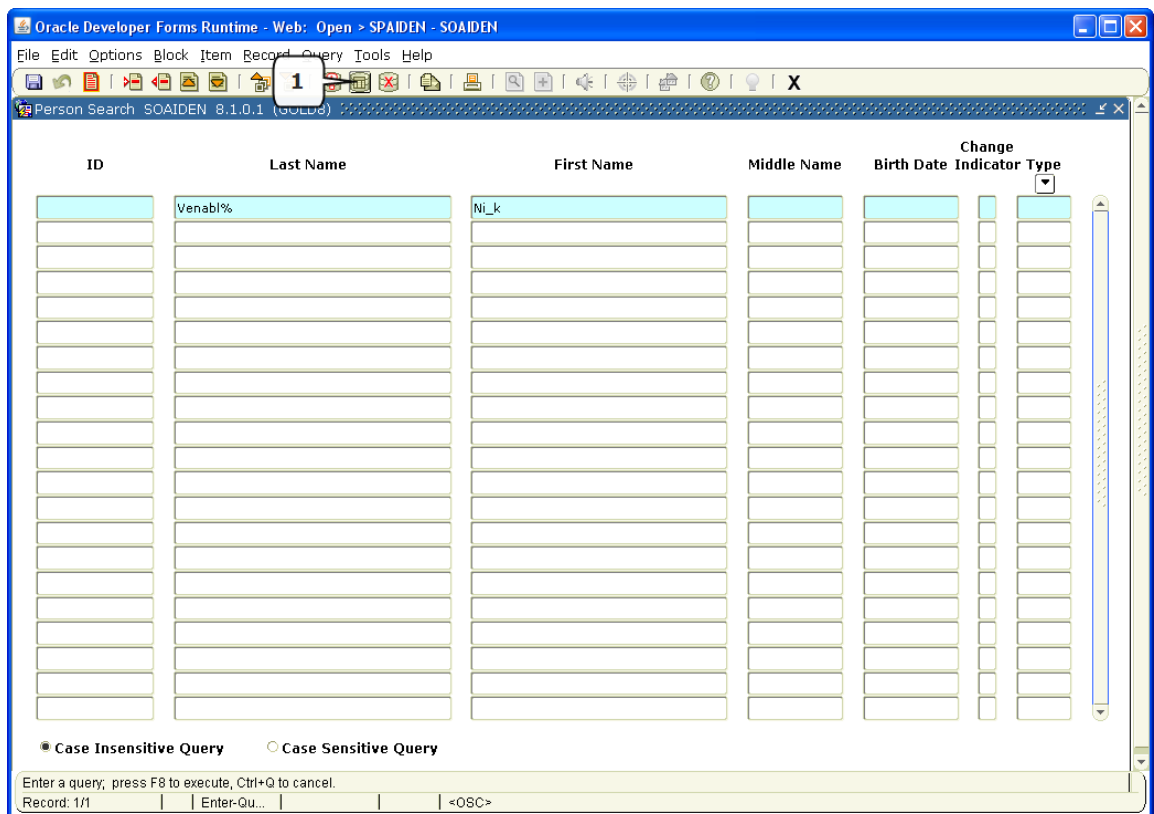


Figure 13

- 5.5. Some forms may open already populated with all the data. If you wish to find a particular record or value, you can put the form into Search Query mode by

clicking the Enter Query icon (Figure 14, Box 1) then enter your search criteria and execute the query, as if the form were a Search Query form.

