

Banner General Navigation and Fundamentals Training Workbook

*May 2005
Release 7.1*



SUNGARD HIGHER EDUCATION

What can we help you achieve?

Confidential Business Information

This documentation is proprietary information of SunGard Higher Education and is not to be copied, reproduced, lent or disposed of, nor used for any purpose other than that for which it is specifically provided without the written permission of SunGard Higher Education.

Prepared By: SunGard Higher Education
4 Country View Road
Malvern, Pennsylvania 19355
United States of America

© 2004-6 SunGard. All rights reserved. The unauthorized possession, use, reproduction, distribution, display or disclosure of this material or the information contained herein is prohibited.

In preparing and providing this publication, SunGard Higher Education is not rendering legal, accounting, or other similar professional services. SunGard Higher Education makes no claims that an institution's use of this publication or the software for which it is provided will insure compliance with applicable federal or state laws, rules, or regulations. Each organization should seek legal, accounting and other similar professional services from competent providers of the organization's own choosing.

Without limitation, SunGard, the SunGard logo, Banner, Campus Pipeline, Luminis, PowerCAMPUS, Matrix, and Plus are trademarks or registered trademarks of SunGard Data Systems Inc. or its subsidiaries in the U.S. and other countries. Third-party names and marks referenced herein are trademarks or registered trademarks of their respective owners.



Table of Contents

Section A: Introduction	5
Overview	5
Banner Product Suite.....	6
Section B: Banner Forms	7
Overview	7
What is a Form?	8
Types of Forms.....	11
Naming Conventions	20
Form Components	27
Wildcards.....	36
Dialog and Alert Boxes	37
Self Check	38
Answer Key.....	40
Section C: Main Menu	42
Overview	42
Banner Main Menu.....	43
Hierarchical Menu	45
Accessing Forms	47
QuickFlows	55
My Banner.....	56
Self Check	57
Answer Key.....	59
Section D: Menu Bars	61
Overview	61
Menu Bar Overview	62
Pull Down Menus.....	63
Self Check	78
Answer Key.....	79
Section E: Toolbar	80
Overview	80
Toolbar Overview.....	81
Default Icons	82
Self Check	83
Answer Key.....	84



Table of Contents (Continued)

Section F: Help Features	85
Overview	85
Online Help	86
Dynamic Help.....	91
Banner Bookshelf	92
Help (Item Properties).....	95
Auto Hint/Status Line.....	97
Self Check	98
Answer Key	100



Section A: Introduction

Lesson: Overview

◀ [Jump to TOC](#)

Workbook goal

The goal of this workbook is to provide you with the knowledge and practice to accurately navigate through Banner. This workbook is divided into five sections:

- Banner Forms
- Main Menu
- Menu Bar
- Toolbar
- Help features

Intended audience

All Banner users.

Prerequisites

Before completing this course, you should have familiarity with

- using a computer and mouse
- Microsoft Windows Navigation.

Section contents

Overview	5
Banner Product Suite	6



Section A: Introduction

Lesson: Banner Product Suite

◀ Jump to TOC

Introduction

What is the Banner product suite?

- All-encompassing internet-native software applications for the higher education community.
- Supports functions that need to be carried out for an institution to run efficiently.
- Comprised of various Banner products that have the ability to interface with each other for the purpose of accomplishing necessary tasks.

Suite products

The Banner product suite consists of six products. Your institution may have licensed all or only some of the products.

- General*
- Advancement
- Finance
- Financial Aid
- Human Resources -- Payroll/Position Control
- Student

* Included when any of the other products are licensed.

Interfacing Banner products

Banner products have the ability to interface with each other for the purpose of sharing information and making transactions.

Example: The Banner Human Resources system will interact with the Banner Student system to find out which students are employed and how much they should be getting paid.



Section B: Banner Forms

Lesson: Overview

◀ [Jump to TOC](#)

Introduction

The purpose of this section is to familiarize users with how Banner forms are set up, named, and the different components that make up the form.

Objectives

After completing this section, you will be able to

- describe areas on the form
- define types of forms
- explain the naming convention for forms
- explain parent-child relationships
- describe fields, blocks, and records
- search for items in a database.

Section contents

What is a Form?	8
Types of Forms.....	11
Naming Conventions.....	20
Form Components	27
Wildcards.....	36
Dialog and Alert Boxes	37
Self Check	38
Answer Key	40



Section B: Banner Forms

Lesson: What is a Form?

◀ Jump to TOC

Introduction

A form is an online document where you can enter and look up information in your database. A form visually organizes information so it is easier to enter and read. A Banner form is similar to a paper form, except information is entered once and then used by other forms, reports, and jobs.

Forms can include windows, dialog boxes, and alert boxes.

Banner form example

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Tools Window Help

General Person Identification SPAIDEN 7.0 (s4b70)

ID: Generate ID:

Current Identification Alternate Identification Address Telephone Biographical E-mail Emergency Contact

ID: Name Type:

Person

Last Name:

First Name:

Middle Name:

Prefix:

Suffix:

Preferred First Name:

Full Legal Name:

Non-Person

Name:

ID and Name Source

Last Update

User:

Activity Date:

Origin:

Original Creation

User:

Create Date:

ID number; LIST for person; COUNT HITS for non-person; DUP ITEM to generate ID; DUPLICATE RECORD for Alternate ID look-up.

Record: 1/1 | ... | <OSC>



Section B: Banner Forms

Lesson: What is a Form? (Continued)

◀ Jump to TOC

Parts of a form

The screenshot shows an Oracle Developer Forms Runtime window titled 'General Person Identification SPAIDEN 7.0 (s4b70)'. The form contains several components labeled with red arrows and text:

- Title Bar:** Points to the top bar containing the form name, ID, and software version.
- Search Icon:** Points to a magnifying glass icon labeled 'Generate ID:'.
- Key block:** Points to a bracketed area containing the 'Generate ID:' icon and the 'Generate ID:' text.
- Information block:** Points to a bracketed area containing the 'Generate ID:' icon and the 'Generate ID:' text.
- Field:** Points to a text input field for 'Last Name' in the 'Alternate Names or IDs' section.
- Pull-down list:** Points to a dropdown menu for 'Name Type' in the 'Alternate Names or IDs' section.

The form also features tabs for 'Current Identification', 'Alternate Identification', 'Address', 'Telephone', 'Biographical', 'E-mail', and 'Emergency Contact'. The 'Alternate Identification' tab is active, showing three entries for 'Alternate Names or IDs' with fields for Name Type, ID, Last Name, First Name, Middle Name, Origin, User, Activity Date, Create User, and Create Date.

Part	Description
Title Bar	May display the form's descriptive name, the seven-character ID name, the software version number and the database name.
Search Icon	Calls up the set-up form that contains the pre-entered data for you to select an ID.
Key block	Contains information that determines what is entered or displayed on the remainder of the form.
Information block	Displays data about the information entered in the Key Block. Area where you enter information prior to updating a record.
Field	Area on a form where you can enter, query, change, and display specific information.
Pull-down list	Used to select a field value from a list of pre-defined values. A down arrow in the right side of the field indicates that the field has a pull-down list.
Tabs	Tabs are used to arrange information in a meaningful way, and allow you to navigate easily between groups or blocks of information.



Section B: Banner Forms

Lesson: What is a Form? (Continued)

◀ Jump to TOC

Parts of a form, continued

Part	Description
Radio Button	Used to select one of several options. Only one radio button can be selected at a time.
Checkbox	Used to enable or disable features or options.



Section B: Banner Forms

Lesson: Types of Forms

◀ [Jump to TOC](#)

Form categories

Based on their usage, forms can be categorized as being either a set-up or day-to-day form. Set-up forms need to be completed during implementation and before day-to-day forms are used. Generally, access to set-up forms is restricted to a few users.

Form types

Different form types are associated with the form categories.

Categories	Users	Types
Setup	Administrator and/or Staff	<ul style="list-style-type: none">• Rule• Validation• Control
Day-to-Day	Staff	<ul style="list-style-type: none">• Inquiry• Application• Query• Maintenance• Wizard



Section B: Banner Forms

Lesson: Types of Forms (Continued)

◀ Jump to TOC

Validation form

Validation forms are used to define the values that can be entered in specific fields on application validation, or rule forms. These values make up a field's List of Values (LOV).

Banner uses LOVs to validate many fields. When the cursor is in a field that must be validated, **List of Values** appears in the status line, indicating that the entry must come from the LOV. If you try to enter a value that isn't in the LOV, an auto hint message appears.

Most validation forms are completed when Banner is implemented. If your security level permits, you can use a validation form to enter new values or update existing ones. Remember, you can only change values on a validation form, not through an LOV window.

Validation form example

ZIP or Postal Code	City	County	State or Province	Nation	Activity Date
00603	Agilia Test		PR		18-NOV-2004
00802	Saint Thomas		VI		08-NOV-2004
00983	Carolina		PR		03-MAR-2004
01040	Holyoke test		MA		17-NOV-2004
01063	Northampton		MA		17-NOV-2004
01247	North Adams		MA		05-MAY-2004
01301	Greenfield		MA		03-MAR-2004
01440	Gardner		MA		03-MAR-2004
01610	Worcester		MA		03-MAR-2004
01923	Danvers		MA		03-MAR-2004
02116	Boston		MA		10-NOV-2004
02138	Cambridge		MA		03-MAR-2004
02139	Cambridge		MA		03-MAR-2004
02154	Waltham		MA		03-MAR-2004
02180	Stoneham		MA		27-JUL-2004
02181	Wellesley		MA		03-MAR-2004
02186	Milton		MA		03-MAR-2004
02720	Fall River		MA		03-MAR-2004
02747	North Dartmouth		MA		03-MAR-2004
02766	Norton		MA		03-MAR-2004
02886	Warwick		RI		03-MAR-2004
02912	Providence		RI		03-MAR-2004

Validation form key points

- Used to create choices in Rule, Application, and/or Query forms.
- Values make up a field's List of Values (LOV).
- Defined when your system is installed.
- Can be added to or altered with discretion.
- May require clearance.



Section B: Banner Forms

Lesson: Types of Forms (Continued)

◀ Jump to TOC

Control form

Control forms are used to define the processing rules for application and validation forms at the system level. You can enter new controls or revise existing ones if your security level permits.

Control form example

File Edit Options Block Item Record Query Tools Window Help

Installation Controls GUAINST 7.0 (s4b70)

Name:	BANNER University	ZIP/Postal Code Length:	<input type="checkbox"/>
Address:	Systems & Computer Technology Four Country View Road Great Valley Corporate Center	Base Currency:	USD United States Dollar
Nation:	Malvern PA 19355 157 United States of America	Maximum Number of Open Forms:	<input type="checkbox"/>
Phone:	215 6475930	Century Pivot:	49
Operating/System:	UNIX	Default Date Format:	<input checked="" type="radio"/> MDY <input type="radio"/> DMY <input type="radio"/> YMD
Installation Type:	Higher Education	System/Process Enable Indicators:	<input checked="" type="checkbox"/> Online Matching Process Enabled <input checked="" type="checkbox"/> Workflow Enabled <input type="checkbox"/> SQL Trace Enabled <input type="checkbox"/> Messaging Enabled
Instance Name:	s4b70		
Activity Date:	19-JAN-2005		

Installation Information		Release	Date	Release	Date
<input checked="" type="checkbox"/> Advancement		7.0	12-AUG-2004	<input checked="" type="checkbox"/> Finance	7.0 25-AUG-2004
<input checked="" type="checkbox"/> Accounts Receivable		7.0	25-AUG-2004	<input checked="" type="checkbox"/> Human Resources	7.0 12-AUG-2004
<input checked="" type="checkbox"/> Financial Aid		7.0	31-AUG-2004	<input checked="" type="checkbox"/> Position Control	7.0 12-AUG-2004
<input type="checkbox"/> Other Financial Aid				<input checked="" type="checkbox"/> Student	7.0 31-AUG-2004
GENERAL		7.0	10-AUG-2004		

Control form key points

- Used to define processing rules for application and validation forms at the system level.
- Enter new controls or revise existing ones.
- Must have clearance to do so.



