Internet Native Banner (INB) And WebXtender General Navigation Training

Banner[®] by Ellucian

> Center for Instruction and Technology Information Technology Services University of San Francisco

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Introduction to Banner Tutorial

Audience: Those who need to do basic navigation in Banner (not product specific)

Banner is the name of the product-line developed by SunGard Higher Education to support administrative work in educational institutions. The Banner product is based on the Oracle *relational database management system*. Oracle determines data access according to *security classes* that reflect job responsibilities.

You have been assigned a personal Oracle username and password that will serve as an *electronic signature* in the Banner environment.

Because Banner is database driven, there are different database instances depending on which Banner environment you are going to work in. Key examples:

- PROD: our production environment, security enforced.
- PPRD: a current prototyping environment for HR, Finance, Student, security enforced.
- TRNG: a Banner training database using bogus seed data. Wide-open.

How Do I Obtain Access To Banner?

- 1. The first step is to attend this Banner General Navigation training to learn how to navigate around Internet Native Banner (INB). These skills are applicable in all systems you will be using (Student, HR, Advancement, Finance) in Banner.
- 2. The next step is request the live production (PROD) account through your supervisor. It is important to check the information regarding this request on the Banner security web page found at:

https://intraweb.usfca.edu/its/erp/usf/security/

You will need to login with your USF connect username and password/PIN to access the Banner Security page. The link, "Administrative Systems Suite Access Request Page", is on this page. If your supervisor does not know the forms to request, then they can enter the functions used in their job. Remember that all users need to finish the tutorials and pass the quizzes for USF's Information Security Policy course on Blackboard. Information regarding the policy requirements can be found on the Banner security page and through the Banner security officer after the request has been made.

Logging into Banner

When you receive your PROD Banner account, you will be able to access Banner via Single Sign-on within USFconnect.

For this training we are using the TRNG instance.

- 1. Go to: http://hydra.usfca.edu:9900.
- 2. Click on the Training Database "TRNG" line under the INB section.

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Image: Antiperiod of the second s	Coogle	۹ 🏠 🍕
http://hydra.usfca.edu:9900/		=
†USF Univers	ity of San Francisco Jesuit Education	
Internet Native Banner (INB)	Plus Data Migration & Alpha Retirement	
Production Database [PROD]	Scholarship Designation Workflow	
Daily Production Clone Database [DPRC8 Banner & Production Platabase [DPRD8] Banner & Developer Database [DEVO8] Training Database [TRNG8] Banner & Temp Test Database [TEMP8]	<u>Business Intelligence RFP</u> (Basecamp)	
Self-Service Banner (SSB) Production Database [PROD] Daily Production Clone Database [DPRC8 Banner 8 PreProd Database [PPRD8]	Conversion Toolkits	
Banner 8 Dev Database [DEVO8] Banner 8 Training Database [TRNG8]		
Banner 8 Temp Test Database [TEMP8]	Document Management System	
	WebXtender [PROD] Test WebXtender [PPRD8]	
Done		A •

3. It may take a moment for the Oracle *logon* box to appear. When it does, enter your personal username and assigned password for the training database. There is no need to enter a database name.

Username:	
Password:	
Database:	

4. Press the Enter key or click on Connect.

Note: When you have an INB session open, there are actually two browser windows open:

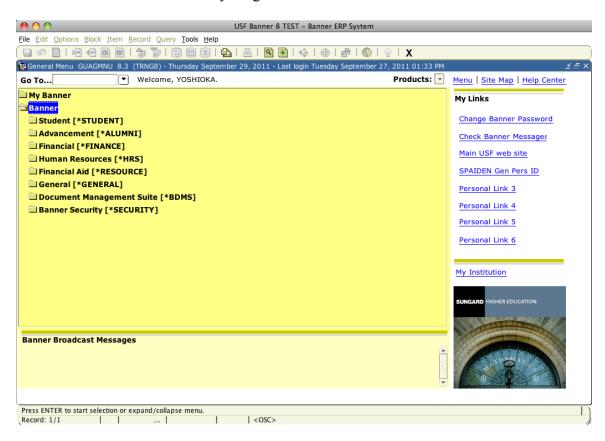
- 1. Oracle Developer Forms Runtime (the actual INB application)
- 2. Oracle Application Server Forms Services (some Oracle thing) as seen here.

Both are required. If you close #2 it closes the whole INB session.

Working within Banner

The first form displayed after a successful logon is called the *General Menu (GUAGMNU)*. Banner forms are very similar to a standard "Windows" environment – everything is menu-driven.





My Links

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

The My Links section of the GUAGMNU form allows the user to customize what links they might want to have show up for easy linking action. For example, the Financial Aid INB users might choose to have a link going directly to a specific federal government financial aid site they use frequently.

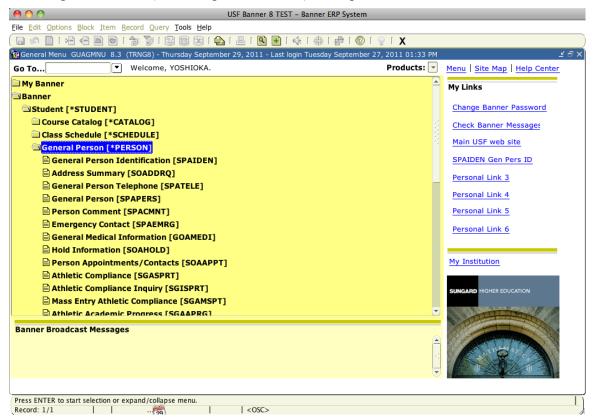
Information Technology Services University of San Francisco 2/5/15

Banner Broadcast Messages

Banner Broadcast Messages 22-MAY-2007 Testing BROADCAST message This area of the GUAGMNU form allows similar messages that go out in Plus indicating screens are going down at a certain time or if there is a problem.

The Main Window Area

You can navigate within the menus listed in the main window area by double-clicking the menus to reveal their contents to access Banner forms as seen below. Double clicking on the form (for example SPAIDEN) will open the form.



Form is the Oracle term for one or more connected screens; each form name is also referred to as an *object*. Banner forms are "online documents" used to enter and/or look up information.

Form Naming Conventions

All forms have a 7-character name. When people start pronouncing the form name as if it were a word, then they are truly speaking "Bannerease". Yes, it will sound funny, but not as funny as when you start talking that way! See attached **Naming Convention** document for details.

