

Internet Native Banner (INB) And WebXtender General Navigation Training

Banner[®]
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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/>

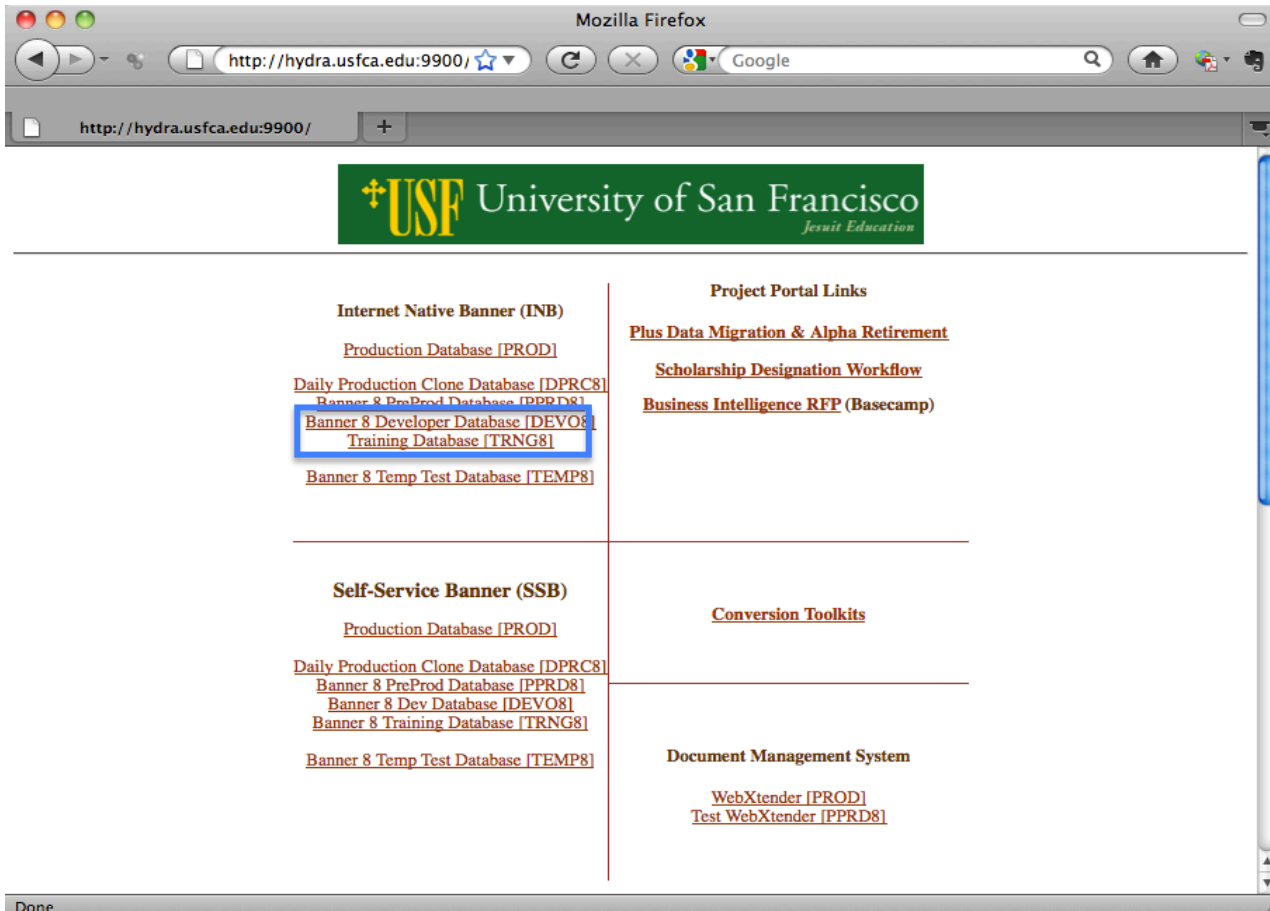
You will need to login with your USFconnect username and password/PIN to access the Banner Security page. The link, “Administrative Systems Suite Access Request Page”, is on this page. If your supervisor does not know the forms to request, then they can enter the functions used in their job. Remember 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

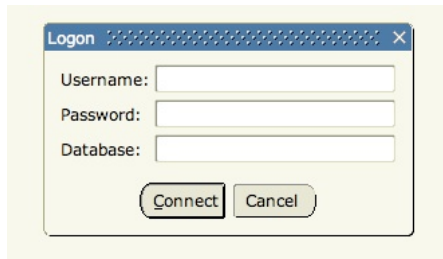
When you receive your PROD Banner account, you will be able to access Banner via Single Sign-on within USFconnect.

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.



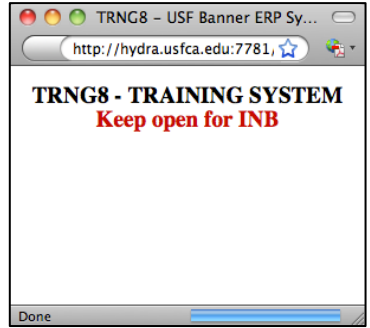
3. It may take a moment for the Oracle *logon* box to appear. When it does, enter your personal username and assigned password for the training database. There is no need to enter a database name.



4. Press the Enter key or click on *Connect*.

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

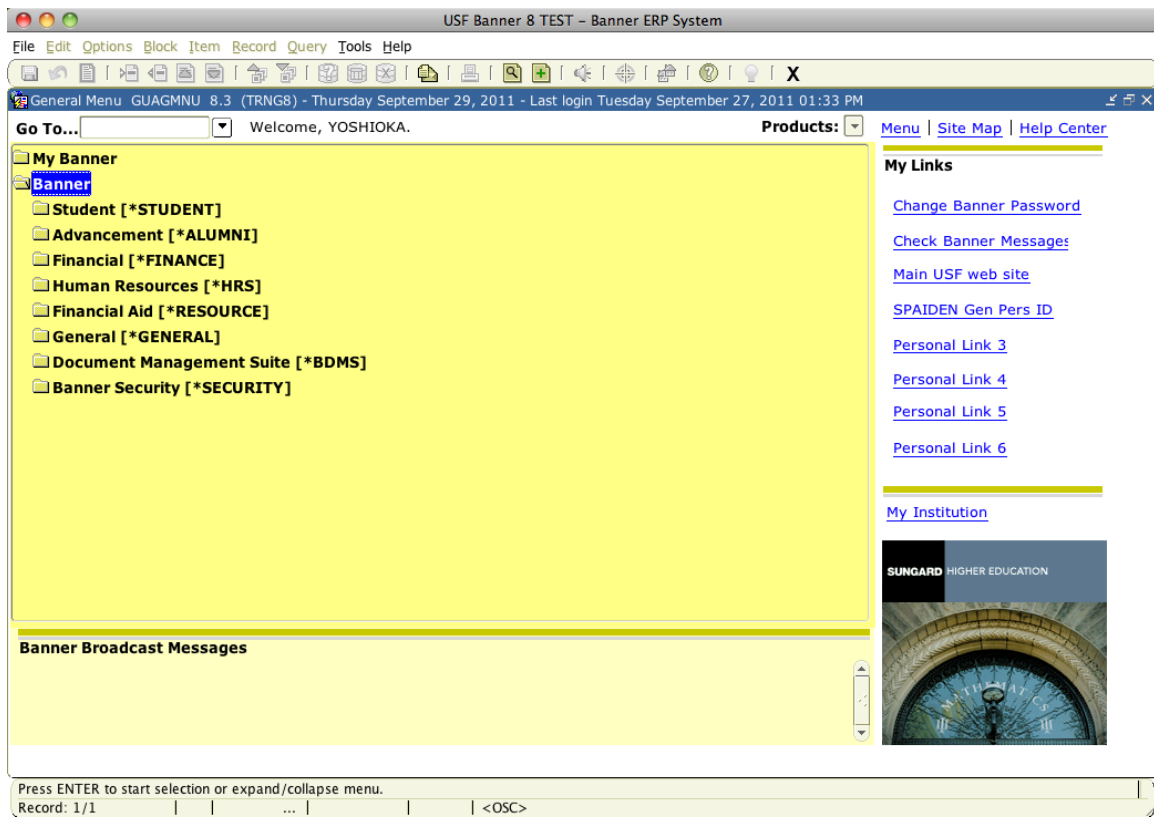
1. Oracle Developer Forms Runtime (the actual INB application)
2. Oracle Application Server Forms Services (some Oracle thing) as seen here.