Section B: Banner Forms

Lesson: Types of Forms (Continued)

◀ Jump to TOC

Maintenance form

Maintenance forms are used regularly to reflect changes/updates that will effect information in Banner.

Maintenance form example

General User Preferences Maintenance GUAUPRF 7.1

Display Options Directory Options My Links Menu Settings LDAP

Display Options

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

Alert Options

- Prompt Before Exiting Banner
- Display Additional Confidential Warning
- Display Additional Deceased Warning

User Interface Color Settings

Description: Enter the RGB color code for non iconic buttons.
Default Value: r204g204b153
User Value: [dropdown]

Description: Enter the RGB color code for the canvas.
Default Value: r255g255b255
User Value: r255g255b255 [dropdown]

Description: Enter the RGB color code for code/description prompts.
Default Value: r0g0b0
User Value: [dropdown]

Description: Enter the RGB color code for the menu links canvas.
Default Value: r255g255b255
User Value: [dropdown]

Description: Enter the RGB color code for the menu broadcast message canvas.
Default Value: r255g255b255
User Value: [dropdown]



Section B: Banner Forms

Lesson: Naming Conventions

◀ Jump to TOC

The seven-character form name

Every form has an abbreviated seven-character form name. Most of the time, forms are referred to by this seven-character form name.

Position 1

- Identifies the Banner product owning the form, report, process or table.
- Products are Accounts Receivable, Advancement, Finance, Financial Aid, General, Human Resources, Student and Technical.

The following table contains the codes for various Banner products.

Code	Product/Purpose
A	Advancement
B	Property Tax
C	Courts
D	Cash Drawer
F	Finance
G	General
K	Work Management
L	Occupational Tax and License
N	Position Control
O	Customer Contact
P	Payroll
Q	Electronic Work Queue
R	Financial Aid
S	Student (shared)
T	Accounts Receivable
U	Utilities
V	Voice Response
X	Records Indexing
W, Y, Z	Reserved for Client Applications



Section B: Banner Forms

Lesson: Naming Conventions (Continued)

◀ Jump to TOC

Position 2

- Identifies the application module owning the form, report, process or table.
- Unique to the product identified in position 1.
- For each Banner product, the second position would be one of the following codes.

Code	Product/Purpose
Position 2 for Banner Advancement	
A	Membership
D	Designation
E	Event Management
F	Campaign
G	Pledge and Gift/Pledge Payment
L	Label
M	Prospect Management
O	Organization
P	Constituent/Person
S	Solicitor Organization
T	Validation form/table
U	Utility
V	Reserved-Canadian Solution Center
X	Expected Matching Gift
Position 2 for Banner Financial Aid	
B	Budgeting
C	Record Creation
E	Electronic Data Exchange
F	Funds Management
H	History and Transcripts
J	Student Employment
L	Logging
N	Need Analysis
O	Common Functions
P	Packaging and Disbursements
R	Requirements Tracking
S	Student System Shared Data
T	Validation form/table
U	Utility
V	Reserved-Canadian Solution Center



Section B: Banner Forms

Lesson: Naming Conventions (Continued)

◀ Jump to TOC

Position 2, continued

Code	Product/Purpose
Position 2 for Banner HR/Payroll (P) Position Control (N)	
A	Application
B	Budget
C	COBRA
D	Benefit/Deductions
E	Employee
H	Time Reporting/History
O	Overall
P	General Person
R	Electronic Approvals
S	Security
T	Validation/rule table
U	Utility
V	Reserved-Canadian Solution Center
X	Tax Administration
Position 2 for Banner Finance	
A	Accounts Payable
B	Budget Development
C	Cost Accounting
E	Electronic Data Interchange
F	Fixed Assets
G	General Ledger
I	Investment Management
N	Endowment Management
O	Operations
P	Purchasing/Procurement
R	Research Accounting
S	Stores Inventory
T	Validation form/table
U	Utility
V	Reserved-Canadian Solution Center
X	Archive/Purge



Section B: Banner Forms

Lesson: Naming Conventions (Continued)

◀ Jump to TOC

Position 2, continued

Code	Product/Purpose
Position 2 for Banner General	
E	Event Management
J	Job Submission
L	Letter Generation
O	Overall
P	Purge
S	Security
T	Validation form/table
U	Utility
V	Reserved-Canadian Solution Center
X	Cross Product
Position 2 for Banner Student	
A	Admissions
C	Catalog
E	Support Services
F	Registration/Fee Assessment
G	General Student
H	Grades/Academic History
I	Faculty Load
K	Reserved for SCT International
L	Location Management
M	CAPP
O	Overall
P	Person
R	Recruiting
S	Schedule
T	Validation form/table
U	Utility



Section B: Banner Forms

Lesson: Naming Conventions (Continued)

◀ Jump to TOC

Position 2, continued

Code	Product/Purpose
Position 2 for Banner Accounts Receivable (R)	
F	Finance Accounts Receivable
G	General Accounts Receivable
O	Overall
R	Research Accounting
S	Student Accounts Receivable
T	Validation form/table
U	Utility
V	Reserved-Canadian Solution Center
Position 2 for Banner Information Access/Kiosk (I)	
R	Financial Aid
S	Student
Position 2 for Banner XtenderSolutions (E)	
T	Validation form/table
X	XtenderSolutions
Position 2 for Banner All Products	
W	Reserved for client forms or modules used within a Banner application
Y	(character in position 1 does not equal W, Y, or Z)



Section B: Banner Forms

Lesson: Naming Conventions (Continued)

◀ Jump to TOC

Position 3

- Identifies the type of form, report, process or table.
- Codes are the same for all Banner products.

Code	Type of Form/Process
A	Application
B	Base Table
I	Inquiry
P	Process
R	Rule Table, Repeating Table, Report or Process
V	Validation
M	Maintenance

Positions 4, 5, 6, 7

- Identifies a unique four-character code for the form, report, process or table.
- The following are some examples of four-character names.

Code	Purpose
***IDEN	Identification
***PINC	Position Incumbent
***STDN	Student Relation
***PERS	Person



Section B: Banner Forms

Lesson: Naming Conventions (Continued)

◀ Jump to TOC

Introduction

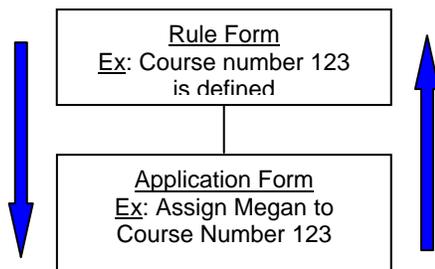
A relationship between types of forms is referred to as the parent-child relationship.

If information on a parent form has been assigned to a child form, the parent information cannot be deleted without deleting the child first.

Relationship	Forms
Parent	Rule and Validation
Child	Application and Query

Example

If a rule form has been assigned to an application form, the information on the rule form cannot be deleted without deleting the information on the application form first.



Note: A control form is considered neither a parent nor child form because it is used as more of a reference for processing than a rule. If you wanted to change a processing rule on a control form, it would affect only how the forms are processed after the control form is changed.



Section B: Banner Forms

Lesson: Form Components

◀ Jump to TOC

Introduction

All Banner forms are made up of three components: Records, Fields, and Blocks.

Blocks

A block is a section of a form or window that contains related information. If a form or window contains more than one block, each block (except the key block) may be enclosed in a beveled box.

Blocks:

- Group information
- Can be one or more on a screen
- May be organized on tabs within a form
- Think of as “sections” on a form

Example: A student’s record in SPAIDEN contains the following blocks: Current Identification, Person Name Information, and Non-Person Information.

Types of blocks

There are two types of blocks, a Key Block and an Information Block.

Part of Form	Description
Key block	<ul style="list-style-type: none">• Where you start on a form.• Every form has a Key block.• A unique code is entered such as an ID number, term code or document number.• Lets Banner know what piece of information you want to retrieve.• The rest of the information on the form will refer to the information that you enter on the Key block.
Information block	<ul style="list-style-type: none">• Section that contains related information to what was entered in the Key block.• A line may separate each Information block on the form.



Section B: Banner Forms

Lesson: Form Components (Continued)

◀ Jump to TOC

Screen image

Oracle Developer Forms Runtime - Web
File Edit Options Block Item Record Query Tools Window Help

General Person Identification SPAIDEN 7.0 (s+b70)

Confidential
D: 510000001 Allen, Matthew A. Generate ID:

Key block

Current Identification Alternate Identification Address Telephone Biographical E-mail Emergency Contact

Alternate Names or IDs **Information block**

Name Type	ID	Last Name	First Name	Middle Name	Change Type	Origin	User	Activity Date	Create User	Create Date
Nickname	510000001	Allen	Frank		Name		CNORRIS	29-NOV-2004	CNORRIS	29-NOV-2004
Nickname	510000001	Norris	Frank		Name		CNORRIS	04-NOV-2004	CNORRIS	04-NOV-2004
	LN0000028	Allen	Matthew	A.	ID	APAIDEN	SGEISER	28-OCT-2004	SGEISER	28-OCT-2004

Previous Name Type Code; press LIST for values.
Record: 1/? | ... | List of Valu... | <OSC>

Navigating blocks

To navigate in between blocks or tabs, you would use the Next Block or Previous Block functions. These are icons located on the toolbar in a form. If you prefer to use keystrokes for navigation, you can use Ctrl-Page Down to reach the Next Block or Ctrl-Page Up for the Previous Block.

Next Block



Previous Block





Section B: Banner Forms

Lesson: Form Components (Continued)

◀ Jump to TOC

Fields

Fields are labeled space within a block. You can enter, query, change and/or display specific information within a field.

ID:

There is usually more than one field on a form:

File Edit Options Block Item Record Query Tools Window Help

General Person SPAPERS 7.0 (s4b70)

ID:

Biographical

Gender: Male
 Female
 Not Available

Birth Date: **Field**

Age: **Field**

SSN/SIN/TIN: **Field**

Confidential
 Deceased
Deceased Date:

Citizenship:
Ethnicity:
Marital Status:
Religion:
Legacy:

Veteran File Number:
Veteran Category: None **Field**
Active Duty Separation Date:

Last Update
User:
Activity Date: **Field**



Section B: Banner Forms

Lesson: Form Components (Continued)

◀ Jump to TOC

Field states

The following list details the different states a field can be presented on a form.

Note: You may not be able to navigate to all fields within a form. On query-only forms, you frequently cannot move through any fields at all.