Help Links and Site Map

There are several ways to get help information for Banner.

On the main menu (GUAGMNU), above the *My Links* section on the right of the window there are two useful links: Site Map and Help Center. The Site Map shows an overview of all the sections that are available in the main menu. Help Center takes you to help information related to the various product areas.

Go To Y Welcome, YOSHIOKA. Products: Menu Site Map Help Center My Banner Advancement Individual Advancement Organization General Person Advancement Administration Electronic Approvals Seneral Das Schedul Submission Population Selection Canse Catalog Class Schedule Gass Schedule Advancement and Hous General Person Solicitor Organization Campaign Human Resources Applicant Administration Employment Administration Employment Administration Employment Editions Administration General International Management Benefit / Deduction Administration General IX Management Heatin and Safety Administration General IX Management Heatin and Safety Administration Employment Services Bugdet Time Entry and Payroll Processin Registration Advancement Self-Service External Data Load and External Advancement Self-Service External Data Load and External Advancement Self-Service External Data Load and Processin Parchaing and Progreg General Ledger Stores Inventory Purchasing and Progreg General Ledger Stores Inventory Purchasing and Prosition Control Fixed Asset Financcial Parcell Management Accounts Payable Budget and Position Control Fixed Asset Financcial Add Applicant Processing Parchaing and Prosition Control Fixed Asset Management Electronic Data Exchange Protokal Management Electronic Data Exchange Protokal Management Electronic Data Exchange Protokal Management Electronic Data Exchange Matriculate to Educate Forder Management Electronic Data Exchange Matriculate to Educate Forder All Process To Enrol Plan to Fund Manu USF web Site Solicitor Organization Committee Stores To Matriculate to Educate Forder Management Electronic Data Exchange Manu USF web Site Solicitor Organizatio Solicitor Organization Commi	ile Edit Options Block Item	Record Query Tools Help			
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Enter the object name: Press LIST for listing					
Enter the object name: Press LKT for listing				۲	
	Enter the object name; Press LIS	ST for listing.			

When you are on a form itself, you can also get help on that specific form by clicking the **? button** located in the tool bar.

File Edit Options Block Item Record Query Tools Help

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🙀 General Person Identification	SPAIDEN 8.2 (TRNG8) 000000000000000000000000000000000000	

Security

Banner security is based on Oracle technology. Security is driven by form access. At the highest level, ITS sets up "Classes" which are comprised of various forms determined by the functional group. For example, Advancement may have a security class for Gift Processors which includes all forms related specifically to gift processing functions. Individual users are then granted access to classes.

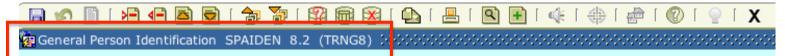
Later we will be able to implement more detailed security access using fine-grained access control (FGAC). An example of FGAC would be hiding the SSN from the Biographical tab on the general person forms, while allowing everything else to show up. This is currently in place in the TRNG environment.

All security access will be given through the product area functional security person.

The Title Bar

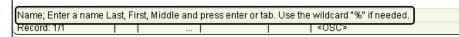
The blue *Title Bar* just below the menus and toolbar icons shows the form name, software release information and the database instance you are working in. for example, when in the SPAIDEN form, the bar reads "General Person Identification SPAIDEN 8.2 (TRNG)".

File Edit Options Block Item Record Query Tools Help



The Status Bar

The *Status Bar* at the bottom of each Banner form window reveals information on a pending function, indications of the data needed in a particular field, and any error messages.



<u>Menu Bars</u>

A *Menu Bar* containing pull-down menus is located at the top of every form. For example, press the Alt key to reach the Menu Bar, or place your mouse over **File**.

- 1. Click on the File menu item, just as you would in any Windows environment.
- 2. Click the File menu again and select Exit to return to the General Menu.
- 3. The File Menu will also display up to 10 most recently viewed forms in the current session at the bottom of the File menu. This is an easy way to navigate back to a recently viewed form.

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File Edit Options	Block	Item	Record	Query	Tools	Help
Direct Access						
Object Search					201	em ber
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1. SPAIDEN General Person Identification					ξI	.E]
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<u>Toolbar</u>

Like standard application interfaces, INB uses *iconic* (picture) buttons on the Toolbar to perform common. A bubble describing the function appears if the cursor is "paused" over an icon – rest your cursor on each picture on the Toolbar, paying particular attention to the icons on the left half of the line. The **Quick-Reference Guide to Banner Toolbar/Keyboard Commands** section shows the common functions on the toolbar.

Different Ways of Accessing a Form

Using its Name:

You reached the General Person Identification [SPAIDEN] form by selecting it from the General Person menu and by selecting it from the File Menu's recently viewed forms listing, but you could also directly access that form by knowing its *object name*.

Return to the General Menu by pressing the "exit" button on the toolbar, by clicking the little "x" in the form window, or using CTRL + Q.

Caution: Supposedly Banner forms do <u>not</u> use the "close" button in the upper right hand corner of the web display! That button will close your Oracle session but may leave you logged into Banner.



In the main GUAGMNU form click in the *Go To* field and key in the letters SPAIDEN and press enter to access the form.

Go To...SPAIDEN

But I don't remember the name of the form!

If you know any portion of the name or description you can still find that form using *wildcard* capabilities. Return to the General Menu by pressing the "exit" button at the top right of the SPAIDEN form.

With the cursor sitting in the Go To field:

1. Either key in a % sign, then IDEN and press Enter or key a set of characters and then the % sign and press Enter.

- 2. A popup results window will come up showing all forms that end with "IDEN". Typing the % sign at the end of a character string will search for forms that begin with that string.
- 3. Scroll down to find the form you want and then double-click to launch the form.

arch Results		
nd %		
Desc	Code	
Finance Person Search	FOIIDEN	
Entity Name/ID Search	FTIIDEN	
User Identification Control	GUAIDEN	
McGill Dup PIDM checking demo	GYAIDEN	
Employee Search Form (Employee	POIIDEN	
Identification	PPAIDEN	
Person Name/ID Search	ROAIDEN	
Person Search	SOAIDEN	
General Person Identification	SPAIDEN	

Blocks

Banner forms contain one or more *blocks* – a block is a framed portion used for a specific function (also called a "window"). If a form contains more than one block, the top one is a *key block* that determines criteria for displaying and/or entering information related to this form.