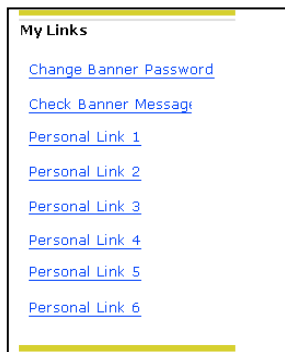
Both are required. If you close #2 it closes the whole INB session.

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.

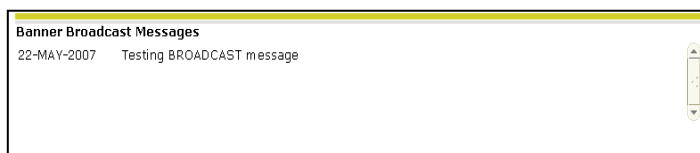


My Links



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.

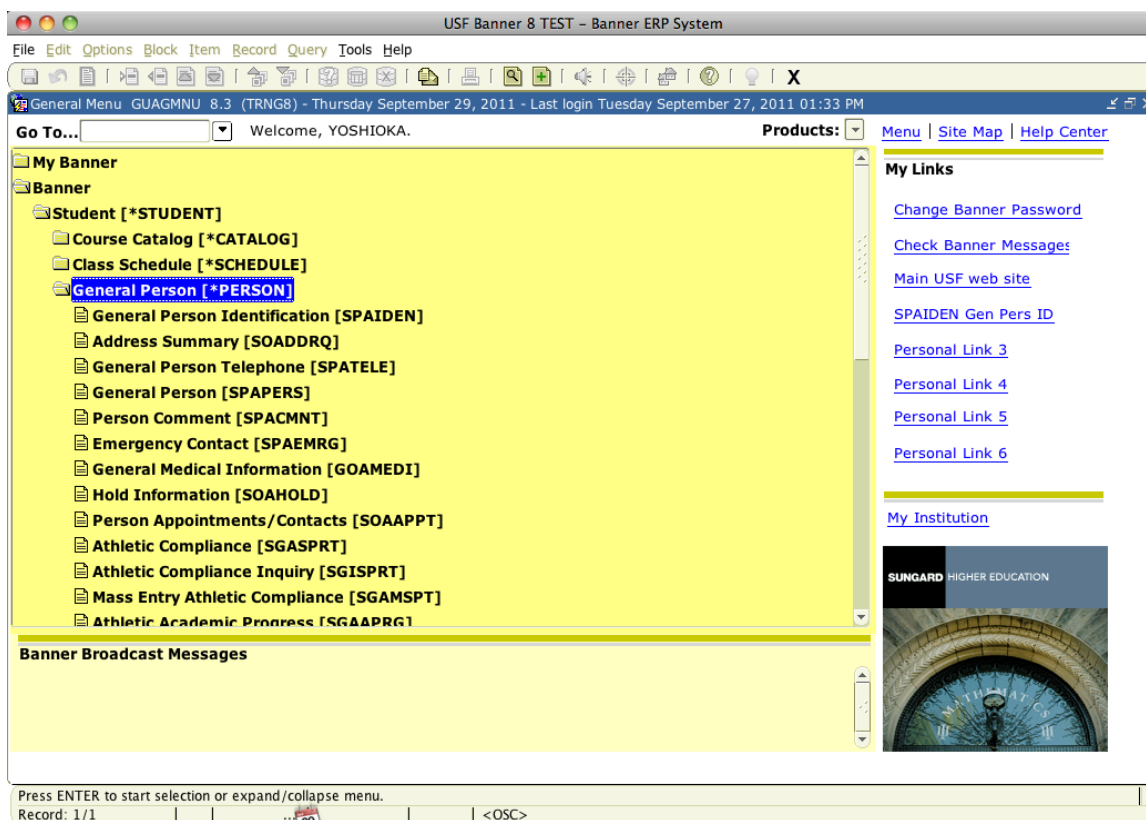
Banner Broadcast Messages



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.

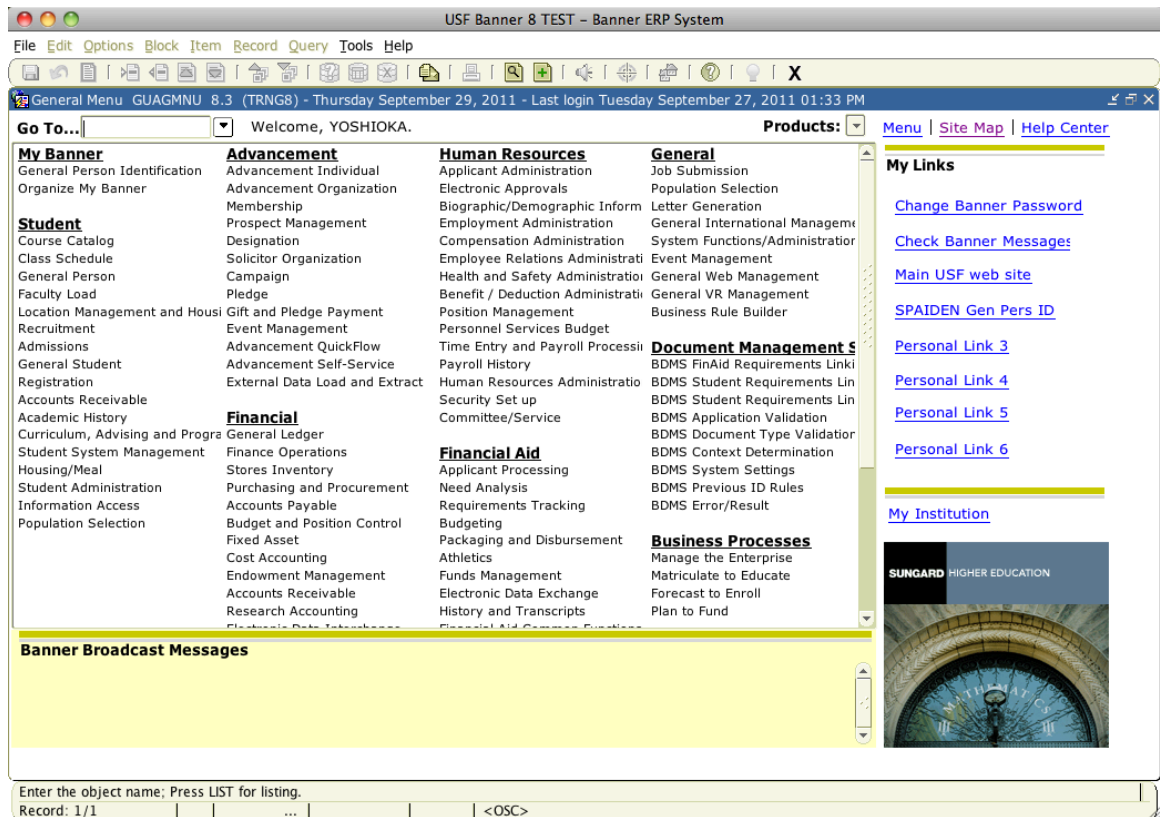
Form Naming Conventions

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.

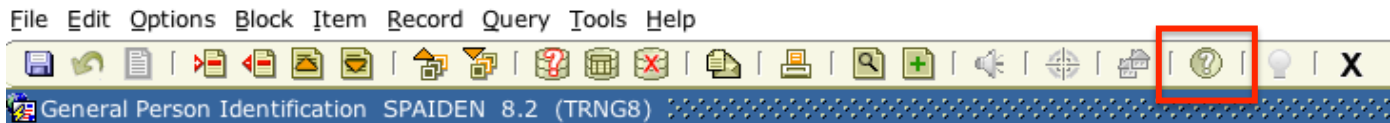
Help Links and Site Map

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.



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.