State	Example	Description
Enabled		<ul style="list-style-type: none">• Cursor is allowed in the field.• Information in the field is displayed in black text.
Disabled		<ul style="list-style-type: none">• Cursor is not allowed in the field.• If information exists, it cannot be changed



Section B: Banner Forms

Lesson: Form Components (Continued)

◀ Jump to TOC

Field values

Any data that is entered or displayed in a field is a value. There are two types of values as detailed in the chart below.

Note: The names of the fields that have a pre-defined value, or LOV, have a drop down arrow next to the field. Fields that you can search for a value in the database also have a drop-down arrow next to the field. The most common example is the ID field on the %Iden forms.

Citizenship:	<input type="text" value="Y"/>	▼ Citizen
Ethnicity:	<input type="text" value="1"/>	▼ Caucasian
Marital Status:	<input type="text" value="M"/>	▼ Married

Type	Description	Example
Free-format	Free access to type in whatever information is required. Not previously defined on a validation form.	Street addresses.
List of Values (LOV)	Data on the LOV comes from previously defined values on a validation form. When you double-click on a LOV field. Use a Search icon or press the F9 key, previously defined values are displayed.	State codes – FL, PA, DE.
Search Field	If a field is a search field you must click the search icon to search.	ID, Last Name, First Name.



Section B: Banner Forms

Lesson: Form Components (Continued)

◀ Jump to TOC

Navigating fields

To navigate between fields, use the next and previous keystrokes as detailed below.

Note: You may also navigate between fields using the item pull-down menu on the menu bar.

Function	Command
Next field	Tab or Enter
Previous field	Shift + Tab

Records

A record is a group of fields that make up a logical unit. There may be more than one record in a block.

Example: A person record is made up of several fields: ID, Last Name, First Name, Middle Name, Birth Date, Change Indicator, Type

Banner form

ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Type
A00020654	Allen	Bancroft				
A00020655	Allen	Elise		03-MAR-1983		
311115555	Allen	Frank		29-JUN-1977	N	NICK
311116666	Allen	Frank		27-APR-1962	N	NICK
510000001	Allen	Frank		11-JUL-1939	N	NICK
A00020656	Allen	Harold		10-OCT-1985		
510000003	Allen	Kathleen	Evans	17-JAN-1991		
A00000061	Allen	Marissa	B	07-DEC-1982		
510000000	Allen	Mary		10-JUL-1951	N	
444555555	Allen	Matthew	A.	11-JUL-1939	I	

Record counter

The record counter displays number of records viewed and the number of total records.

Note: A question mark in the status line signifies that there are more records, but you haven't gotten to the last one, so the computer doesn't know how many there are yet.

Record: 8/?



Section B: Banner Forms

Lesson: Form Components (Continued)

◀ Jump to TOC

Viewing records

Some forms have a scroll bar to view existing records.

File Edit Options Block Item Record Query Tools Window Help

Employee Search Form (Employee, Applicant, COBRA) POIIDEN 7.0 (s4b70)

ID	Last Name	First Name	Middle Name	Change Indicator	Type	Birth Date
WTE000014	& Adams	Beth		N		09-NOV-1985
WTE000012	& Adams	Nicholas		N		09-NOV-1980
156000007	& Carrington	Julia	M	N		01-JAN-1975
WTE000014	< Adams	Beth		N		09-NOV-1985
TESTAPIHR	API	HR				01-JAN-1970
TESTAPIH1	API	Mar*				08-SEP-1976
012420050	Abercrombie	Sean			FRML	15-MAR-1963
WTE000006	Adams	April				09-NOV-1980
WTE000014	Adams	Beth		N		09-NOV-1985
WTE000014	Adams	Beth				09-NOV-1985
HRCLIENT1	Adams	Cindy			LEGL	09-NOV-1982
WTE000017	Adams	Daniel				09-NOV-1980
WTE000016	Adams	Deb				09-NOV-1980
DRC000004	Adams	Dee				09-NOV-1983
WTE000008	Adams	Emma				09-NOV-1980
SCT000101	Adams	Eugene	Middle			19-OCT-1944
WTE000001	Adams	James		N		09-NOV-1980
WTE000015	Adams	Josh				09-NOV-1985
DRC000101	Adams	Kelly				09-NOV-1982



Section B: Banner Forms

Lesson: Form Components (Continued)

◀ Jump to TOC

Navigating records

You can navigate to different records one of three ways:

1. Use the Next Record or Previous Record functions located on the toolbar in a form.

Next Record



Previous Record



2. Use the record pull-down menu in the menu bar.
3. Use the keys on the keyboard to navigate through records.

Function	Command
Next record	Down-arrow
Previous record	Up-arrow



Section B: Banner Forms

Lesson: Wildcards

◀ Jump to TOC

Searching for items in a database

A wildcard is a special character that represents one or more other characters. Use wildcard symbols % and _ in the search criteria.

- % (percent sign) represents any number of characters
- _ (underscore) represents one occurrence of a character

Note: ma is used as an example. The wildcard symbols can be used with any combination of letter in any order.

To get these results...	Enter these criteria...
All entries that contain ma	%ma%
All entries that begin with ma	ma%
All entries that end with ma	%ma
All entries that have m as a second character	_m%



Section B: Banner Forms

Lesson: Dialog and Alert Boxes

◀ Jump to TOC

Pop-up boxes

Pop-up boxes are windows that appear on your screen for a specific purpose. All popup boxes require that you take action before continuing on the form.

Types of pop-up boxes

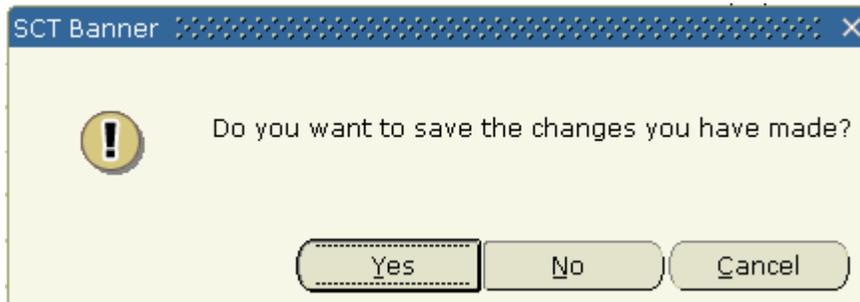
There are two types of Pop-up boxes.

- Dialog Box
- Alert Box

Dialog box

A dialog box appears when you must chose from two or more responses.

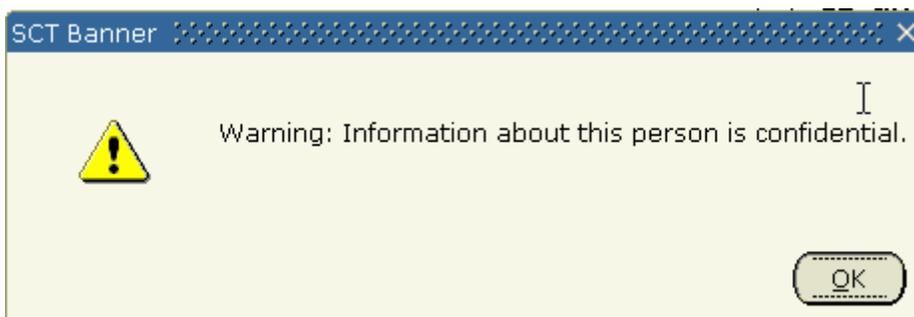
The following is an example of a dialog box.



Alert box

An alert box notifies you of a condition that may impact data.

The following is an example of an alert box.





Section B: Banner Forms

Lesson: Self Check

◀ Jump to TOC

Directions

Answer the following questions. Try to do this without using your workbook notes.

Question 1

Content in the Information Block determines what is entered or displayed on the rest of the form.

True or False

Question 2

A form is a document in which you enter and look up information stored in your database.

True or False

Question 3

Which of the following options allow you to enter data?

- a) Field
- b) Pull-down list
- c) Radio button
- d) Checkbox

Question 4

A validation form allows you to define processing rules.

True or False

Question 5

Few forms have a specific seven-character code.

True or False



Section B: Banner Forms

Lesson: Self Check (Continued)

◀ [Jump to TOC](#)

Question 6

Position two in the seven-character code identifies the application module owning the form, report, process or table.

True or False

Question 7

If a parent form has been assigned to a child form, the child form cannot be deleted without deleting the parent first.

True or False

Question 8

Most forms have a Key block.

True or False

Question 9

Using an underscore in the search criteria represents which of the following?

- a) Any number of characters.
- b) One occurrence of a character.
- c) Two occurrences of a character.
- d) All characters.

Question 10

This box will notify you of a condition that may impact data.

- a) Direct Access
- b) Alert
- c) Element
- d) Dialog



Section B: Banner Forms

Lesson: Answer Key

◀ Jump to TOC

Question 1

Content in the Information Block determines what is entered or displayed on the rest of the form.

False. Content in the Key Block determines what is entered or displayed on the rest of the form.

Question 2

A form is a document in which you enter and look up information stored in your database.

True.

Question 3

Which of the following options allow you to enter data?

- a) **Field**
- b) Pull-down list
- c) Radio button
- d) Check box

Question 4

A validation form allows you to define processing rules.

False. Control forms allow you to define processing rules.

Question 5

Few forms have a specific seven-character code.

False. All forms have a seven-character code.

Question 6

Position two in the seven-character code identifies the application module owning the form, report, process or table.

False. Position 1 identifies the application module owning the form, report, process or table.



Section B: Banner Forms

Lesson: Answer Key (Continued)

◀ [Jump to TOC](#)

Question 7

If a parent form has been assigned to a child form, the child form cannot be deleted without deleting the parent first.

False. The child form must be deleted first, then the parent form.

Question 8

Most forms have a Key block.

False. All forms have a Key block.

Question 9

Using an underscore in the search criteria represents which of the following?

- a) Any number of characters.
- b) One occurrence of a character.**
- c) Two occurrences of a character.
- d) All characters.

Question 10

This box will notify you of a condition that may impact data.

- a) Direct Access
- b) Alert**
- c) Element
- d) Dialog



Section C: Main Menu

Lesson: Overview

◀ [Jump to TOC](#)

Introduction

The purpose of this section is to familiarize the user with the Banner Main Menu and its components.

Objectives

After completing this section, you will be able to

- describe the areas of the Banner Main Menu
- navigate through the Main Menu hierarchical structure
- utilize methods for accessing forms
- define and run a QuickFlow
- create, change, and copy My Banner.