G O USF Banner 8 TEST – Banner ERP System: Open > S	PAIDEN
File Edit Options Block Item Record Query Tools Help	
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general Person Identification SPAIDEN 8.2 (TRNG8) 3000000000000000000000000000000000000	× 🗉 :::::::::::::::::::::::::::::::::::
ID: Generate ID:	: 🖗
Current Identification Alternate Identification Address Telephone Biographical E-mail E	Emergency Contact Additional Identification
ID: Name Type: 💌	
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:
Non-Person Name:	Original Creation User: Create Date:
ID number; LIST for person; COUNT HITS for non-person; DUP ITEM to generate ID; DUPLICATE RECORD for Alte Record: 1/1 I	ernate ID look-up.

Go back to SPAIDEN (use one of the methods we've already reviewed). In the ID field type in BETH and hit enter or tab. The name Elizabeth M. Forest will show up. The ID field, the name field and Generate ID all are part of the *key block* of the SPAIDEN form. In Banner the ID field for person searches require the Campus Wide ID (CWID) and will not accept the Social Security Number (SSN).

🩀 General	Person Identification	SPAIDEN 7	.3 (TRNG)	000000000000000000000000000000000000000	******				 *******	'₹×
ID: 🗚	00010012 - Forest,	Elizabeth M.				Generate I	D: 🍄			

There are multiple ways to navigate between blocks. We are again using SPAIDEN, but your choice of **one** of these actions will work the same on any Banner form:

• Click the *Next Block* icon on the Toolbar

Eile Edit Options Block Item Re	cord Query Tools Help
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🙀 General Person Identification SI	NDCN 62 (TRNG8) 2002200200020002000200000000000000000

• Select Next from the *Block* pull-down menu

<u>File Edit Options</u>	Block Item Record Que	ery Tools Help
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🙀 General Person I	Previous Clear	2 (TRNG8) 3000000000000000000000000000000000000
ID: 21000950	View Supplemental Data	Generate ID: 🖗

• Simultaneously press the CTRL and Page-Dn keys

Click on the Address tab. The combination of related fields in our current SPAIDEN block (street, city, postal code, etc.) forms an address *record*. There are multiple address records for this individual – we know that because of the scroll bar at the right of the screen, but also because the Auto Hint/Status bar at the bottom left shows **Record: 1**/? on the second line.

	tem Record Query Tools Help E 1 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2				0000 ≚ ×
ID: 210009505 Gra	aber, Cynthia	Gen	erate ID: 🔮		
Current Identification Alt	ternate Identification Address Telephone	Biographical E-n	nail Emergency Cont	act Additional Identification)
From Date:	15-JAN-1995 III To Date:		Inactivate Address		
Address Type:	PR Permanent		Source:		
Sequence Number:	1				
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Street Line 1:	21 King Street		Correction Digit:		2
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Street Line 3:					
City:	Trenton		Last Update		
State or Province:	NJ New Jersey				
ZIP or Postal Code:	08650		User:	YOSHIOKA	
County:			Activity Date:	27-SEP-2011	
Nation:	2 Albania	Area Code	Phone Number	Extension	
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You can view the additional addresses by taking **one** of these actions:

- Using the Down/Up arrow keys on your keypad
- Using the Page-Dn/Page-Up keys
- Using the Toolbar icon for Next/Previous Record
- Using the Record pull-down Menu Bar items for Next and Previous

There are two ways to return to the key block on a form from any associated block. Either:

- Use the Rollback icon on the Toolbar (this also "clears" the form)
- Press Shift-F7.



Once back in the key block, you can change to another ID/Name combination or leave the form (you can also leave the form from any block at any time by pressing exit or using CTRL-Q).

Go back to SPAIDEN and click on the Biographic tab, which contains biographic and demographic information, and provides a good example of many field types:

00	USF Banner 8 TEST – B	anner ERP System: Open	> SPAIDEN	
Eile Edit Options Block Item Record Query T	ools <u>H</u> elp			
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General Person Identification SPAIDEN 8.2 (TF	RNG8) 100000000000000	****************		000000000000000 ≚×
ID: 210009505 Graber, Cynthia		Generate	ID: 🖗	
Current Identification Alternate Identification	Address Telephone	Biographical E-mail	Emergency Contact Additional	Identification
Gender: OMale	Birth Date: 01-MAR	R-1977 🏛	Confidentia	
• Female	Age: 34		Deceased	
○ Not Available	-	*****	Deceased Date:	
Citizenship:		Veteran File Number:		
Marital Status: S Single		Veteran Category:	None	-
Religion:		Active Duty Separatio		
Legacy: Ethnicity: 1 Caucasian			Armed Forces Servic Special Disabled Vete	
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Ethnicity and Race Cor	nfirmed	User:		
Confirmed Date:		Activit	y Date: 06-JUL-1995	
Race			User	Activity Date
FRM-40700: No such trigger: G\$_SEARCH_OPTION	IS			,
Record: 1/1	IS. <0SC>			

Gender: OMale © Female ONot Available

Radio Button, as in "Gender" – must pick (click on) one from the group

Veteran File Number:		
Veteran Category:	None	-
Active Duty Separation Date:	Other Protected Veteran Only Vietnam Veteran Only Both Vietnam/Other Eligbl. Vet	
Last L	J paace	⊢

Drop-down menu choices, as in the Ethnic field or Veteran Category – clicking in the field brings up a list of choices to select for that field.

List of values (LOV) as in the "Citizenship" – double-clicking in the field (or pressing F9 when the cursor is in that field) will result in a list of values (also called a LOV or "love" result) acceptable for this field. Double-click on a value or click OK to return to the form;

click Cancel to return to the form without selecting a value. (You may also key the value in directly, if you know what it should be. Remember to check the Auto Hint/Status line if you get stuck in a field!).

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		Y		
				nd) (CK Cancel)

Birth Date:	*****
Age:	###
SSN/SIN/TIN:	*****

Tool icons, as for the calendar associated with the birth date.

FGAC – the SSN field displays just ***'s for SSN and prohibits access to the data in the field. This is Fine Grained Access Control. Calculated, as in Age – Banner often displays

information computed from other data (birth date, in this case).

Deceased Date:	Confidential
Veteran File Number:	

YOSHIOKA

Activity Date: 29-NOV-2007

Last Update

User:

Checkbox, as for the "Confidential" field –
yes/no or enable/disable of a feature or option
(click to switch between values)
<i>Free-form</i> , as for the SSN field and Veteran
File Number – not edited so be careful what
you key!