Security

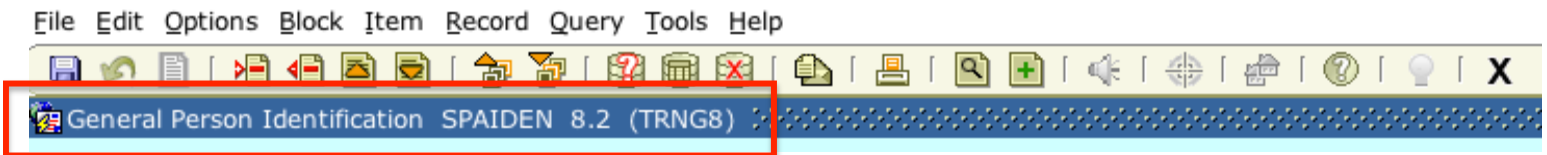
Banner security is based on Oracle technology. Security is driven by form access. At the highest level, ITS sets up “Classes” which are comprised of various forms determined by the functional group. For example, Advancement may have a security class for Gift Processors which includes all forms related 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.

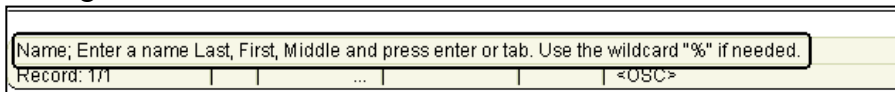
The Title Bar

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)”.



The Status Bar

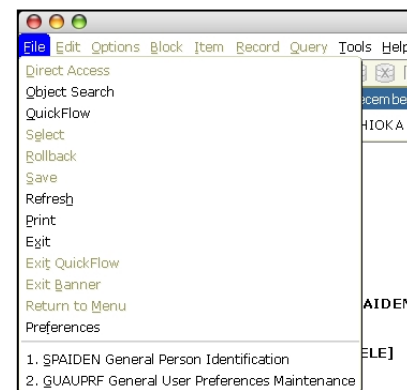
The *Status Bar* at the bottom of each Banner form window reveals information on a pending function, indications of the data needed in a particular field, and any error messages.



Menu Bars

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.



Toolbar

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.

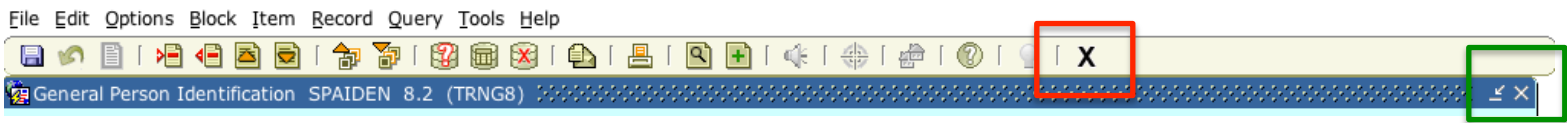
Different Ways of Accessing a Form

Using its Name:

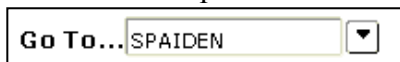
You reached the General Person Identification [SPAIDEN] form by selecting it from the General Person menu and by selecting it from the File Menu's recently viewed forms listing, but you could also directly access that form by knowing its *object name*.

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 not 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.

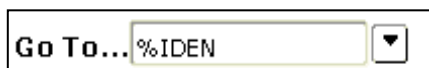
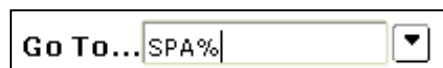
A screenshot of the 'Go To...' field in the Oracle Forms interface. The field contains the text 'SPAIDEN' and a dropdown arrow on the right.

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

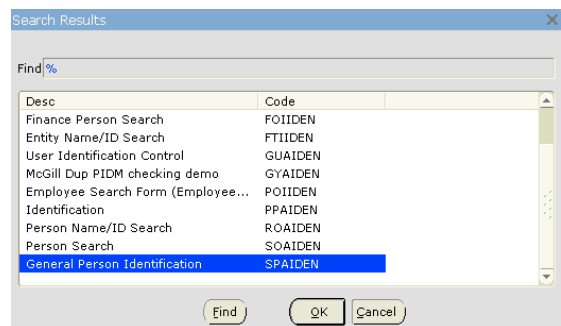
If you know any portion of the name or description you can still find that form using *wildcard* capabilities. Return to the General Menu by pressing the "exit" button at the top right of the SPAIDEN form.

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.

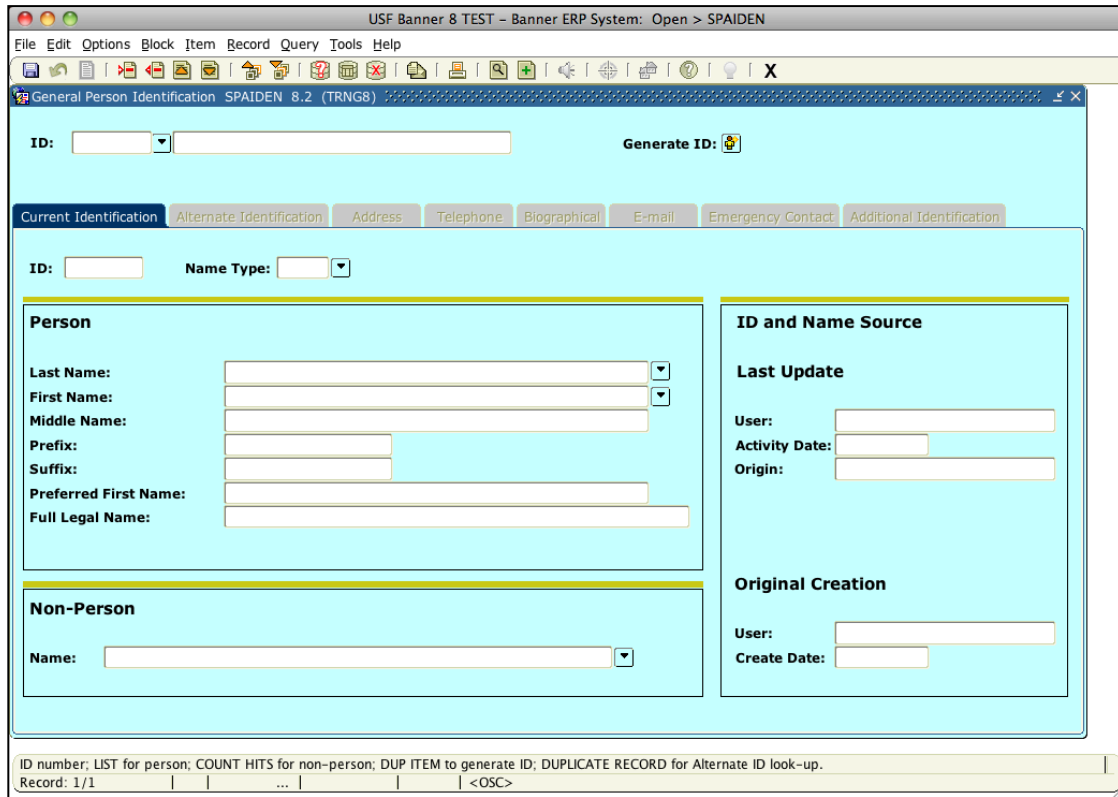
A screenshot of the 'Go To...' field in the Oracle Forms interface. The field contains the text '%IDEN' and a dropdown arrow on the right.A screenshot of the 'Go To...' field in the Oracle Forms interface. The field contains the text 'SPA%' and a dropdown arrow on the right.

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.

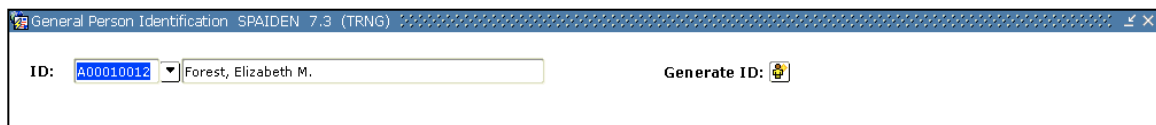


Blocks

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.