Section contents

Overview	42
Banner Main Menu.....	43
Hierarchical Menu.....	45
Accessing Forms	47
QuickFlows	55
My Banner.....	56
Self Check	57
Answer Key.....	59



Section C: Main Menu

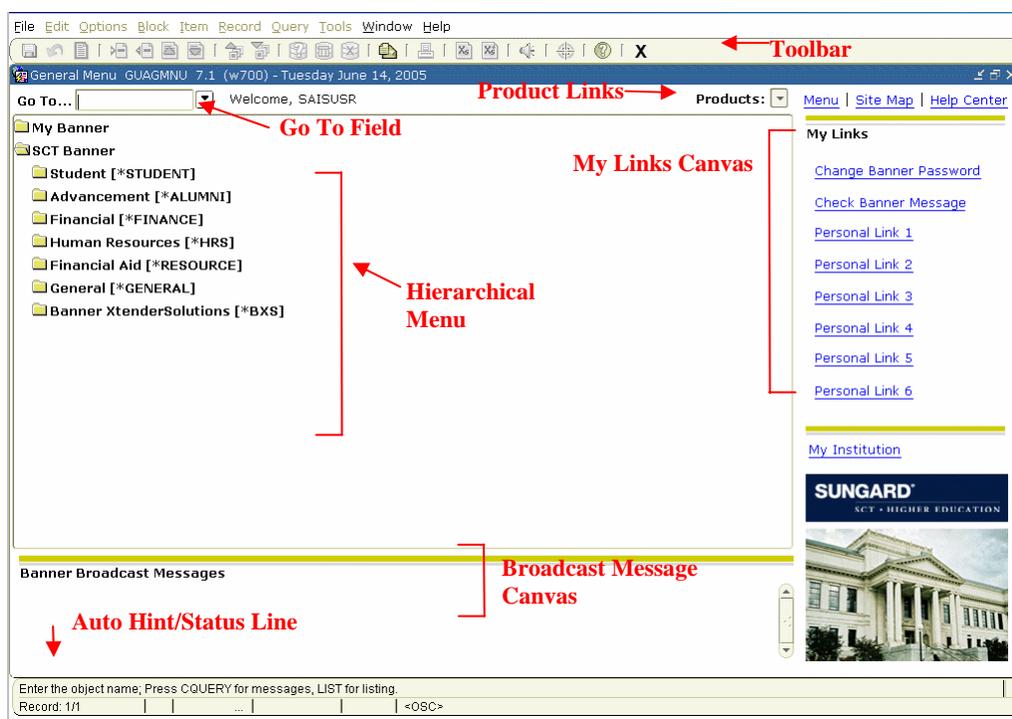
Lesson: Banner Main Menu

◀ Jump to TOC

Introduction

The Main Menu provides an overview of the menus, forms, jobs and QuickFlows on Banner. You use the Main Menu to navigate through Banner.

Parts of the main menu





Section C: Main Menu

Lesson: Banner Main Menu (Continued)

◀ Jump to TOC

Parts description

The following chart details the different areas of the main menu.

Menu Part	Description						
Menubar	Offers a variety of options for navigating within Banner. However, from the main menu, the options are limited.						
Object Search	Access a form, job, or QuickFlow if you know part of its name, description or type.						
	<table border="1"> <thead> <tr> <th>IF</th> <th>THEN</th> </tr> </thead> <tbody> <tr> <td>You use object search from a form</td> <td>The current form remains open</td> </tr> <tr> <td>You exit the requested object</td> <td>You return to the original form</td> </tr> </tbody> </table>	IF	THEN	You use object search from a form	The current form remains open	You exit the requested object	You return to the original form
IF	THEN						
You use object search from a form	The current form remains open						
You exit the requested object	You return to the original form						
Toolbar	Set of icons that represent shortcuts for performing common functions from the main menu.						
Auto Hint/Status Line	<ul style="list-style-type: none"> Describes the field where the cursor is located. Displays error and processing messages. Explains the purpose of the field, what can be done next, or how to access another window or form. 						
Hierarchical Tree Menu Structure	Access forms through the main menu hierarchical tree structure.						
Product Links	Access contents of various Banner products directly.						
My Links Canvas	<p>The Change Banner Password link goes to the Oracle Password Change Form (GUAPSWD), where you can change your password.</p> <p>The Check Banner Message link takes you to the Banner Message Form (GUAMESG), where you can view your messages. A green check mark appears next to the link when you initially log in and have pending messages, or whenever a new message arrives. The pop-up alert for new messages is no longer displayed.</p> <p>Personal links enable you to create up to six links to favorite URLs or often-used Banner objects.</p>						
Broadcast Message Canvas	The Broadcast Message button on the toolbar becomes enabled whenever you receive a broadcast message. You can view your message(s) in the Broadcast Messages section at the bottom of the screen.						



Section C: Main Menu

Lesson: Hierarchical Menu

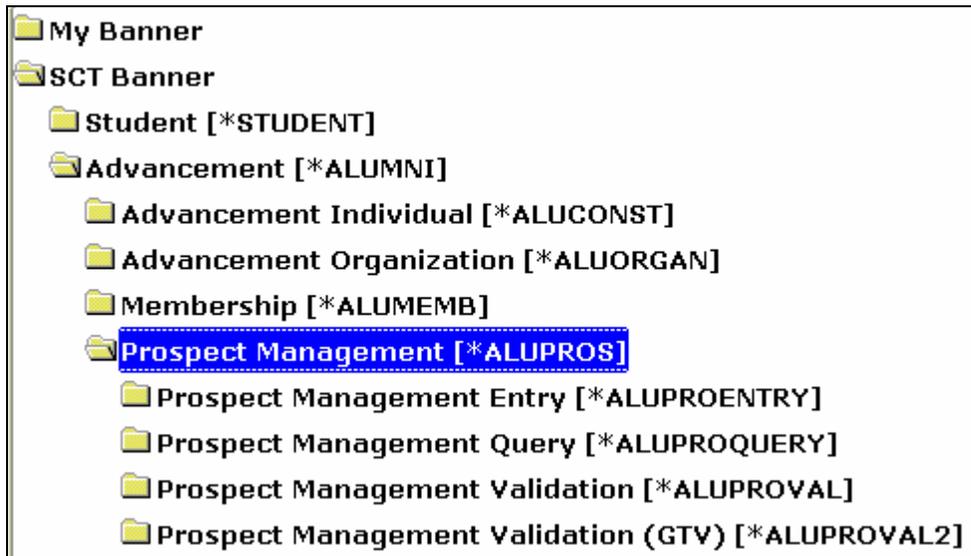
◀ Jump to TOC

Introduction

When accessing Forms from the Main Menu they are displayed as a hierarchy. You can expand and collapse content by clicking on the folders.

Closed folder	Select the closed folder to the left of an item to expand and view items contained under it.
Open folder	Select the open folder sign to collapse the menu into the original item.

Banner menu





Section C: Main Menu

Lesson: Hierarchical Menu (Continued)

◀ Jump to TOC

Traversing the tree hierarchy

<ul style="list-style-type: none"> My Banner SCT Banner <ul style="list-style-type: none"> Student [*STUDENT] Advancement [*ALUMNI] <ul style="list-style-type: none"> Advancement Individual [*ALUCONST] Advancement Organization [*ALUORGAN] Membership [*ALUMEMB] Prospect Management [*ALUPROS] <ul style="list-style-type: none"> Prospect Management Entry [*ALUPROENTRY] Prospect Management Query [*ALUPROQUERY] <ul style="list-style-type: none"> Prospect Pool Inquiry [AMAPOOL] Prospect Subject Index List [AMCSUBJ] Strategy Plan List [AMCSTGY] Moves By Prospect [AMAPROS] Moves By Project [AMAPROJ] Moves By Staff [AMASTAF] Prospect Management Validation [*ALUPROVAL] Prospect Management Validation (GTV) [*ALUPROVAL2] Designation [*ALUDESG]

IF	AND	THEN
you click the closed folder to expand	you see more closed folders	it can be expanded further.
you click the closed folder to expand	you see the open folder	it cannot be expanded further.
the menu cannot be expanded further	you see the form that you want	double-click on that form to access it.



Section C: Main Menu

Lesson: Accessing Forms

◀ Jump to TOC

Introduction

The most commonly used ways to access forms are:

- Hierarchical menu
- **Go To...** Field from the Main Menu
- **Go To...** Field accessed by F5 function from a form
- **Options** Menu from within a form
- List of forms accessed during current Banner Session stored in the File Menu
- Direct Access Form (GUAPARM)
- Site Map

Hierarchical menu

Access forms using the Hierarchical Tree Menu.

Procedure

Follow these steps to complete the process.

Step	Action
1	Find the product area that you wish to access.
2	Double-click on the closed folder next to the product to expand the menu.
3	Double-click the form you would like to access or expand an area further by clicking the closed folder.



Section C: Main Menu

Lesson: Accessing Forms (Continued)

◀ Jump to TOC

Banner menu

- 📁 My Banner
- 📁 SCT Banner
 - 📁 Student [*STUDENT]
 - 📁 Advancement [*ALUMNI]
 - 📁 Advancement Individual [*ALUGONST]
 - 📁 Advancement Organization [*ALUORGAN]
 - 📁 Membership [*ALUMEMB]
 - 📁 Prospect Management [*ALUPROS]
 - 📁 Prospect Management Entry [*ALUPROENTRY]
 - 📁 Prospect Management Query [*ALUPROQUERY]
 - 📄 Prospect Pool Inquiry [AMAPOL]
 - 📄 Prospect Subject Index List [AMCSUBJ]
 - 📄 Strategy Plan List [AMCSTGY]
 - 📄 Moves By Prospect [AMAPROS]
 - 📄 Moves By Project [AMAPROJ]
 - 📄 Moves By Staff [AMASTAF]



Section C: Main Menu

Lesson: Accessing Forms (Continued)

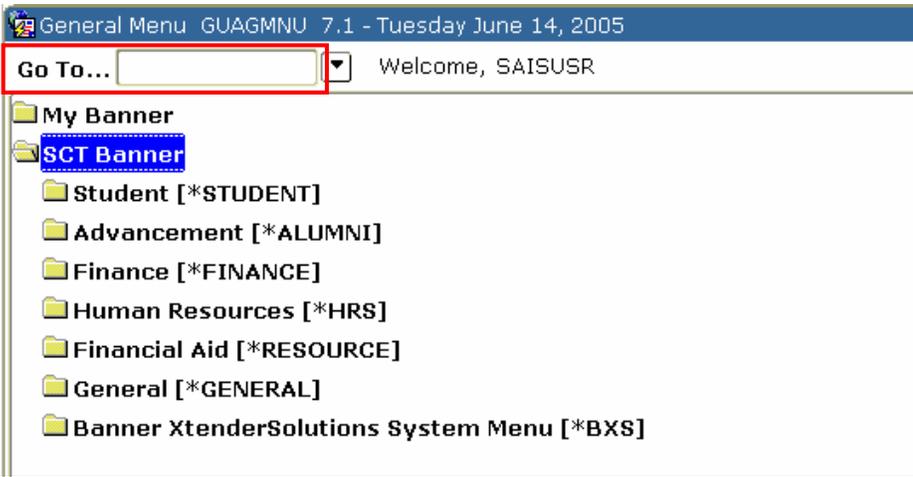
◀ Jump to TOC

Main menu 'Go To...' field

You can access a form from the **Go To...** field above the Main Menu, if you know the seven-character code of the form you wish to access. You may also use the up and down arrow keys in the **Go To...** field to access forms you have previously opened during your current Banner session.

Procedure

Follow these steps to access a form from the Main Menu.

Step	Action
1	<p>Enter the form's seven-character code in the Go To... field.</p> 
2	Press Enter or Tab .