<i>Disabled</i> – the fields related to "Last Update" are in
a separate, protected box, not available for update,
either because this is display-only data or due to
your personal security rights. In this particular case,
since Banner records the "electronic signature" of

the individual making the update to provide an audit trail of activity, the User field is set to display-only.

Navigating Between Forms

The Options Menu:

- Allows short-cut navigation to related Banner forms and windows.
- Choices depend on the form and the block you are currently using the list reflects other associated forms or blocks.
- Can be activated by either clicking on the menu item or concurrently pressing the Alt key and the letter O (if the option wanted is the first one on the list starting with a specific letter, pressing that letter will activate the form or window).

Eile Edit	Options Block Item Record Quer	y <u>T</u> ools <u>H</u> elp
🔲 🔊	Current Name/ID	2 📾 🕱 í 🕰 í 📇
🧖 Genera	Delivery Point Information	(TRNG) 000000000000
	Telephone Numbers [SPATELE]	
ID:	Email Addresses [GOAEMAL]	
ID. [System Data Summary [GUASYST]	
	Alternate Names/IDs	J
Current 1	Identification Alternate Identification	n Address

• Items in the list not followed by an object name can also be reached via the tabs across the display.

Searching in a Form

The power of Banner navigation comes from knowing how to do queries to find what you need. This may be initially challenging but the key is practicing the steps in the queries and in time the steps will become more familiar.

Return to the SPAIDEN form to perform a sample search. Of course the simplest way to search for a person is to enter the CWID in the ID field. In many cases the person may not have know their CWID so you will need to search by name. Press the Delete key to blank out the ID field. Tab to the name field (this will cause it to be blanked out). Now with both fields blank, type in as much of the name as possible.

ID:	▼ forest, elizabeth	
ID:	forest	
ID:	,elizabeth	

In the first two instances, the name

needs to be spelled fully and correctly as Banner is looking for a match of the entire name or last name. For the full

name, enter the last name, a comma and the first name. If only the first name is known, type a comma and then the first name.

In those cases where you are not sure of the spelling of part of the name, you can add wildcards to the search.

There are two types of wildcards:

- A % represents any number of unspecified characters. This will be the most common wildcard used in searches.
- A _ represents one occurrence of an unspecified character (simultaneously press the SHIFT and dash keys to enter an _). This wildcard is not commonly used but may be helpful in specific searches.

ID:	for%	

Our example will use the % for the search-remember

	ID		▼ %est
--	----	--	--------

All names that end with ...%

ID:

All names with last names that contain ...%

▼∥%res%

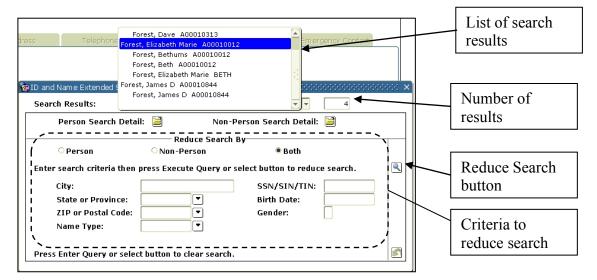
All names with last names that begin with ...%

ID: vres%, el%

All names with last names that contain ...% and with first names that begin with...%

Press Enter. If one match is found, the ID and name are returned.

If more than one match is found, an extended search window appears. Click on the drop-down indicator on the Search Results line – all possible matches appear (note that alternate names and IDs associated with your original criteria will be indented under the preferred name and ID).



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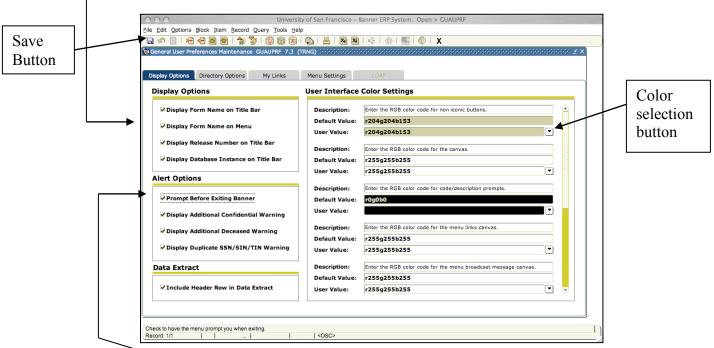
that the wildcard can be used before, after or both ends of a character string, depending on what you have to work with. The list of search results can be extensive, especially if the name is common or if you only have a partial of the name. You can then enter other information, including the SSN (one of the few places it can be used) in the Reduce Search By section. Press the Reduce Search button or Execute Query (either from the toolbar or with function key F8) to list the new results. Of course the more information you have, even if you don't have the full name, the better the search.

Now you know the basics of navigating around some of the Banner forms and doing simple searches. As you begin to use Banner this will become as second nature as anything else you do regularly.

Setting User Preferences

It is possible for users to set some preferences to make their INB environment unique to them, like setting up links or changing color schemes. Remember that for each change you will need to save that changes before exiting out of the form or moving to another tab in the Preferences form.

- Go to the GUAUPRF form or select Preferences in the File menu
- By default you are on the Display Options tab. Key elements here:



• Enable all of the items in the Display Options Section.

 Construction Enable or disable warning message before quitting INB by checking or un-checking the *Prompt Before Exiting Banner selection*. • Ability to change colors. To change the color of a particular interface element, click on the LOV button to the right of the User Value to bring up the color palette. To return the color to default, select the value in the User Value field and press Delete or Backspace and then Enter or Return.

Univers	ity of San Francisco – Banner ERP System: Open > GUAUPRF	
Eile Edit Options Block Item Record Query Tools He		
🕒 🖉 📋 🖂 🖨 🖻 😓 🛭 🎓 🍞 🛙 🗐 😣	🕒 📇 🖼 🕷 🚸 🎆 🕲 🗙	
General User Preferences Maintenance GUAUPRF 7.3	(TRNG)	$\mathbb{Z} \times$
Display Options Directory Options My Links	Menu Settings LDAP	
Display Options	User Interface Color Settings	
☑ Display Form Name on Title Bar	Description O Select color.	
✓ Display Form Name on Menu	Default V Swatches HSB RGB	
	User Valu	
G Display Release Number on Title Bar	Descripti	
☑ Display Database Instance on Title Bar	Default V	
Alast Ostions	User Valu	
Alert Options	Descripti	_
Prompt Before Exiting Banner	Default V	
✓ Display Additional Confidential Warning	User Valu	
	Descripti	
Display Additional Deceased Warning	Default V Preview	
Display Duplicate SSN/SIN/TIN Warning	User Valu Sample Text Sample Text	
Data Extract	Descripti	
	Default V OK Cancel Reset	
✓ Include Header Row in Data Extract	User Valu	
L		
Check to have form name display on window title.		
Record: 1/1	<osc></osc>	

A warning with colors: depending on the color selected, it could make the interface difficult to read or view. Light or muted colors seem to work best.