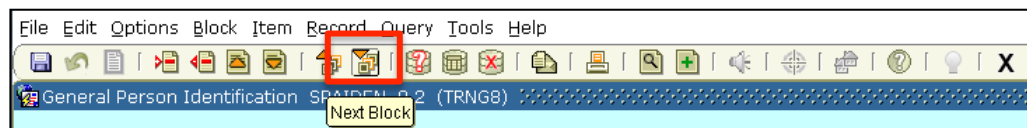


Go back to SPAIDEN (use one of the methods we've already reviewed). In the ID field type in BETH and hit enter or tab. The name Elizabeth M. Forest will show up. The ID field, the name field and Generate ID all are part of the *key block* of the SPAIDEN form. In Banner the ID field for person searches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

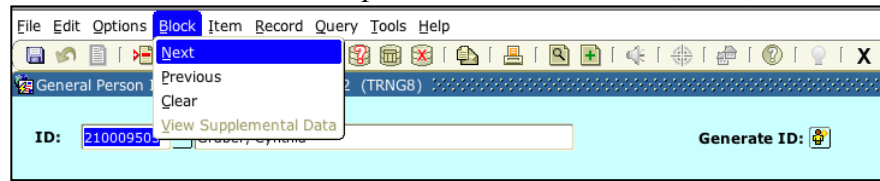


There are multiple ways to navigate between blocks. We are again using SPAIDEN, but your choice of **one** of these actions will work the same on any Banner form:

- Click the *Next Block* icon on the Toolbar

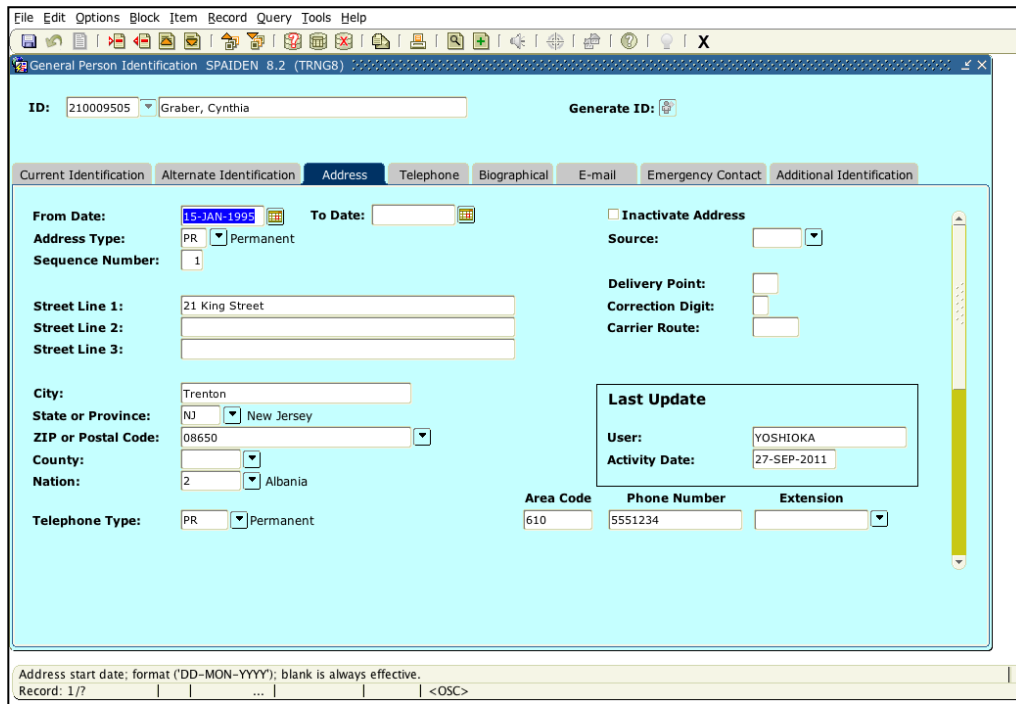


- Select Next from the *Block* pull-down menu



- 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.



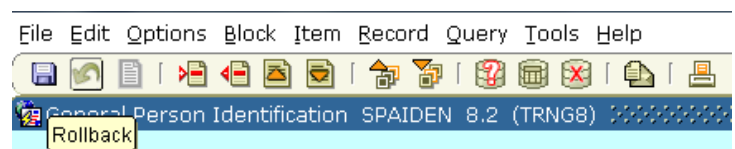
You can view the additional addresses by taking **one** of these actions:

- 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.

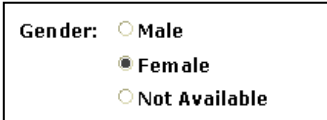
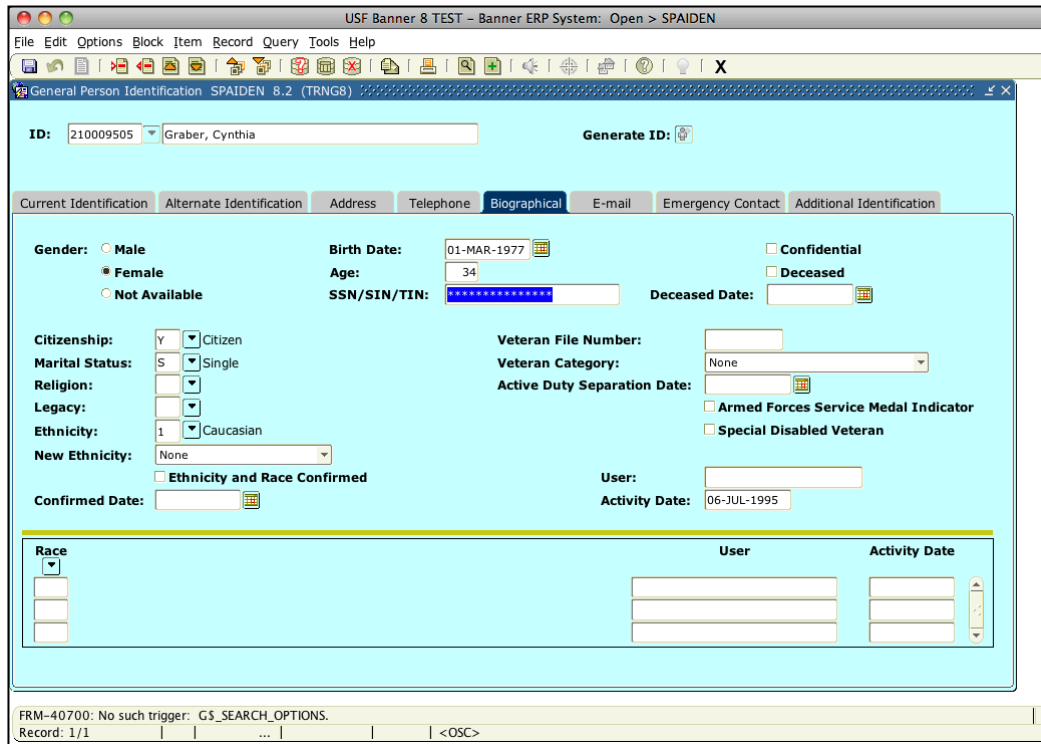
Either:

- 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:



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



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!).

Citizenship:	N	▼	Non-Resident Alien
Marital Status:	W	▼	Widowed
Religion:	MO	▼	Moslem
Legacy:	X	▼	Multiple
Ethnicity:	2	▼	Asian

Code	Desc	Citizen	EDI Equiv
N	Non-Resident Alien	N	
R	Resident Alien	N	
Y	Citizen	Y	

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).

Confidential

Deceased

Deceased Date:

Veteran File Number:

Checkbox, as for the “Confidential” field – yes/no or enable/disable of a feature or option (click to switch between values)

Free-form, as for the SSN field and Veteran File Number – not edited so be careful what you key!

Last Update

User: YOSHIOKA

Activity Date: 29-NOV-2007

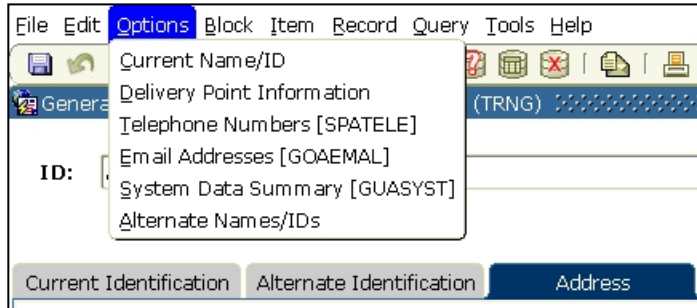
Disabled – the fields related to “Last Update” are in a separate, protected box, not available for update, either because this is display-only data or due to your personal security rights. In this particular case, since Banner records the “electronic signature” of

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).



- 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%

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

ID: %est

All names that end with ...%

ID: %res%

All names with last names that contain ...%

ID: %res%, eI%

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

Our example will use the % for the search-remember

that the wildcard can be used before, after or both ends of a character string, depending on what you have to work 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).