Section C: Main Menu

Lesson: Accessing Forms (Continued)

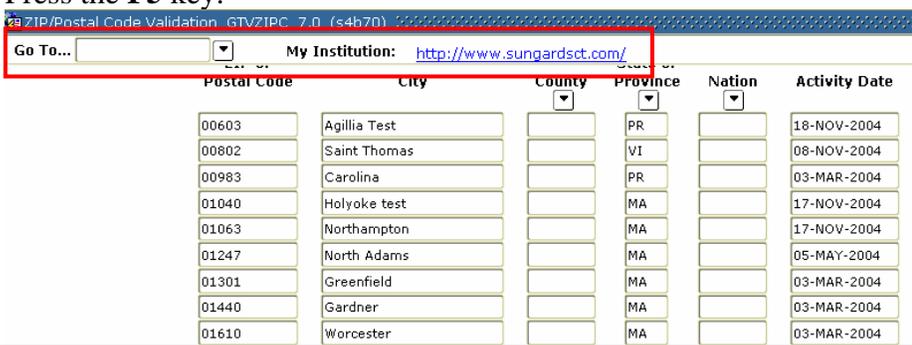
◀ Jump to TOC

‘Go To....’ field called by F5 key

Forms can be accessed via the **Go To...** field called by F5 Key, if you know the seven-character code of the form you wish to access. You may also use the up and down arrow keys in the **Go To...** field to access forms you have previously opened during your current Banner session.

Procedure

Follow these steps to access a form via the F5 key.

Step	Action
1	<p>Press the F5 key.</p> 
2	Enter the forms' seven-character code in the Go To... field.
3	Press Enter or Tab .
4	Press the F5 key again to close out the Go To... window.



Section C: Main Menu

Lesson: Accessing Forms (Continued)

◀ Jump to TOC

Options menu

Forms can also be accessed from the **Options** Menu within a form. When you are in most forms Banner lists related forms in the **Options** Menu. You may access these forms by choosing them from the **Options** menu and when you close out of the chosen form you will be taken back to the original, or 'Calling,' Form.

Screen image

The screenshot shows a software application window with a menu bar (File, Edit, Options, Block, Item, Record, Query, Tools, Window, Help) and a toolbar. The 'Options' menu is open, displaying a list of options: Current Identification, Alternate Identification, Address, Telephone, Biographical, E-mail, Emergency Contact, Appointments and Contacts [SOAAPPT], System Data Summary [GUASYST], and Common Matching [GOAMTCH]. The main form area is divided into sections: 'Person' (with fields for Last Name, First Name, Middle Name, Prefix, Suffix, Preferred First Name, and Full Legal Name), 'Non-Person' (with a Name field), 'ID and Name Source', 'Last Update' (with User, Activity Date, and Origin fields), and 'Original Creation' (with User and Create Date fields). A 'Generate ID' button is visible in the top right of the form area.



Section C: Main Menu

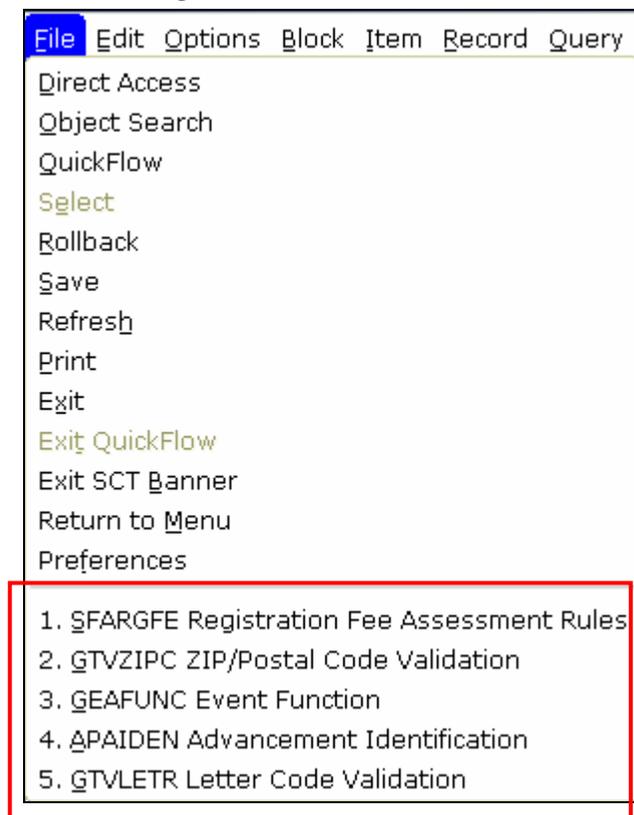
Lesson: Accessing Forms (Continued)

◀ Jump to TOC

List of forms stored in the File menu

Forms can be accessed from the list of forms that are stored in the **File** Menu. Banner retains a list in the **File** menu of the forms you have accessed during your current Banner session. You may quickly access these forms by clicking on the **File** menu and choosing the form from the list. The list is refreshed each time you log out and log back in to Banner.

Screen image





Section C: Main Menu

Lesson: Accessing Forms (Continued)

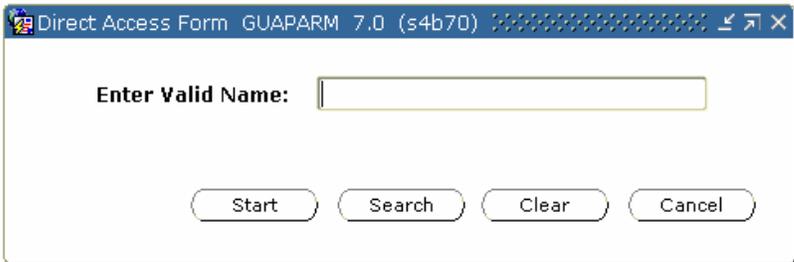
◀ Jump to TOC

Direct access

Use the Direct Access Form (GUAPARM) for quick access if you know a form's seven-character code.

Procedure

Follow these steps to complete the process.

Step	Action
1	While in a form, from the menubar, select File .
2	Select the Direct Access option. That will take you to GUAPARM.  <u>Note:</u> Always open Direct Access from the File menu on the menubar. You will learn more about the seven-character code later on in the module.
3	Enter a valid name of a form.
4	Click the Start button.



Section C: Main Menu

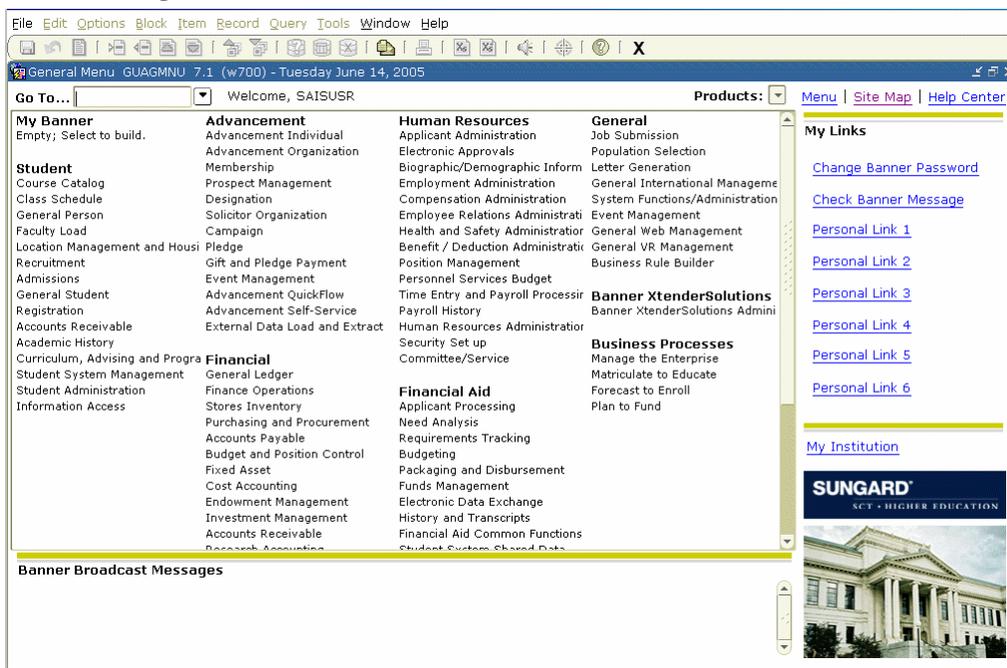
Lesson: Accessing Forms (Continued)

◀ Jump to TOC

Site map

The site map is accessible by selecting the site map link [Site Map](#) from the main menu. It will list top-level menus and one level below them. No fields are listed, just links to various menus and forms.

Screen image



Using the site map

The following chart explains how to utilize the site map.

IF	THEN
you select a product from the site map	the main menu displays the product you selected with one level expanded.
you select a form, process, or QuickFlow	it will be displayed.



Section C: Main Menu

Lesson: QuickFlows

◀ Jump to TOC

Introduction

A quick flow allows you to access a set of form in a specific sequence.

Example: One of your responsibilities includes entering new students into the system. You may define a QuickFlow that accesses all of the forms required for that task so that you do not have to go through each required form from the menu.

Action	Benefit
Allows for access to a set of forms in a specific sequence.	Enables a task to be accomplished both efficiently and completely.
Enables you to customize your job tasks by identifying required forms.	Processing forms occurs in the correct sequence.

Accessing a QuickFlow

There are two ways to access the QuickFlow form.

1. Access the QuickFlow form from the **File** pull-down menu.

QuickFlow Form GUAQFLW 7.0 (s4b70)

QuickFlow: ▼

Description:

Start Clear Cancel

2. Type the code of the QuickFlow in the **Go To...** field on the Main Menu to start the QuickFlow. As you close each form within a QuickFlow, the next form is automatically opened. If you need to exit the QuickFlow before completing all forms within the QuickFlow, you may choose 'Exit QuickFlow' from the **File** Menu.



Section C: Main Menu

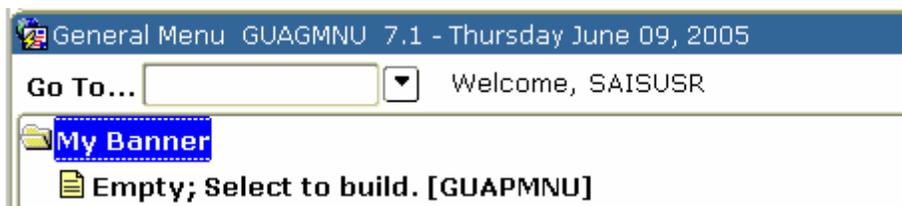
Lesson: My Banner

◀ Jump to TOC

Introduction

My Banner appears at the top of the Main Menu. It allows quick access to forms, jobs, menus, and QuickFlows that are most important in your daily work.

Banner menu



Setting up My Banner

The following forms are used to create, change and copy My Banner.

Form	Code	Purpose
Personal Menu Maintenance	GUAPMNU	Create and change your personal menu.
Personal Menu Maintenance Menu and Copy	GUTPMNU	Copy your personal menu to or from another user.



Section C: Main Menu

Lesson: Self Check

◀ Jump to TOC

Directions

Answer the following questions. Try to do this without using your workbook notes.

Question 1

Which of the following allows you to access various Banner products directly?

- a) Tool bar
- b) Menu bar
- c) Auto/Hint Status Line
- d) Product Links

Question 2

The Banner Main Menu allows you to

- a) customize Banner Forms.
- b) access the contents of Banner.
- c) enter information on an Banner Form.

Question 3

The only way to access a form is to use the Hierarchical Tree Menu Structure.