• My Links tab: where users can set their personal links. In the description, type in a name that will be displayed in the personal Links section. Then enter the URL or Banner form name to the actual link. Remember that for web sites, the entire web address needs to be entered.

Display Options	Directory Options My Links Menu Settings LDAP		User Value for description
Description:	Enter the URL for the "My Institution" link.		description
Default Value:	http://www.usfca.edu		
User Value:	http://www.usfca.edu		
Description:	Enter the description for the "My Personal Link 1" link.		
Default Value:	Your first personal link description		
User Value:	СІТ		User Value for
			actual link
Description:	Enter the URL or Banner object for the "My Personal Link 1" link.		
Default Value:	Your first personal link URL		
User Value:	http://www.usfca.edu/its/cit		
Description:	Enter the description for the "My Personal Link 2" link.	•	
Default Value:	Your second personal link description		
User Value:	Your second personal link description	•	
		•	
Description:	Enter the URL or Banner object for the "My Personal Link 2" link.	•	
Default Value:	Your second personal link URL	•	
User Value:	http://Your second personal link URL		

• Menu Settings tab: user could set up to have one of the menus already expanded,

Display Options Dire	ctory Options	My Links 🗾 🚺	Menu Settings 🛛	LDAP	
Starting Menu Op	tion				
Description:	Enter the name of	your preferred sta	rt-up menu.		
Default Value:	*MENU		Products Menu		
User Default:	*MENU	•	Products Menu		
List of Objects				×	
Find [*] per					
Object	Description				
*PERSON	General Person				
*PERSONAL	My Banner				
<u>ن الا</u>					
	Eind	QK Cancel	D		

like the student menu. Enter the folder name with an * in front (*PERSON) or search for the folder by clicking on the LOV button to the right of the User Default to bring up the List of Objects window to search for the folder.

Generally speaking, users will need to log out of INB and back in before their changes will take affect. Again, for any of these preferences, you can set any of the settings back to system default by deleting the user value or default and pressing Enter or Return.

GUASYST form

The GUASYST form will be useful for the Help Desk because it will show how a person is defined in the system.

Additional Resources

 Data Standards Manual: eventually users will have to pass a tutorial-based quiz on the Data Standards Manual before getting access to the production environment of Banner. This is to ensure that everyone knows what standards are in place – remember, Banner is one big sandbox now, and what you do can and will affect others outside of your area.

https://intraweb.usfca.edu/its/erp/usf/dstds/

- Banner Main Webpage: <u>http://www.usfca.edu/its/information/banner/</u>
- Project BOB Internal USF Resources: <u>https://intraweb.usfca.edu/its/erp/usf/</u>
- **ITS Help Desk:** The front line for assistance with navigation and issues with functionality in Banner will be the ITS Help Desk. You can contact the Help Desk at: Lone Mountain North 2nd Floor

415-422-6668 itshelp@usfca.edu

How to Add and Remove Shortcuts to Internet Native Banner Forms

One of the features of Internet Native Banner (INB) is the ability to create shortcuts to forms/objects you may want quick access to. This feature is helpful if you go to certain forms over and over again, or if you have a few forms you need to access but don't access very often. Once you create the shortcuts they are available in the My Banner folder on the main Banner window, also called the General Menu (GUAGMNU) form.

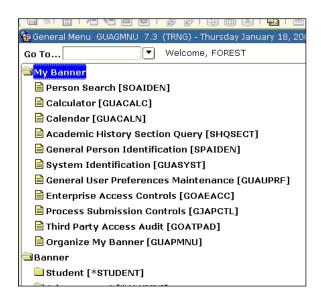
Adding a Shortcut to My Banner

The easiest way to create a shortcut in INB is to do it from the actual form you want the shortcut for.

- 1) Open the form you plan on creating a shortcut for, i.e. SPAIDEN.
- Right click any portion of the form that is not an actual field and you will get a listing of options (Mac users: Ctrl + Mouse click). Then select the option to "Add to Personal Menu". The menu listing will disappear if chosen successfully.

$\Theta \Theta \Theta$	Oracle Develop	oer Forms Runtime – W	/eb: Open > SPAII	DEN	
Eile Edit Options Block Item	. <u>R</u> ecord Query <u>T</u> ools <u>H</u> elp				
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	SPAIDEN 7.3 (TRNG) 000000000				× 🗉 2000000000000 🗹 ×
ID: A00010012 Forest,	, Elizabeth M.		Generate ID: 🖗		
Current Identification Alterna	ate Identification Address	Telephone	Biographical	E-mail	Emergency Contact
	ie Type:				
Person				ID and Name So	urce
Last Name:	Forest			Bollback	
First Name:	Elizabeth			Save	
Middle Name:	Marie		I	Exit Print	
Prefix:			i •		
Suffix:				Add to Personal Menu	
Preferred First Name:	Beth			Addresses	
Full Legal Name:	Elizabeth Marie Forest			⊆urrent Name/ID	
				Alternate Names/IDs	
			,	_ Current Name/ID Sou	urce
			\ `	Legal Name	
Non-Person				System Data Summa Jser: FOREST Create Date: 03-MAR	
Name:][•	Create Date. US-MAK	
Print Record: 1/1		<05C>			
Necolu. 1/1		<03C2			

- 3) Do this for each form you want to have a shortcut.
- 4) In order for the shortcuts to show up in your My Banner folder, you must exit INB and then login again.
- 5) To see your shortcuts, expand the **My Banner** folder and your form shortcuts should now appear.



How to Delete Shortcuts from your My Banner folder

Sometimes you may want to clean up your **My Banner** folder. Removing shortcuts is done via the GUAPMNU form.

1) Enter GUAPMNU in the Go To field and hit enter.



2) The GUAPMNU form should now appear.