The screenshot shows a search interface with a list of search results and a 'Reduce Search' dialog box. The search results list includes:

- Forest, Dave A00010313
- Forest, Elizabeth Marie A00010012
- Forest, Bethums A00010012
- Forest, Beth A00010012
- Forest, Elizabeth Marie BETH
- Forest, James D A00010844
- Forest, James D A00010844

The 'Reduce Search' dialog box has the following fields and options:

- Reduce Search By: Person, Non-Person, Both
- Enter search criteria then press Execute Query or select button to reduce search.
- City:
- State or Province:
- ZIP or Postal Code:
- Name Type:
- SSN/SIN/TIN:
- Birth Date:
- Gender:
- Press Enter Query or select button to clear search.

Annotations on the right side of the screenshot point to:

- List of search results
- Number of results (4)
- Reduce Search button
- Criteria to reduce search

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.

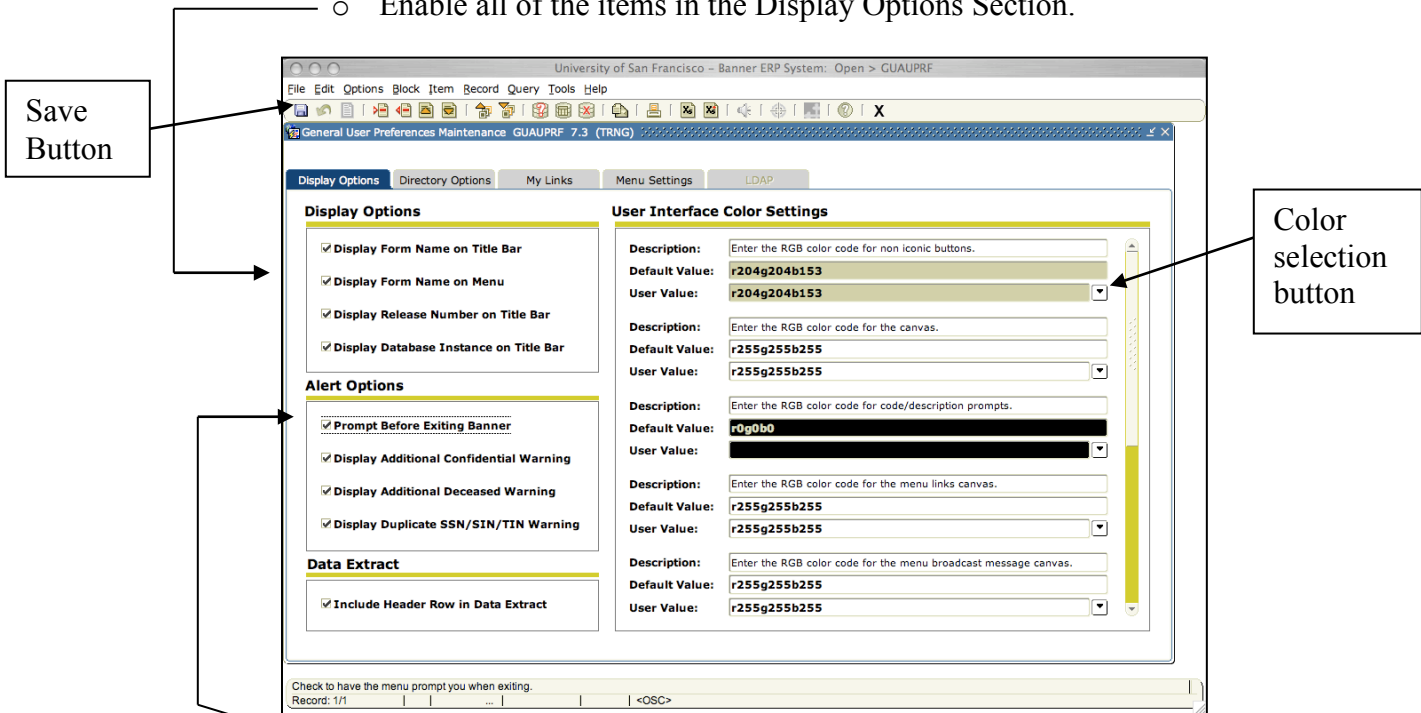
Now you know the basics of navigating around some of the Banner forms and doing simple searches. As you begin to use Banner this will become as second nature as anything else you do regularly.

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.

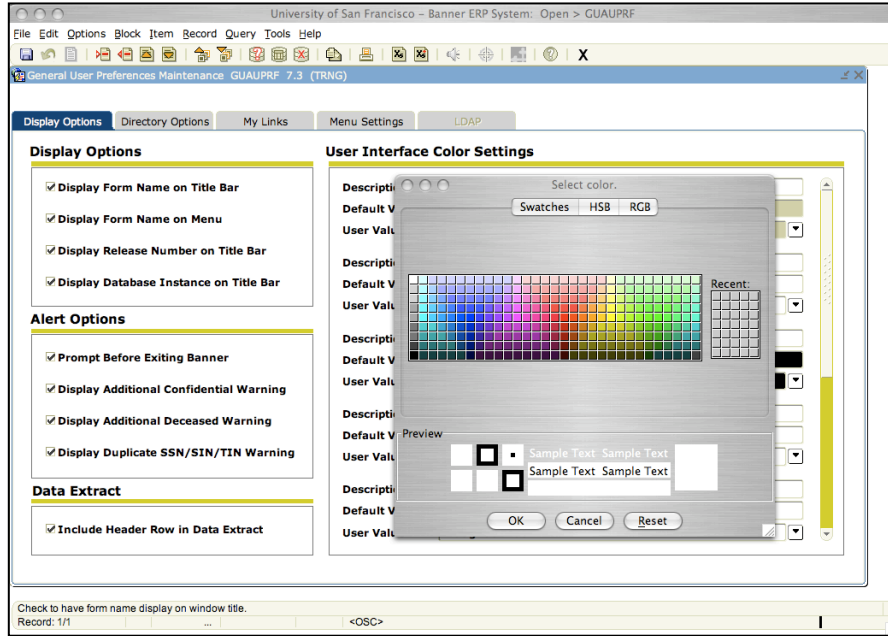
- Go to the GUAUPRF form or select Preferences in the File menu
- By default you are on the Display Options tab. Key elements here:

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



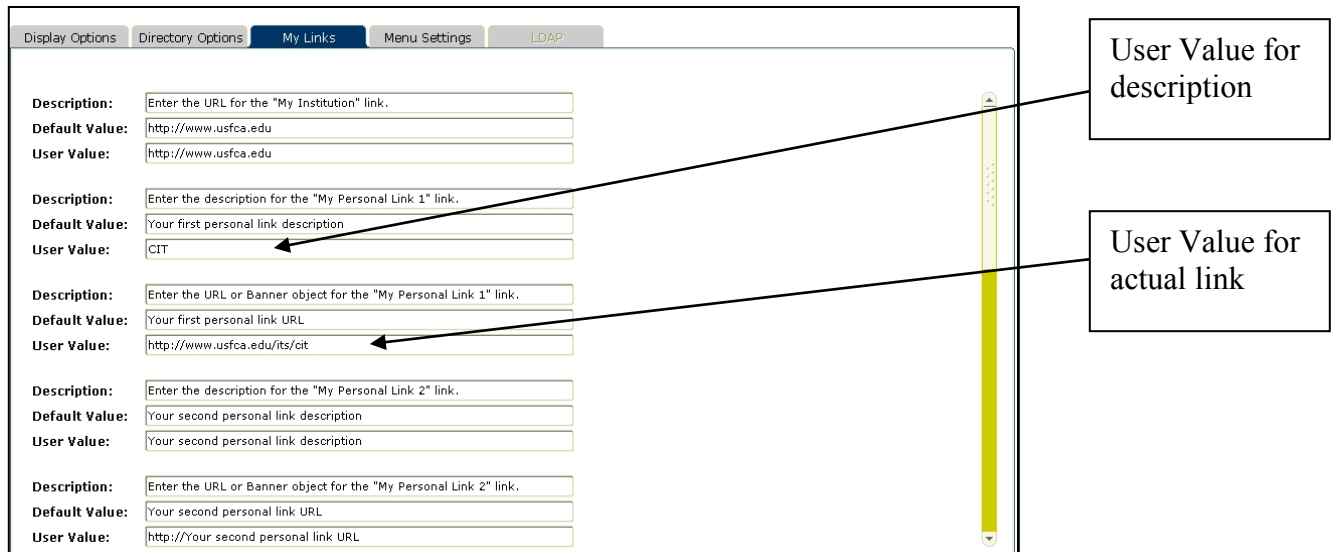
- Enable or disable warning message before quitting INB by checking or un-checking the *Prompt Before Exiting Banner* selection.