True or False

Question 4

Fine-Grained Access is security that allows you to see all forms on a menu.

True or False

Question 5

If you know the seven-character code of a form, you can access it using Direct Access.

True or False



Section C: Main Menu

Lesson: Self Check (Continued)

◀ Jump to TOC

Question 6

What is the purpose of a QuickFlow?

- a) Enables you to move around the menu quickly.
- b) Enables you to customize your job tasks.
- c) Enables you to remove any menu items that are not used.

Question 7

What function would you access if you know a form's seven-character code?

- a) Form Access
- b) F5 or Direct Access
- c) InstaField
- d) Direct Link

Question 8

My Banner can only include QuickFlows that are important in your daily work.

True or False



Section C: Main Menu

Lesson: Answer Key

◀ Jump to TOC

Question 1

Which of the following allows you to access various Banner products directly?

- a) Tool bar
- b) Menu bar
- c) Auto/Hint Status Line
- d) **Product Links**

Question 2

The Banner Main Menu allows you to

- a) customize Banner Forms.
- b) **access the contents of Banner.**
- c) enter information on an Banner Form.

Question 3

The only way to access a form is to use the Hierarchical Tree Menu Structure.

False. Forms can be access other ways such as using F5 or the Go To... field.

Question 4

Fine-Grained Access is security that allows you to see all forms on a menu.

False. Fine-Grained Access only allows you to see the forms that you have access to.

Question 5

If you know the seven-character code of a form, you can access it using Direct Access.

True.

Question 6

What is the purpose of a QuickFlow?

- a) Enables you to move around the menu quickly.
- b) **Enables you to customize your job tasks.**
- c) Enables you to remove any menu items that are not used.



Section C: Main Menu

Lesson: Answer Key (Continued)

◀ [Jump to TOC](#)

Question 7

What function would you access if you know its seven-character code?

- a) Form Access
- b) F5 or Direct Access**
- c) InstaField
- d) Direct Link

Question 8

My Banner can only include QuickFlows that are important in your daily work.

False. My Banner can include forms, jobs, menus, and QuickFlows that are important in your daily work.



Section D: Menu Bars

Lesson: Overview

◀ [Jump to TOC](#)

Introduction

The purpose of this section is to familiarize users with the various Menu Bars that exist within Banner.

Objectives

After completing this section, you will be able to

- describe the Banner menu bar
- utilize the functions in the Banner menu bar.

Section contents

Menu Bar Overview	62
Pull Down Menus	63
Self Check	78
Answer Key	79



Section D: Menu Bars

Lesson: Menu Bar Overview

◀ Jump to TOC

Introduction

The menu bar is located at the top of the main menu on all forms. It offers a variety of options for navigating within Banner. The menu bar is accessible anytime except when a dialog box, alert box, or list of values (LOV) is displayed on the screen.

Banner form

The screenshot shows the Banner SPAIDEN 7.0 interface. At the top is a menu bar with options: File, Edit, Options, Block, Item, Record, Query, Tools, Window, Help. Below the menu bar is a toolbar with various icons. The main window title is "General Person Identification SPAIDEN 7.0 (s4b70)". The form content includes a "Confidential" label, an ID field with the value "510000001", a name field with "Allen, Matthew A.", and a "Generate ID" button. Below this are tabs for "Current Identification", "Alternate Identification", "Address", "Telephone", "Biographical", "E-mail", and "Emergency Contact". The "Current Identification" tab is active, showing fields for "ID" (510000001) and "Name Type". The form is divided into two main sections: "Person" and "Non-Person". The "Person" section includes fields for "Last Name" (Allen), "First Name" (Matthew), "Middle Name" (A.), "Prefix" (Mr), "Suffix" (PHD.), "Preferred First Name", and "Full Legal Name". The "Non-Person" section has a "Name" field. To the right of these sections are two panels: "ID and Name Source" and "Last Update". The "ID and Name Source" panel includes fields for "User" (SGEISER), "Activity Date" (28-OCT-2004), and "Origin" (APAIDEN). The "Last Update" panel includes fields for "User" and "Create Date".

Menu bar components

The menu bar consists of several pull-down menus.

File Edit Options Block Item Record Query Tools Window Help



Section D: Menu Bars

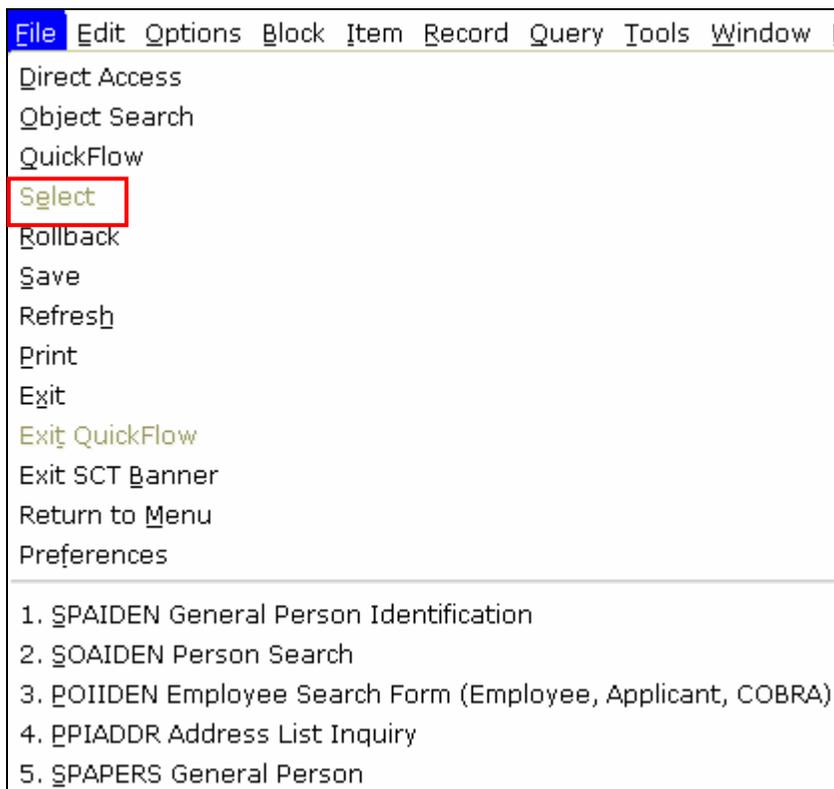
Lesson: Pull Down Menus

◀ Jump to TOC

Introduction

There are 9 pull-down menus on the menu bar, each with a variety of selections. A dimmed option on a pull down menu means that is disabled.

Banner menu





Section D: Menu Bars

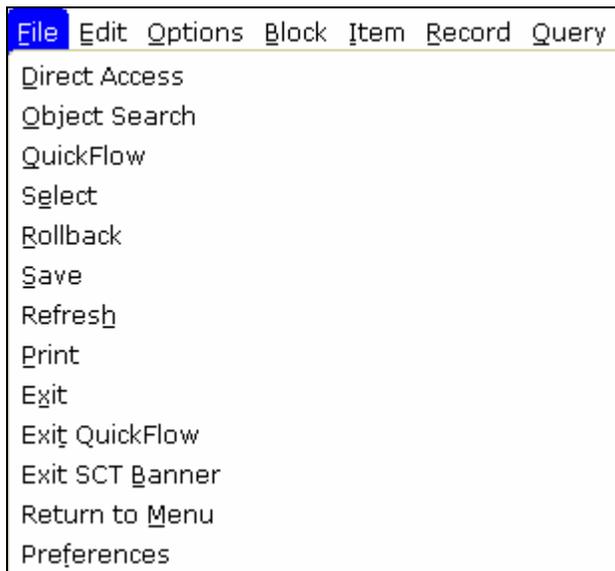
Lesson: Pull Down Menus (Continued)

◀ Jump to TOC

The File menu

The **File** menu contains standard Banner and Oracle functions.

Banner menu





Section D: Menu Bars

Lesson: Pull Down Menus (Continued)

◀ Jump to TOC

Menu options

The following chart details each menu option and its purpose.

Option	Toolbar Icon	Keyboard Shortcut	Purpose								
Direct Access		F5	Accesses the Direct Access Form (GUAPARM).								
Object Search			Accesses the Object Search Form (GUIOBS) to locate a form, job, or QuickFlow if you know part of its name, description, or type.								
QuickFlow			Displays the QuickFlow Form (GUAQFLW), which is used to access a QuickFlow.								
Select			Returns you to the calling form and enters the selected value into the field that called the form.								
Rollback		Shift-F7	Action depends on what type of form is currently used.								
			<table border="1"> <thead> <tr> <th>Form</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Application and Inquiry</td> <td>Clears all information (except Key information) and returns you to the first enterable field in the Key Block.</td> </tr> <tr> <td>Validation</td> <td>Returns you to the first enterable field on the form.</td> </tr> <tr> <td>Query</td> <td>Returns you to the first enterable field on the calling form.</td> </tr> </tbody> </table>	Form	Action	Application and Inquiry	Clears all information (except Key information) and returns you to the first enterable field in the Key Block.	Validation	Returns you to the first enterable field on the form.	Query	Returns you to the first enterable field on the calling form.
Form	Action										
Application and Inquiry	Clears all information (except Key information) and returns you to the first enterable field in the Key Block.										
Validation	Returns you to the first enterable field on the form.										
Query	Returns you to the first enterable field on the calling form.										
Save		F10	Saves all changes entered since the last time you saved.								
Refresh			Clears the message line; redraws the screen.								



Section D: Menu Bars

Lesson: Pull Down Menus (Continued)

◀ Jump to TOC

Menu options, continued

Option	Toolbar Icon	Keyboard Shortcut	Purpose								
Print			Prints the current window; inputs the date and time in the title bar.								
Exit	X		Actions vary.								
			<table border="1"> <thead> <tr> <th>If selected from...</th> <th>Then you...</th> </tr> </thead> <tbody> <tr> <td>a form</td> <td>exit that form.</td> </tr> <tr> <td>the main menu</td> <td>exit from Banner.</td> </tr> <tr> <td>query mode</td> <td>cancel the query.</td> </tr> </tbody> </table>	If selected from...	Then you...	a form	exit that form.	the main menu	exit from Banner.	query mode	cancel the query.
If selected from...	Then you...										
a form	exit that form.										
the main menu	exit from Banner.										
query mode	cancel the query.										
Exit QuickFlow			Exits you from QuickFlow.								
Preferences			Displays the Personal Preferences Maintenance Form (GUAUPRF), which is used to customize Banner for individual users.								
Banner Xtender Solutions			Allows you to open Banner XtenderSolutions based on the context of the current form and shifts to the XtenderSolutions Application. <u>Note:</u> You must be a valid Banner XtenderSolutions user and have the Legato® product installed.								
Banner Xtender Solutions-Info			Retrieves desired information from Banner XtenderSolutions and returns it to Banner in “silent” mode without leaving. <u>Note:</u> You must be a valid Banner XtenderSolutions user and have the Legato® product installed.								
1. RRAAREQ Applicant Requirements			Displays the last 10 forms a user has accessed during the current Banner Session.								