🏯 Oracle Developer Forms Runtime - Web: Open > GUAP&	MNU		
File Edit Options Block Item Record Query Tools He	jelp		
(🖬 🔊 🖹 i 🛥 🖨 🖻 i 🎓 🖥 i 😵 📾 😣 i	🕰 📇 🔀 🔀 🧉	€I⊕II©ΩI X	
🙀 My Banner Maintenance GUAPMNU 7.3 (TRNG) 55555			_≝ × Ì
GELAYUG's Personal Menu			
	Object	Description	
Type: Oracle Forms module 🛛 🖉	STVGSTA	Academic History Catalog Query	ם ר
Object Description	FOA1099	1099-MISC Magnetic Tape Transmitter Data	-
TSA1098 1098-T Tax Information	PTV1099	1099-R Distribution Code Validation	1
FTMITYP 1099 Income Type Code Maintenance	SPAIDEN	General Person Identification	1
FAA1099 1099 Reporting	TSADETL	Student Account Detail	i
FOA1099 1099-MISC Magnetic Tape Transmitter D			1
PXA1099 1099-R			1
PTV1099 1099-R Distribution Code Validation			٦ I
RNAOV00 1999-2000 Applicant Override			13
RNRGLBL 1999-2000 INAS Global Policy Options R			1 81
RNIMS00 1999-2000 Miscellaneous Results Inquiry			F 8
RNANA00 1999-2000 Need Analysis			티 월 📗
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RNAPROD 1999-2000 Need Analysis Processing			T 8
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REAOR00 1999-2000 Pell Origination/Acknowledge			1 I I
RNASL00 1999-2000 Student Loan Data			1
RNASU00 1999-2000 Supplemental Need Analysis			i
READI01 2000-2001 Pell Disbursement/Acknowled			1
REAOR01 2000-2001 Pell Origination/Acknowledge			- I I
RNAOV02 2001-2002 Applicant Override			1
RNRGL02 2001-2002 INAS Global Policy Options R			- I
RNIMS02 2001-2002 Miscellaneous Results Inquiry 👻			- -
			-
Enter Form, Process, QuickFlow or Menu description			
Record: 4/5	<0SC>		

All the shortcuts currently showing up in **My Banner** are listed on the right-side of the form.

- 3) To delete the form, find it on the list in the right-side and **double-click** on the form/object. Double-clicking is required to actually select the form which will then change color (by default it should turn blue).
- 4) Click the left arrow in the middle of the page and you will notice your selected item disappear from the list on the right.
- 5) Save your changes by **clicking** on the **Save** button. Next time you login to INB forms/objects deleted will no longer show up in the **My Banner** folder.

Advanced Users Note: you can also add your My Banner shortcuts via the GUAPMNU form. To do so, simply find the form/object you want to add from the list on the left, double-click the item so it turns blue (i.e. as noted in #3 of deleting a shortcut), and then click the right arrow to add it to the list on the right. You will need to exit INB and login again before changes will be reflected in the My Banner folder.

Quick-Reference Guide to Banner Toolbar/Keyboard Commands Horizontal Toolbar Icons

Image: Select Remove Record Rollback Previous Block	Print Print View/Send Message mmands are available on every change for use of F9	, v
Function	Keys	
$\overline{\text{Block} - \text{clear}}$	Shift+F5	
Block – next	Ctrl+PgDn	
Block – previous	Ctrl+PgUp	
Count Query Hits	Shift+F2	
Display Oracle Error	Shift+F1	
Exit	Ctrl+Q	
Field – clear	Ctrl+U	
Field – duplicate	F3	
Field – next	Tab	
Field – previous	Shift+Tab	
Go To another form	F5	
LOV (List Of Values)	F9	
Options	Right Click	
Print	Shift+F8	
Query – cancel	Ctrl+Q	
Query – enter	F7	
Query – execute	F8	
Record – clear	Shift+F4	
Record – duplicate	F4	
Record – insert	F6	
Record – next	↓ or PgDn	
Record – previous	↑ or PgUp	
Record – remove (delete)	Shift+F6	
Rollback	Shift+F7	
Save	F10	
Select	Shift+F3	
Show Keys	Ctrl+F1	

Macintosh Considerations for Use of Keyboard Commands in Banner:

Issues when using INB and Safari or Firefox on a Mac operating system:

- The keyboard command Command-V to paste is not enabled in Banner forms.
- F9 "tiles all open windows" rather than displays a list of values
- F10 "tiles all open windows for the current application" rather than commits changes

Recommended workarounds:

- To paste text into Banner forms, use the keyboard combination, **Shift-Command-**V to paste text into the fields if the combination **Command-V** does not work.
- Reassign the F9 and F10 keys to use Shift-F9 and Shift-F10 by following these steps:
 - 1. Open System Preferences via the Apple Menu.

G Finder File E	dit View	Go V	Vi
About This Mac			
Software Update			
Mac OS X Software			
and the second second	ABY		-
System Preferences.	•		
Dock		•	•
Location		•	•
Recent Items		•	
Force Quit Finder		CO#O)
Sleep			
Restart			
Shut Down			
Log Out Kenneth J. Y	oshioka	企業O	

2. Click on the **Dashboard & Exposé** control panel. Under the **Keyboard and Mouse Shorcuts** section, change:

From:

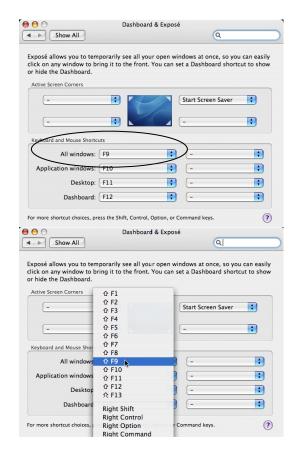
All windows: F9 Application windows: F10

To:

All windows: Shift-F9 Application windows: Shift-F10

You do this by holding down the **Shift** key while clicking on the drop down menu to change the key assignments to **Shift-F9** and **Shift-F10**. You will now use this combination to invoke these **Exposé** commands.

- 3. Quit out of System Preferences.
- 4. Verify that INB in Safari or Firefox now results in the "Banner" use of F9 and F10 keys.



Banner and Web Xtender

FAQ

What is Xtender and how does it affect me?

Xtender is a document imaging software created by EMC Documentum that works in conjunction with Banner and has replaced Disc Image for the storage and maintenance of scanned student records at USF.