- 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.



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.



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

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:** <http://www.usfca.edu/its/information/banner/>
- **Project BOB Internal USF Resources:** <https://intraweb.usfca.edu/its/erp/usf/>
- **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

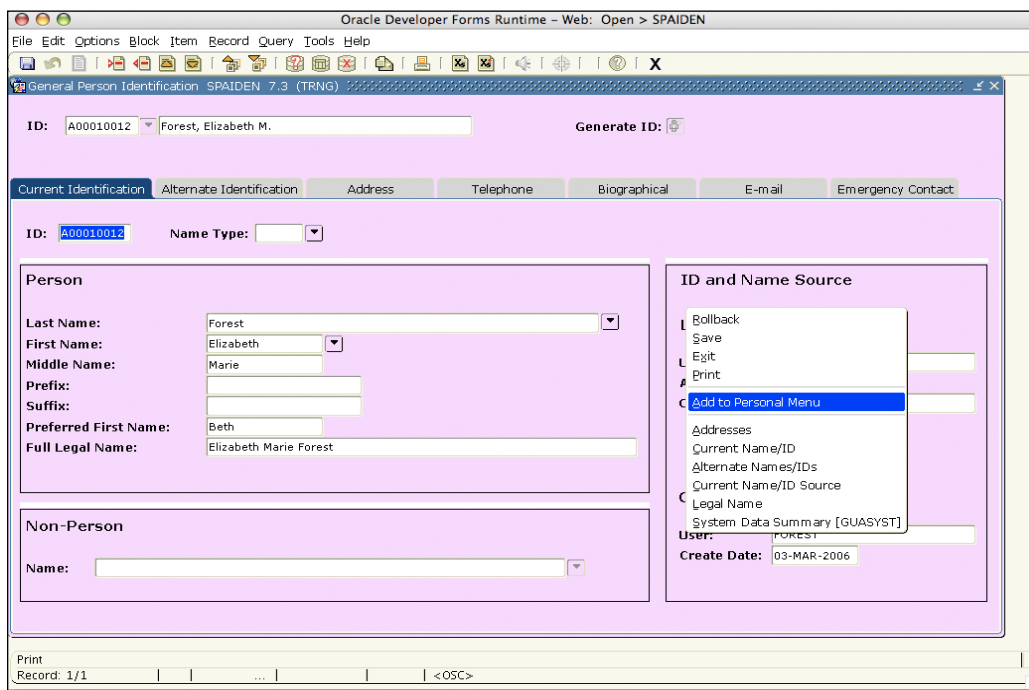
How to Add and Remove Shortcuts to Internet Native Banner Forms

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.

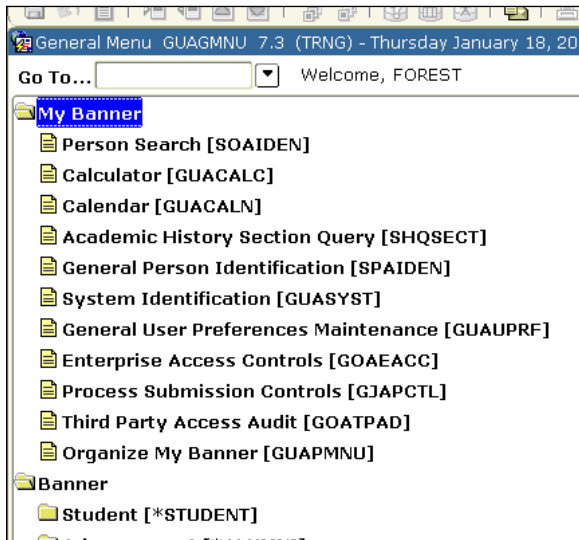
Adding a Shortcut to My Banner

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.
- 2) **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.



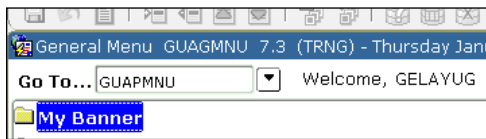
- 3) Do this for each form you want to have a shortcut.
- 4) In order for the shortcuts to show up in your My Banner folder, you must exit INB and then login again.
- 5) To see your shortcuts, expand the **My Banner** folder and your form shortcuts should now appear.



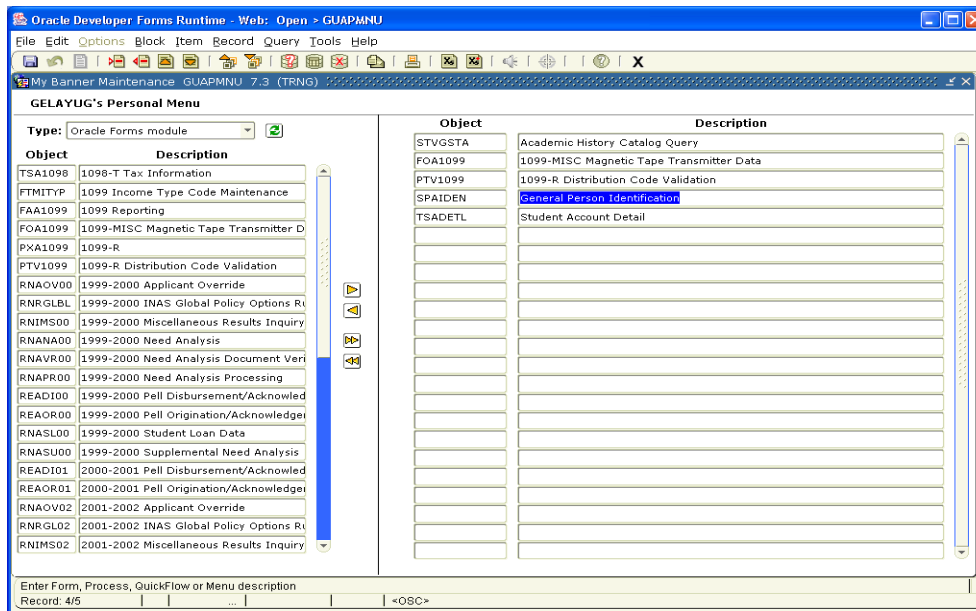
How to Delete Shortcuts from your My Banner folder

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.



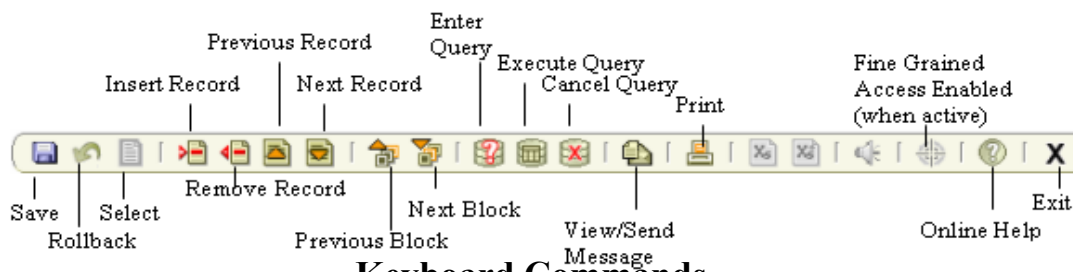
All the shortcuts currently showing up in **My Banner** are listed on the right-side of the form.

- 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



Keyboard Commands

- NOTE:**
1. *Not all keyboard commands are available on every Banner form.*
 2. *Mac systems require a setup change for use of F9 and F10 keys (see back of this page for instructions).*

Function	Keys
Block – 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

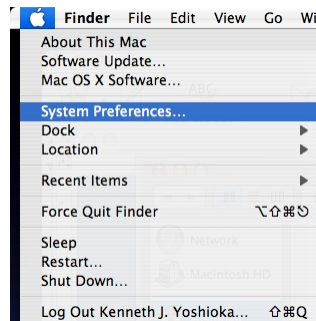
Macintosh Considerations for Use of Keyboard Commands in Banner:

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.