Section D: Menu Bars

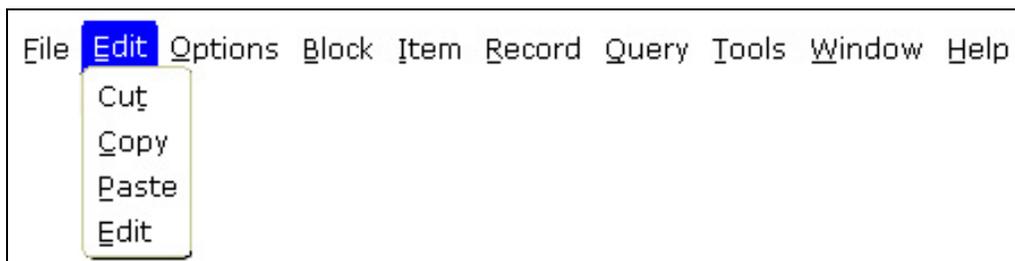
Lesson: Pull Down Menus (Continued)

◀ Jump to TOC

The Edit menu

The **Edit** menu contains functions used to edit text items.

Banner menu



Menu options

The following table details each menu option and its purpose.

Option	Toolbar Icon	Keyboard Shortcut	Purpose
Cut		Ctrl-X	Cuts selected text and places it on the clipboard.
Copy		Ctrl-C	Copies selected text and places it on the clipboard.
Paste		Ctrl-V	Pastes text from the clipboard to the cursor location.
Edit			Displays the editor window, which is used to enter and update text.



Section D: Menu Bars

Lesson: Pull Down Menus (Continued)

◀ Jump to TOC

The Options menu

The **Options** menu varies from form to form. Some take you to other blocks and windows within the current form, other options take you outside the current form. The **Options** menu as well as valid **File** menu options may be accessed at any time by right clicking on a blank section of any form.

General Person Identification SPAIDEN 7.0 (s4b70) QuickFlow: ADM: 1 of 6
Confidential
ID: 51000001 Allen, Matthew A. Generate ID:

Current Identification Alternate Identification Address Telephone Biographical E-mail Emergency Contact

ID: Name Type:

Person

Last Name:
First Name:
Middle Name:
Prefix:
Suffix:
Preferred First Name:
Full Legal Name:

Non-Person

Name:

User:
Create Date:

Source

Rollback
Save
Exit
Print
Add to Personal Menu
Current Identification
Alternate Identification
Address
Telephone
Biographical
E-mail
Emergency Contact
Appointments and Contacts [SOAAPPT]
System Data Summary [GUASYST]
Common Matching [GOAMTCH]

Banner menu

File Edit **Options** Block Item Record Query Tools Window Help

Current Identification
Alternate Identification
Address
Telephone
Biographical
E-mail
Emergency Contact
System Data Summary [GUASYST]



Section D: Menu Bars

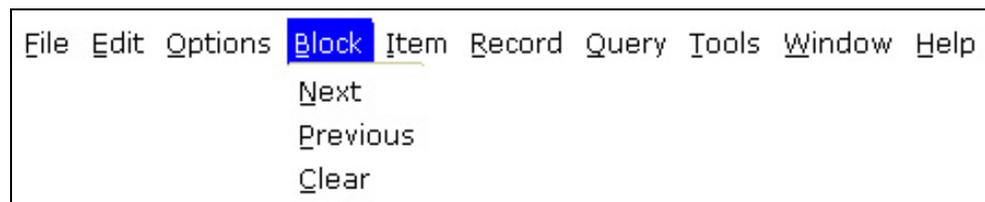
Lesson: Pull Down Menus (Continued)

◀ Jump to TOC

The Block menu

The **Block** menu enables you to move from one block area to another within a form.

Banner menu



Menu options

The following chart details each menu option and its purpose.

Option	Toolbar Icon	Keyboard Shortcut	Purpose
Previous		Ctrl-Page Up	Moves cursor to the previous block that has at least one enterable field.
Next		Ctrl-Page Down	Moves cursor to the next block that has at least one enterable field.
Clear		F7	Clears all information in the current block. Also known as Enter Query. Puts the form in Query Mode.



Section D: Menu Bars

Lesson: Pull Down Menus (Continued)

◀ Jump to TOC

The Item menu

The **Item** menu enables you to move from one field to another and clear and duplicate data within a form.

Note: “Item” is the Banner term that is used to refer to a field.

Banner menu



Menu options

The following chart details each menu option and its purpose.

Option	Toolbar Icon	Keyboard Shortcut	Purpose
Previous		Shift-Tab	Moves the cursor to the previous enterable field.
Next		Tab	Moves the cursor to the next enterable field.
Clear			Clears all information from the current field on your display. Does not remove information from any records or tables.
Duplicate			Duplicates the contents of the same field in the previous record and copies it into the new record. Used in blank row of a repeating record.

The Record menu

The **Record** menu allows you to work with records within a form.



Section D: Menu Bars

Lesson: Pull Down Menus (Continued)

◀ Jump to TOC

Banner menu

File Edit Options Block Item **Record** Query Tools Window Help

Previous
Next
Scroll Up
Scroll Down
Clear
Remove
Insert
Duplicate
Lock



Section D: Menu Bars

Lesson: Pull Down Menus (Continued)

◀ Jump to TOC

Menu options

The following chart details each menu option and its purpose.

Option	Toolbar Icon	Keyboard Shortcut	Purpose
Previous		Up Arrow	Moves cursor to the first enterable field in the previous record.
Next		Down Arrow	Moves cursor to the first enterable field in the next record of the current block. If the cursor is in the last record, a new record is created.
Scroll Up		Page Up	Scrolls up the list of repeating records, putting the first displayed record at the bottom of the list.
Scroll Down		Page Down	Scrolls down the list of repeating records, putting the last displayed record at the top of the list.
Clear			Clears all information from the display of the current record.
Remove			Removes all information for the current record. When you Save, the record is permanently deleted.
Insert			Inserts a new blank record in the existing records.
Duplicate			Duplicates the content of all fields in a record and copies them into a new record.
Lock			Temporarily locks the contents of the record so no other Banner user can update it. <u>Tip</u> : Save, Rollback, then Exit release the lock.



Section D: Menu Bars

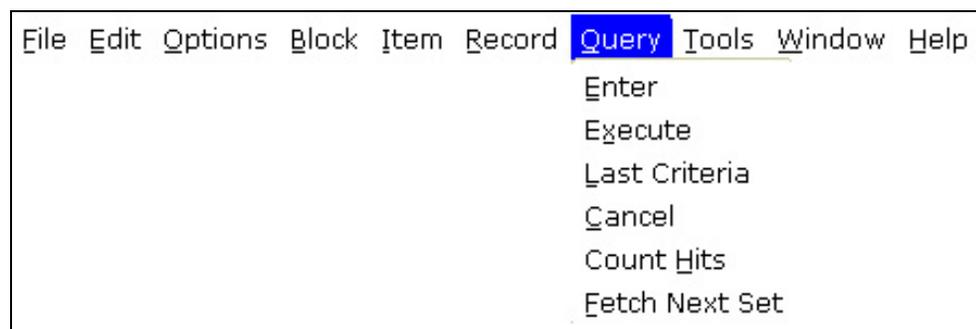
Lesson: Pull Down Menus (Continued)

◀ Jump to TOC

The Query menu

The **Query** menu contains the functions used to search for information in the database based on specific criteria.

Banner menu



Menu options

The following chart details each menu option and its purpose.

Option	Toolbar Icon	Keyboard Shortcut	Purpose
Enter		F7	Puts the form into Query mode so you can enter search criteria to see information already in the database.
Execute		F8	Searches the database and displays records that match your search criteria.
Last Criteria		F7 twice	Enters the criteria from your last search (enabled only when you are in Query mode).
Cancel		Ctrl-Q	Cancels the Query and takes the form out of Query mode.
Count Hits			Counts the number of records that match the search criteria and displays that number on the Auto Hint line.
Fetch Next Set			If more records meet the search criteria that fit in the window, clicking this option replaces the current set of displayed records with the next set.



Section D: Menu Bars

Lesson: Pull Down Menus (Continued)

◀ Jump to TOC

The Tools menu

The **Tools** menu allows you access to Banner Xtender Solutions and SCT Workflows.

Banner menu

File Edit Options Block Item Record Query **Tools** Window Help

- SCT Banner XtenderSolutions ▶
- SCT Workflow ▶

The window menu

The window menu allows you to arrange the display of the open windows in a form.

Banner menu

File Edit Options Block Item Record Query Tools **Window** Help

- Cascade
- Tile Horizontally
- Tile Vertically

● 1 General Person Identification SPAIDEN 7.0 (s4b70)

Menu options

The following chart details each menu option and its purpose.

Option	Purpose
Cascade	Arranges each open window in a cascade.
Tile Horizontally	Arranges each open window in a tiled horizontal format.
Tile Vertically	Arranges each open window in a tiled vertical format.
Open Windows	Lists each currently open window in the active form. A bullet identifies the active window.



Section D: Menu Bars

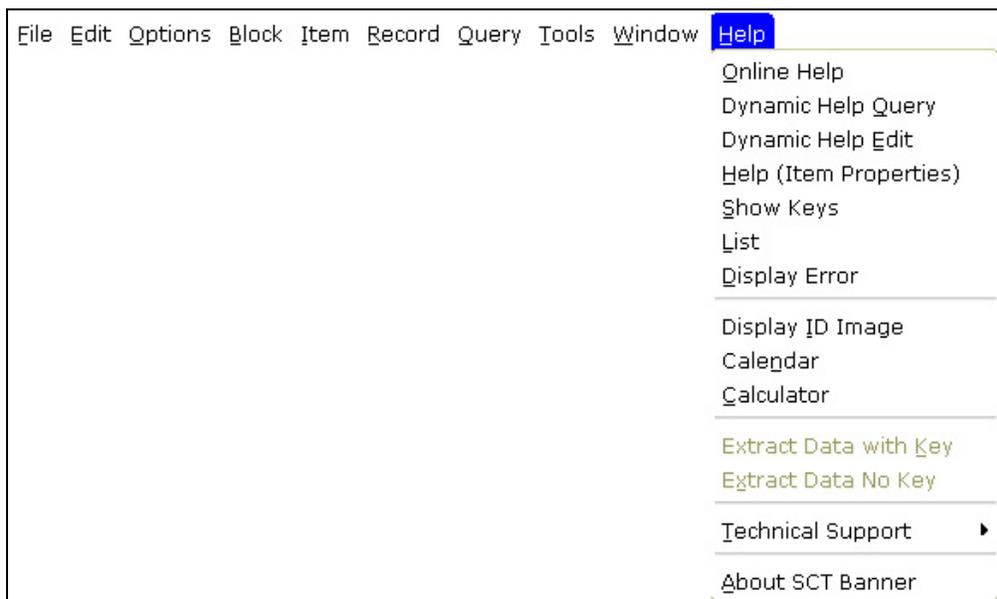
Lesson: Pull Down Menus (Continued)

◀ Jump to TOC

The Help menu

The **Help** menu contains various help tools, the image displayer, a calculator and a calendar.

Banner menu





Section D: Menu Bars

Lesson: Pull Down Menus (Continued)

◀ Jump to TOC

Menu options

The following chart details each menu option and its purpose.