Xtender will contain all former, current, and prospective student files, as dictated by the record retention policies of the University, as well as documents pertaining to other departments, such as Human Resources and Advancement. These documents are separated into different "applications" (or file cabinets) by the department to which they pertain. The Xtender application for student records is called Banner Student Admissions, or B-S-ADMN.

How do I get access to Xtender?

In order to obtain access to Xtender, a user must first attend a Banner navigation training to obtain a Banner account. An Xtender account can then be established with access rights depending on job responsibilities. Requests for more information on obtaining an Xtender account to view student records can be forwarded to Ken Yoshioka at yoshioka@usfca.edu.

Viewing and Printing Documents

Note for Mac users: The preferred browser for using Xtender on a Mac is Firefox 3.6.x and the preferences for using the curser keys need to be disabled as seen in the figure to the right. Click on the Firefox menu and select **Preferences**. Click on **Advanced** and uncheck the box for **Always use the curser keys to navigate within pages**. Click on **Tabs** and in the section for **New pages should be opened in...** select **A new window**. Close the preferences.



NOTE: If you have a pop-up blocker, you must disable it first or add the URL (*.usfca.edu) to your "allow pop-ups" list. With some pop-up blockers, you can just hold down the CTRL key while you click on the link.

In addition, Mac users need to change a setting in the Xtender preferences to view the documents. In Xtender, click on the Edit menu and select User Settings, as seen in the figure below.

File	Ed	lit	View	Options	Help
0	0	Her	v Query	3	
Sin	2	Use	er Settings		
		Ada	ministration		

Then click on the tab for Interactive Viewer. Uncheck the boxes for Enable Interactive Viewer, Display Annotation Toolbar and Print Original Size. Scroll to the bottom of the Settings window and click Save.

Data Source	BXS-TRNG		
Search/Result Set	Interactive Viewer Options		
Full Text	Enable Interactive Viewer		
Document View	Use Verity KeyView To Display Foreign Scale-To-Gray	Files	
Interactive Viewer	Display Annotation Toolbar Default Image Size	Original Size 🔻	
COLD	Print Options	,	
Result Set Print	Print Original Size		
Email	Dithering	None •	
Printer Friendly View		None _	
	Overlap Endorsement On Image Endorsement Position:	Upper Left •	
	Endorsement Text (roughly 200 characters		
	8		
	Import Format		
Done	Black & White Images:	Default 💌	

- 1. Log into Banner with your Banner username and password.
- 2. Once in Banner, you must be in a Student module form to be able to access Xtender. Some forms that you can go to include: SAAADMS, SGASTDN.
- 3. Once in the student module form, bring up the record of the student in question and click on the Banner Xtender Solutions icon on the toolbar.

<u>File Edit Options Block Item Record Query Tools Help</u>	
🔚 🖉 🖹 i 🔁 🖨 🗟 i 🎓 🐉 i 😫 📾 i 🏝 i 🖺	🖻 🖪 🛭 🎼 🕼 🖓 🖓 🖓 🖕 🗶
g General Person Identification SPAIDEN 8.2 (TRNG8) 20000000000	terent concentration concentration concentration concentration of X

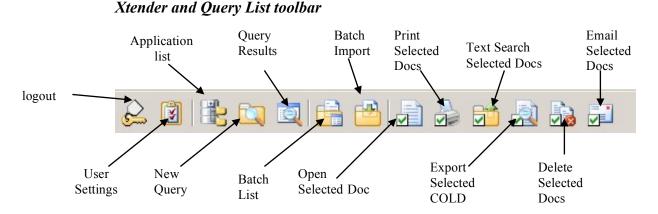
Admissions Application SAAADMS 8.2 (TRNG8) ID: 210009505 Caber, Cynthia pplication Curricula Fees, Mail Submission, With Application Entry Term: 199510 Fall 1994 Admission Type: ST Standard Student Type: N New First Tim Residence: O Out of state f	X Q A R F Term hdrawal Data Checklist S Application Number: 1	n: v Sources, Interests, Comments	View Curro	ent/Active Curricula
Admissions Application SAAAADMS 8.2 (TRNGB) # ID: 210009505 T Graber, Cynthia plication Curricula Fees, Mail Submission, With Application Entry Term: 199510 T Fall 1994 Admission Type: ST Standard Student Type: N N New First Tim Residence: O Out of state f	Term hdrawal Data Checklist S Application Number: 1	n: v Sources, Interests, Comments	View Curre S Contacts, Cohorts, Attrib	ent/Active Curricula
ID: 210009505 T Graber, Cynthia plication Curricula Fees, Mail Submission, With Application Entry Term: 199210 T Fall 1994 Admission Type: ST Standard Student Type: N New First Tim Residence: O Out of state f	Term hdrawal Data Checklist S Application Number: 1	n: v Sources, Interests, Comments	Contacts, Cohorts, Attrib	ent/Active Curricula
Application Curricula Fees, Mail Submission, With Application Entry Term: 199510 ♥ Fall 1994 Admission Type: ST ♥ Standard Student Type: N ♥ New First Tim Residence: O ♥ Out of state F	hdrawal Data Checklist S Application Number: 1	Sources, Interests, Comments	Contacts, Cohorts, Attrib	utes
Application Entry Term: 199510 Fall 1994 Admission Type: ST Standard Student Type: N Vew First Tim Residence: O Out of state f	Application Number: 1	1 Application Preference		
Admission Type: ST Standard Student Type: N New First Tim Residence: O Out of state for the state of t			Application Date: 1	13-DEC-1993
Student Type: N N New First Tim Residence: O O Out of state F	A n			
Residence: O Out of state F		pplication Status:	D Decision Made	
	ne Ap	pplication Status Date:	19-JAN-1995	2
	Resident Ma	aintained By:	S SYSTEM	
Site:	Ар	pplication Decision:	35 Applicant Acceptance	
Full or Part Time: Full Time Pa	art Time 🏾 None 🛛 Ap	pplication Decision Date:	14-MAR-1994	
Outstanding Requirements: 🗌	Ма	aintained By:	UUSER	-
Curricula Summary- Primary PriorityTerm Program Catalo 1 199510 199510	-		llege Degr llege of Business Bach	ree elor of Busines:
Field of Study Summary Priority Term Type Fie	eld of Study	Department	Attached to	Major 📳
	counting	Accounting		
try term; press LIST for valid codes, DUPLICATE ITEM				

If you are in the Key Block, Xtender will bring up a list of all documents associated with the student. If a particular block, like the application block is selected, then only documents associated with that block is listed. A new window will open into Xtender with the associated documents listed in the Query Results. *At the present time there will be data that will have been scanned and indexed in Xtender but may not have had a record created in Banner. In these cases, you may need to search for the student and documents in question through Xtender via the search query tool described in item 10.*

- 4. This information appears with column headers. You can click on any of the column headers to sort the information by that column. For example:
 - a. If you want to see the information sorted by Term, click on the Term column header.
- 5. If you want to see the results sorted by Document Type, click on the Document Type column header.