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

From:

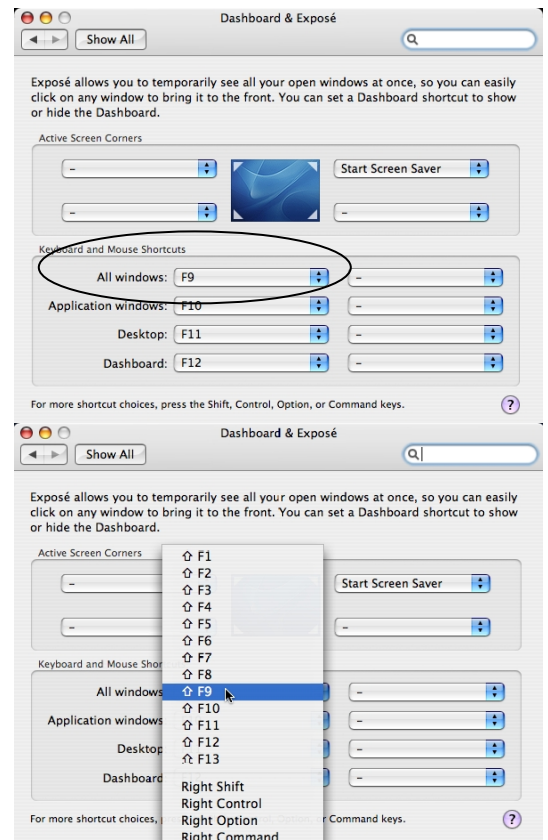
All windows: F9
Application windows: F10

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.

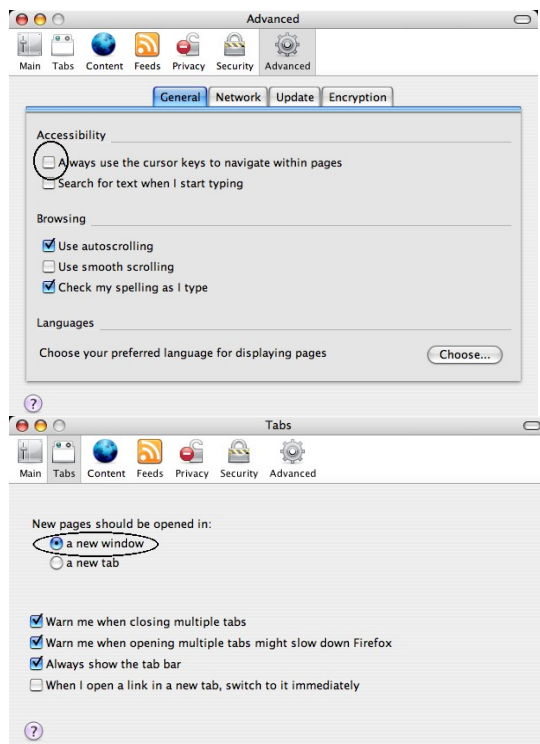
Xtender will contain all former, current, and prospective student files, as dictated by the record retention policies of the University, as well as documents pertaining to other departments, such as Human Resources and Advancement. These documents are separated into different “applications” (or file 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.

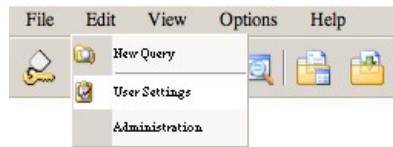
Viewing and Printing Documents

*Note for Mac users: The preferred browser for using Xtender on a Mac is Firefox 3.6.x and the preferences for using the cursor 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 cursor keys to navigate within pages**. **Always use the cursor 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.*

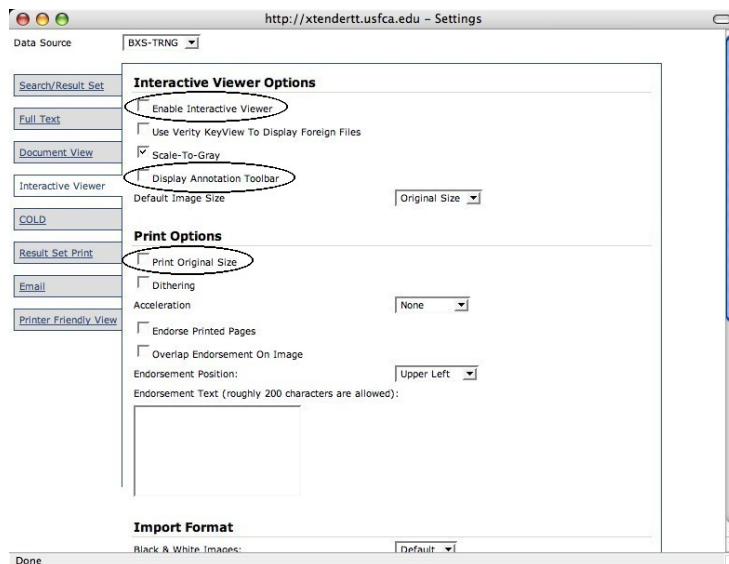


NOTE: If you have a pop-up blocker, you must disable it first or add the URL (*.usfca.edu) to your “allow pop-ups” list. With some pop-up blockers, you can just hold down the CTRL key while you click on the link.

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.



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**.



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.



USF Banner 8 TEST - Banner ERP System: Open > SAAADMS

File Edit Options Block Item Record Query Tools Help

Admissions Application SAAADMS 8.2 (TRNG8)

ID: 210009505 | Graber, Cynthia | Term: | View Current/Active Curricula

Application Curricula Fees, Mail Submission, Withdrawal Data Checklist Sources, Interests, Comments Contacts, Cohorts, Attributes

Application

Entry Term: 199510 | Fall 1994 | Application Number: 1 | Application Preference: | Application Date: 13-DEC-1993

Admission Type: ST Standard | Student Type: N New First Time | Application Status: D Decision Made | Application Status Date: 19-JAN-1995

Residence: O Out of state Resident | Maintained By: S SYSTEM | Application Decision: 35 Applicant Acceptance | Application Decision Date: 14-MAR-1994

Site: | Full or Part Time: Full Time Part Time None | Maintained By: U USER | Outstanding Requirements: |

Curricula Summary- Primary

Priority Term	Program	Catalog	Level	Campus	College	Degree
1	199510	199510	Undergraduate		College of Business	Bachelor of Business

Field of Study Summary

Priority Term	Type	Field of Study	Department	Attached to Major
1	Major	Accounting	Accounting	

Entry term: press LIST for valid codes, DUPLICATE ITEM for prospect summary.
Record: 1/1 | ... | <OSC>

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.

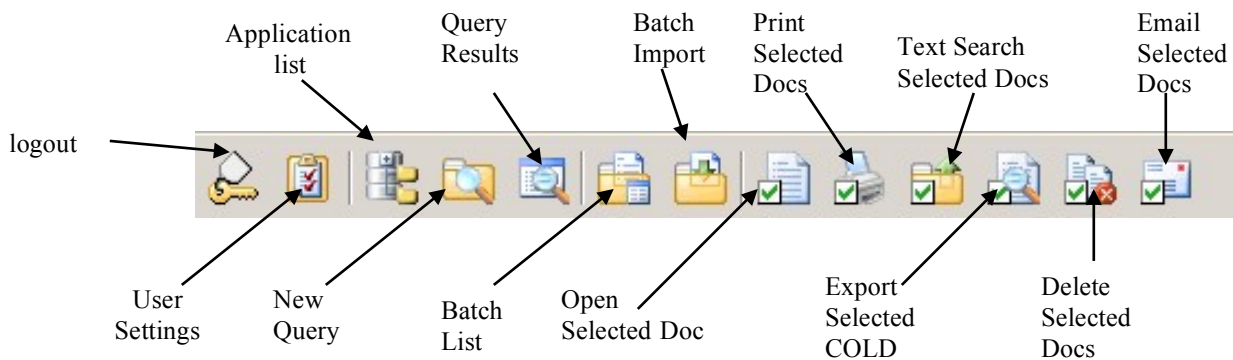
File Edit View Options Help

Query Results for Application 'B-S-ADMN'