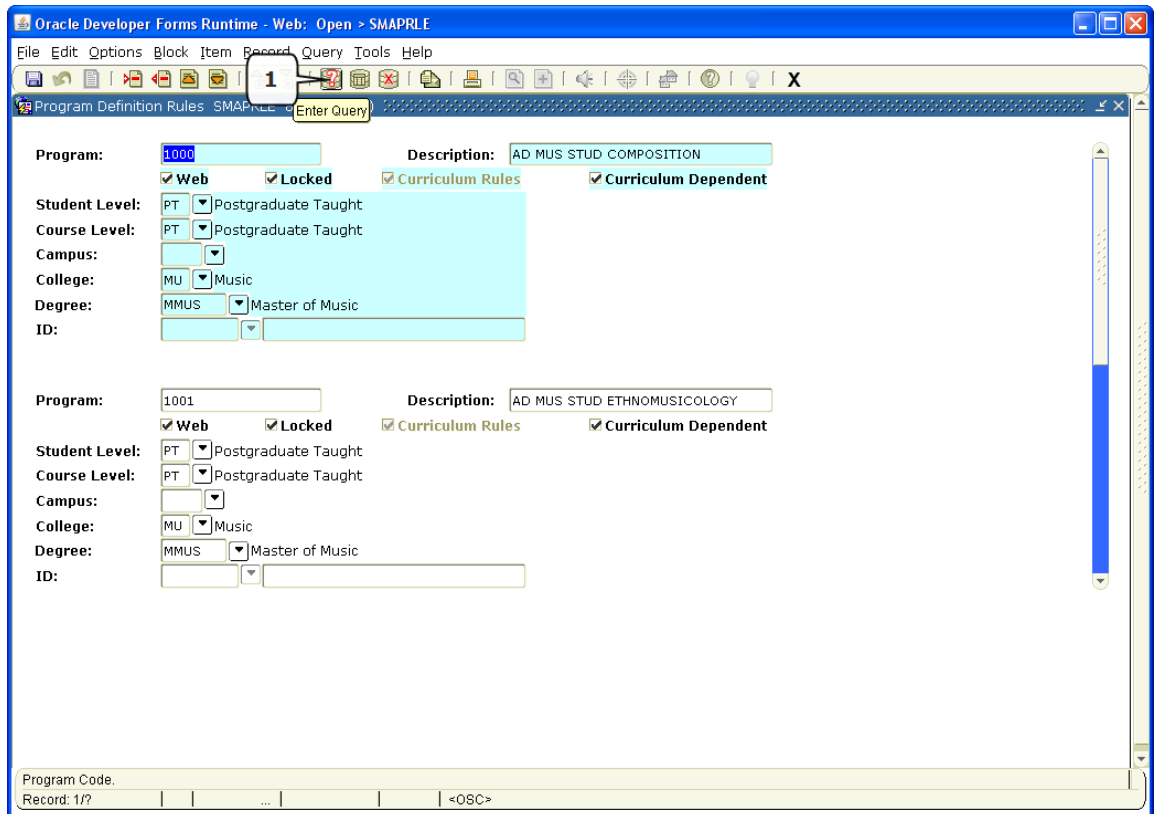


Figure 14

6. THE OPTIONS MENU

Within a form, the Options Menu can be accessed from the Menu bar. The navigation options will vary depending on the form you're in – some options will take you to other blocks within the current form (Figure 15, Box 1), and some will take you to a different, but related form (Figure 15, Box 2).

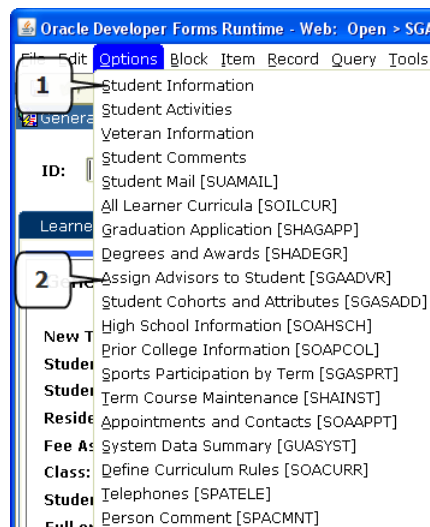


Figure 15

7. ROLLBACK

Rollback is a feature of Banner that lets you return to the Key Block in the current form. This is necessary when you have finished using one record and need to return to the Key Block, to enter details for a different record (e.g. different student).