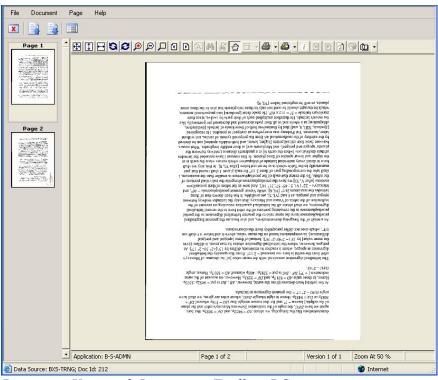
)ue	ery R	esults for	Applic	ation 'B-S-ADMN'							
000	ocument 1 - 9 of 9										
		ID	PIDM	DOCUMENT TYPE	LAST NAME	FIRST NAME	<u>55N</u>	BIRTH DATE	TERM CODE	APPLICATION NUMBER	ADMISSIONS REQUIREMEN
		A00011030	31055	ADMISSIONS REQS	COPERNICUS	NICOLAUS		05-Apr-1473	200720	1	TOFL
		A00011030	31055	ADMISSIONS APP	COPERNICUS	NICOLAUS		05-Apr-1473			
		A00011030	31055	SUPPLEMENTAL INFO	COPERNICUS	NICOLAUS		05-Apr-1473			
		A00011030	31055	SSN CARD	COPERNICUS	NICOLAUS		05-Apr-1473			
		A00011030	31055	ADMISSIONS REQS	COPERNICUS	NICOLAUS		05-Apr-1473	200720	1	CLT1
		A00011030	31055	ADMISSIONS REQS	COPERNICUS	NICOLAUS		05-Apr-1473	200720	1	REF2
		A00011030	31055	ADMISSIONS REQS	COPERNICUS	NICOLAUS		05-Apr-1473	200720	1	REF1
		A00011030	31055	ADMISSIONS REQS	COPERNICUS	NICOLAUS		05-Apr-1473	200720	1	CERT
		A00011030	31055	ADMISSIONS APP	COPERNICUS	NICOLAUS		05-Apr-1473	200720	1	

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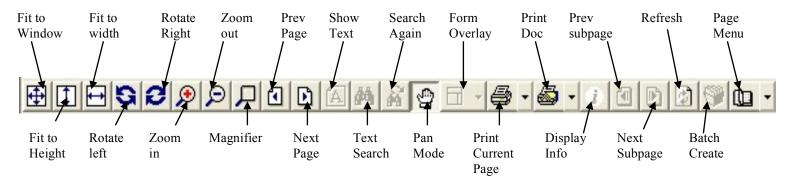
- 6. If you wish to print one or more documents, check off each of the documents you want to print, then click on the Options menu and select Print Selected Items or click on the equivalent item from the toolbar. This function is enabled on Windows only.
- 7. If you wish to view the document(s), you have two options:
 - a. To view one document, click on the Open Document icon to the left of the result.
 - b. To view more than one document, check off each of the documents you want to see, then click on the Options menu and select Open Selected Items.
- 8. Once you have opened a document(s), you will see the image of the document. You can manipulate the document in the following ways:
 - a. If there is more than one page, you can scroll through the pages by clicking on the Next Page and Previous Page icons on the toolbar. You can also jump directly to a page by selecting it in the drop-down box on the toolbar.
 - b. To make the image larger or smaller, Click on the Zoom in/out button on the toolbar. Mac users can select a zoom percentage in the Zoom drop-down box on the toolbar.
 - c. You can scroll through a zoomed document via the scroll bars in the Interactive Viewer. For Mac users, there are no scroll bars in the Document view window but you can scroll through the zoomed document by the arrow keys.
 - d. To rotate the image, you can select a rotation degree in the Rotate dropdown box on the toolbar. This tool is available only on Windows.
 - e. If you selected more than one document to open, you can scroll through the different documents by clicking on the Next Document and Previous Document icons on the toolbar.
 - f. To see the index data associated with the image displayed, you can click in the Document Index icon on the toolbar. Click this icon again to hide the index data. On the Mac the index data column is truncated and cannot be expanded.

9. Again note that for Mac users, the interactive viewer toolbar is not available and there will be fewer options and tools in manipulating the file.

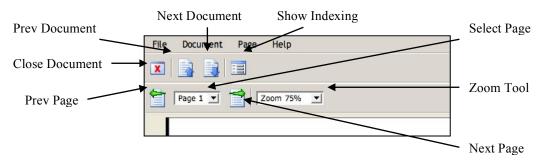


Document View with Interactive Toolbar-PC

Interactive Toolbar-PC only



Document View Toolbar-Mac



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10. To print the document, click on either the **Print Current Page** or the **Print Document** buttons on the browser's interactive toolbar to print that page. (Again, to print multiple documents, see step 5.) Mac users will need to click on the **Pages** menu and select **Printer Friendly View**. Then click on the **File** menu and select **Print**. If the document has more than one page, each page must be printed separately.

🗯 Firefox	File Edit View History Bookmarks Tools Window Help						
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- 11. To return to the Query Results, close the Document View window. If it is available, you can also click on the Query Results icon on the Xtender/Query Results toolbar.
- 12. To do a new query, click on the New Query icon on the toolbar.



Query Criteria for Application 'B-S-ADMN'	Current Query: New Query 💌 📤										
Show Index Name Search Value											
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- 13. Once in the query form, you can enter a value into any of the listed fields. For example:
 - a. If you know the student's ID number, you can enter it in the ID field, then scroll down and click on Submit.
 - b. If you know the last name and first name, you can enter them in the Last Name and First Name fields, respectively, and then click submit.
- 14. After you click Submit, you will see your search results on the Query Results page. You can then proceed with working with the documents as described from item 4.
- 15. When you are finished with Xtender, click on the Logout icon in the upper-left.