Document 1 - 9 of 9

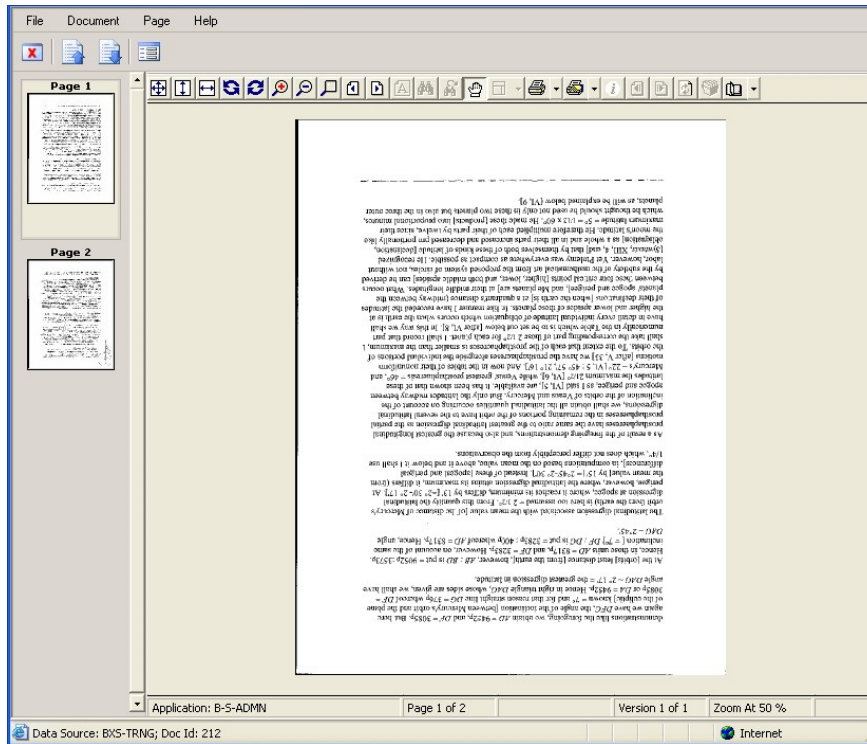
ID	PIDM	DOCUMENT TYPE	LAST NAME	FIRST NAME	SSN	BIRTH DATE	TERM CODE	APPLICATION NUMBER	ADMISSIONS REQUIREMENT
A00011030	31055	ADMISSIONS REQS	COPERNICUS	NICOLAUS		05-Apr-1473	200720	1	TOFL
A00011030	31055	ADMISSIONS APP	COPERNICUS	NICOLAUS		05-Apr-1473			
A00011030	31055	SUPPLEMENTAL INFO	COPERNICUS	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	

Xtender and Query List toolbar



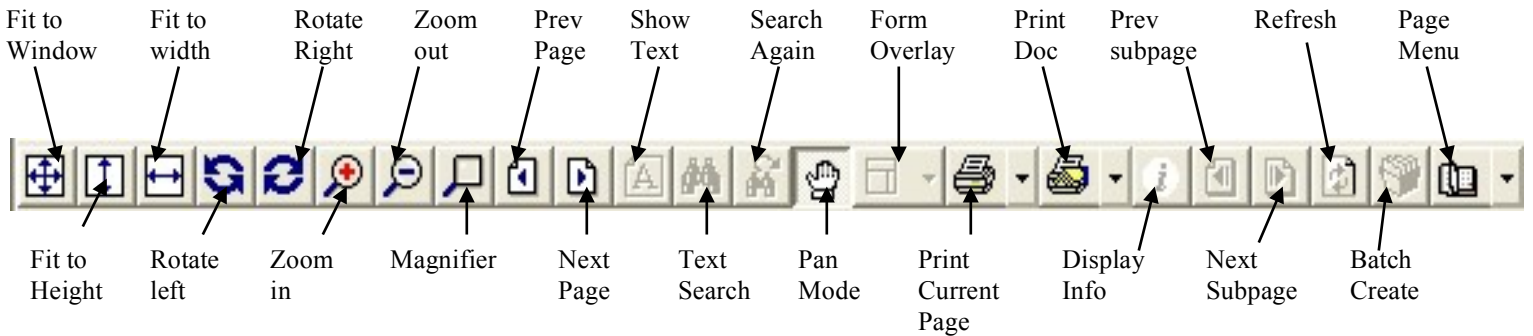
6. If you wish to print one or more documents, check off each of the documents you want to print, then click on the Options menu and select Print Selected Items or click on the equivalent item from the toolbar. This function is enabled on Windows only.
7. If you wish to view the document(s), you have 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 drop-down 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.

- 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.

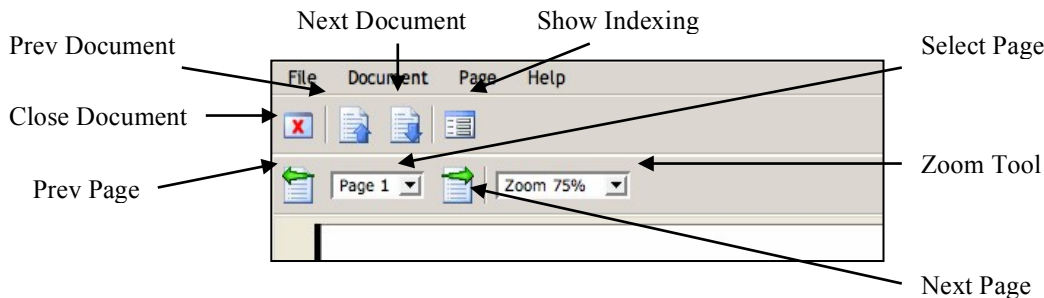


Document View with Interactive Toolbar-PC

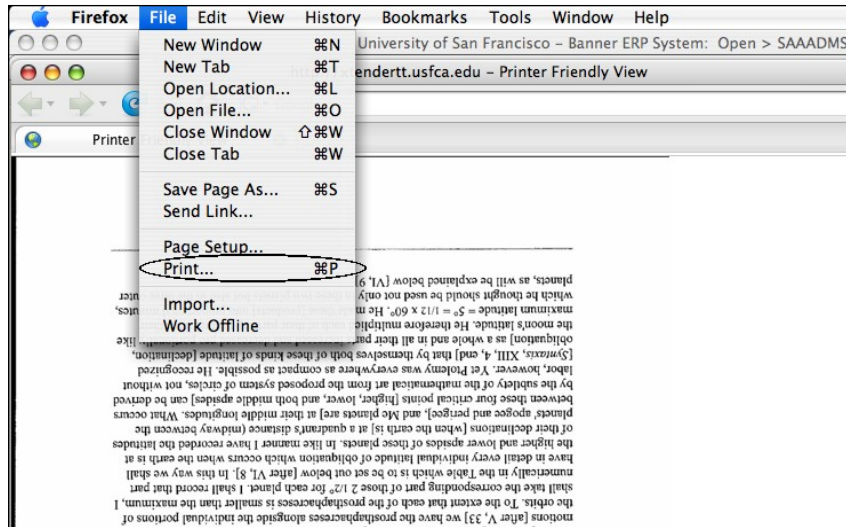
Interactive Toolbar-PC only



Document View Toolbar-Mac



- 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.



- 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.
- To do a new query, click on the **New Query** icon on the toolbar.



Show	Index Name	Search Value
<input checked="" type="checkbox"/>	ID	<input type="text"/>
<input checked="" type="checkbox"/>	PIDM	<input type="text"/>
<input checked="" type="checkbox"/>	DOCUMENT TYPE	*
<input checked="" type="checkbox"/>	LAST NAME	<input type="text"/>
<input checked="" type="checkbox"/>	FIRST NAME	<input type="text"/>
<input checked="" type="checkbox"/>	SSN	<input type="text"/>
<input checked="" type="checkbox"/>	BIRTH DATE	<input type="text"/>
<input checked="" type="checkbox"/>	TERM CODE	*
<input checked="" type="checkbox"/>	APPLICATION NUMBER	<input type="text"/>
<input checked="" type="checkbox"/>	ADMISSIONS REQUIREMENT	*
<input checked="" type="checkbox"/>	INSTITUTION NUMBER	<input type="text"/>
<input checked="" type="checkbox"/>	ROUTING STATUS	*
<input checked="" type="checkbox"/>	ACTIVITY DATE	<input type="text"/>

AND OR

Full-Text Query Criteria
 Search Type: All Words Any Words Exact Phrase Expression

User: YOSHIOKA; DataSource: BXS-TRNG; Application: B-S-ADMIN

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.