- 7.1. *Rollback* (Figure 16, Box 1) returns you to the Key Block – if you have made any changes to the data in the current form prior to Rollback, and have not yet saved, when clicking the icon you will be prompted whether you wish to Save the changes before rolling back.

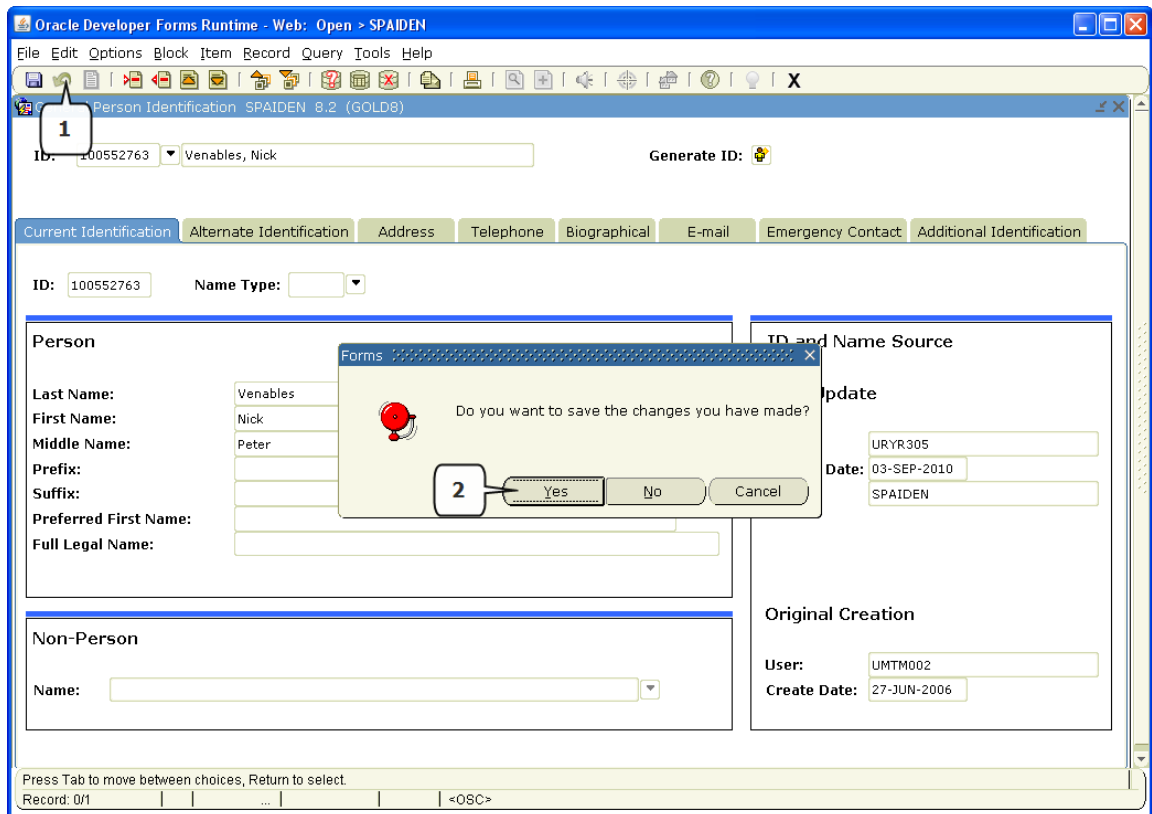


Figure 16

- 7.2. If you forgot to save prior to clicking Rollback, you must click 'Yes' (Figure 16, Box 2) or your changes will be lost.
- 7.3. *Rollback* isn't an 'undo' option but if you do make a mistake in Banner, click *Rollback* and answer 'No' to saving the changes. The mistake will not be saved and you can block down again from the Key Block and update the record correctly.