Option	Toolbar Icon	Keyboard Shortcut	Purpose
Online Help		Ctrl-H	Displays online information for Banner forms, windows, blocks and fields. This option may be disabled if Online Help is not available for the form.
Dynamic Help Query			Displays the Dynamic Help Form (GUAHELP) in Query mode, which is used to display traditional help for a field, block, or form.
Dynamic Help Edit			Displays the Dynamic Help Query Form (GUAHELP) in Edit mode, which is used to edit traditional help for a field, block, or form.
Banner Bookshelf			Provides electronic access to hardcopy Banner documents. These documents are in PDF format; use Adobe Acrobat to view them.
Help (Item Properties)			Displays the Oracle item properties window for the current field. The window lists properties such as internal database name, type of data, maximum length, etc.
Show Keys		Ctrl+F1	Displays the list of functions and their equivalent keystrokes available in your environment for the current form, window, or field.
List		F9	Displays the List of Values (LOV) for the current field if List of Values appears in the Status line.



Section D: Menu Bars

Lesson: Pull Down Menus (Continued)

◀ Jump to TOC

Menu options, continued

Option	Toolbar Icon	Keyboard Shortcut	Purpose
Display Error		Shft+F1	Displays the code that is in error, if an Oracle error occurs.
Display ID Image			Displays the image associated with the ID, if available, when the cursor is in an ID field.
Calendar			Displays the calendar.
Calculator			Displays the calculator.
Extract Data Key			Extracts Banner data (for the current block), along with Key data, for use in a spreadsheet. This is available only from certain forms.
Extract No Data Key			Extracts Banner data (for the current block), without Key data, for use in a spreadsheet. This is available only from certain forms.
Technical Support			<p>Three options are accessible from this selection.</p> <ol style="list-style-type: none"> 1. Turn SQL trace on: If you are having problems with Banner, you will contact your IT department. They will tell you to access the Help menu and select the <u>Turn SQL trace on</u> option. You will walk through the steps where you are having difficulty. Banner automatically records your steps in a log file. IT can then access that file and help solve your problem. 2. Turn SQL trace off: When you are finished recording your steps, you turn the SQL trace off with this option. 3. Reconnect to database: Utilized when you make changes in Banner like changing your password. Instead of going through the process of logging out of Banner for the password change to take effect and logging back in, you can simply select this option to make your re-connect process go quicker.
About Banner			Displays the About Banner Form (GUAABOT), which identifies the current form, release number, date and time.



Section D: Menu Bars

Lesson: Self Check

◀ Jump to TOC

Directions

Answer the following questions. Try to do this without using your workbook notes.

Question 1

Toolbars contain menus that list the various options you can perform in Banner.

True or False

Question 2

Dimmed items in the menu bar mean that they are not accessible in that part of Banner.

True or False

Question 3

Text items such as descriptions can be edited when using the options found in the Edit menu.

True or False

Question 4

If you want to clear a record, which menu bar choice would you select?

- a) File
- b) Edit
- c) Record
- d) Help

Question 5

While viewing an LOV, access the menu bar to escape.

True or False



Section D: Menu Bars

Lesson: Answer Key

◀ Jump to TOC

Question 1

Toolbars contain menus that list the various options you can perform in Banner.

False. The menu bar contains the lists with options.

Question 2

Dimmed items in the menu bar mean that they are not accessible in that part of Banner.

True.

Question 3

Text items such as descriptions can be edited when using the options found in the Edit menu.

True.

Question 4

If you want to clear a record, which menu bar choice would you select?

- a) File
- b) Edit
- c) **Record**
- d) Help

Question 5

While viewing an LOV, access the menu bar to escape.

False. You cannot access the menu bar while viewing an LOV or when a dialog box is displayed.



Section E: Toolbar

Lesson: Overview

◀ [Jump to TOC](#)

Introduction

The purpose of this section is to familiarize users with the Banner toolbar.

Objectives

After completing this section, you will be able to

- describe the Banner toolbar
- utilize the icons in the toolbar.

Section contents

Toolbar Overview.....	81
Default Icons	82
Self Check	83
Answer Key.....	84



Section E: Toolbar

Lesson: Toolbar Overview

◀ Jump to TOC

Introduction

A toolbar is a set of icons that represent shortcuts for performing common functions.

Screen image

The screenshot shows a software application window with a menu bar (File, Edit, Options, Block, Item, Record, Query, Tools, Window, Help) and a toolbar. The toolbar contains various icons, with the exit icon (a square with an 'X') highlighted by a red box. Below the toolbar is a data entry form for a person's identification. The form has tabs for 'Current Identification', 'Alternate Identification', 'Address', 'Telephone', 'Biographical', 'E-mail', and 'Emergency Contact'. The 'Current Identification' tab is active, showing fields for ID (510000001), Name Type, Last Name (Allen), First Name (Matthew), Middle Name (A.), Prefix (Mr.), Suffix (PHD.), Preferred First Name, Full Legal Name, ID and Name Source, Last Update (User: SGEISER, Activity Date: 28-OCT-2004, Origin: APAIDEN), and Original Creation (User, Create Date). The status bar at the bottom indicates 'Current identification number, overwrite to change.' and 'Record: 1/1'.

Bubble Help

If you move your cursor over an icon, a box appears that describes the function of the icon; this is Bubble Help. It may be turned off at any time.

Example: If you place your cursor over the exit icon, you will see the following:



Note: To turn the description box for the icons on, access the General User Preferences Maintenance Form (GUAUPRF). Under Toolbar Display Options, make sure that the Display Bubble Help option is checked.



Section E: Toolbar

Lesson: Default Icons

◀ Jump to TOC

Toolbar customization

The set-up of icons in your toolbar can vary.

- Individual users may customize toolbars.
- Your institution can make toolbar changes that apply to all users.



Commonly used icons

Icon	Function
	Save
	Rollback
	Select
	Insert Record
	Previous Record
	Next Record
	Previous Block
	Next Block
	Print
X	Exit



Section E: Toolbar

Lesson: Self Check

◀ Jump to TOC

Directions

Answer the following questions. Try to do this without using your workbook notes.

Question 1

The toolbar is a set of icons that represent shortcuts for performing common functions.

True or False

Question 2

Your institution can make toolbar changes that apply to all users.

True or False

Question 3

What does the  icon do?

- a) It saves the data that you entered into Banner.
- b) It bookmarks your location so you can return to the same form at a later time.
- c) It bookmarks a Web page.
- d) It saves the current form into your personal files.



Section E: Toolbar

Lesson: Answer Key

◀ Jump to TOC

Question 1

The toolbar is a set of icons that represent shortcuts for performing common functions.

True.

Question 2

Your institution can make toolbar changes that apply to all users.

True.

Question 3

What does the  icon do?

- a) **It saves the data that you entered into Banner.**
- b) It bookmarks your location so you can return to the same form at a later time.
- c) It bookmarks a Web page.
- d) It saves the current form into your personal files.



Section F: Help Features

Lesson: Overview

◀ Jump to TOC

Introduction

The purpose of this section is to familiarize the users with the different help features available in Banner.

Objectives

After completing this section, you will be able to describe and access the following types of Help in Banner.

- Online Help
- Dynamic Help
- Banner Bookshelf
- Show Keys
- Help (Item Properties)

Section contents

Overview	85
Online Help	86
Dynamic Help.....	91
Banner Bookshelf	92
Help (Item Properties).....	95
Auto Hint/Status Line.....	97
Self Check	98
Answer Key	100



Section F: Help Features

Lesson: Online Help

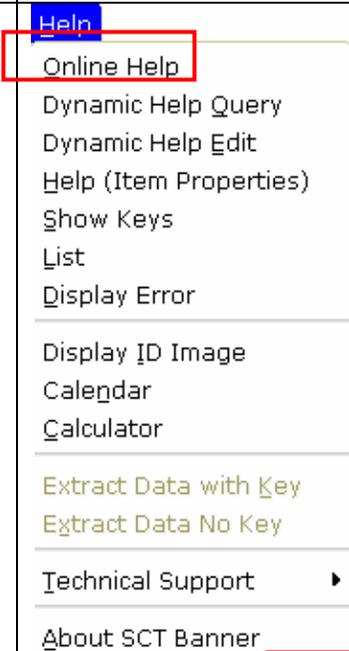
◀ Jump to TOC

Introduction

The Online Help system contains information about forms and fields, as well as tasks you can perform with Banner. This help system runs in a web browser.

Accessing Online Help

There are three ways to access Online Help, by choosing the **Online Help** button on the toolbar or the Online Help option from the **Help** pull-down menu. Additionally, you can access online help by selecting the **Help Center** link on the main menu.

Area in Banner	Graphic
Toolbar	
Menubar	 <ul style="list-style-type: none">HelpOnline HelpDynamic Help QueryDynamic Help EditHelp (Item Properties)Show KeysListDisplay ErrorDisplay ID ImageCalendarCalculatorExtract Data with KeyExtract Data No KeyTechnical SupportAbout SCT Banner
Help Center	Menu Site Map Help Center



Section F: Help Features

Lesson: Online Help (Continued)

◀ Jump to TOC

Help Center main screen

SUNGARD
SCT • HIGHER EDUCATION

UNIFIED DIGITAL CAMPUS

SCT Banner Help Center

- [Accounts Receivable](#)
- General
- Advancement
- [Human Resources](#)
- Student
- [Finance](#)
- [Financial Aid](#)
- [BXS](#)

© SunGard 2004. All rights reserved. The unauthorized possession, use, reproduction, distribution, display or disclosure of this material or the information contained herein is prohibited.

Browsing for topics

The Contents tab and the bread crumb trail both enable you to browse for topics categorically. Form and field information is organized by Banner module. Task information is contained under the *Procedures* heading.



Section F: Help Features

Lesson: Online Help (Continued)

◀ Jump to TOC

Screen image

The screenshot shows the SunGard SCT Banner Help Center interface. At the top, there are navigation tabs: Contents, Index, Search, SCT, Banner, and Help Center. The 'Contents' tab is selected. On the left, there is a tree view of the help center structure, with 'General' expanded to show 'Procedures'. The main content area displays the article 'Copying a Population Selection'. A red box highlights the breadcrumb trail: 'You are here: General > Procedures > Population Selection Procedures > Copying a Population Selection'. The article title is 'Copying a Population Selection'. Below the title, there is a brief introduction and a list of 8 numbered steps for copying a population selection. A note indicates that the Creator ID defaults to the user ID and cannot be changed. The article concludes with a final step to use the normal steps to change and save rules for the new population selection.

Browse by clicking on the **Contents** tab and by using the bread crumb trail.



Section F: Help Features

Lesson: Online Help (Continued)

◀ Jump to TOC

Searching for topics

The Search tab allows you to search for topics within the help system. You can also use your browser's "search on page" feature to find specific text on a help page.

Screen image

Contents Index Search SCT Banner Help Center SunGard SCT

Type in the word(s) to search for:
gtvzipc

You are here: [General](#) > [System Functions Forms](#) > [Forms](#) > [ZIP/Postal Code Validation Form \(GTVZIPC\)](#)

ZIP/Postal Code Validation Form (GTVZIPC)

Use this form to identify the ZIP codes and postal codes used throughout Banner. You can assign ZIP/postal codes to:

- Sites on the Site Code Validation Form (STVSITE).
- Buildings on the Building Definition Form (SLABLDG).
- Recruits on the Quick Recruit Form (SRAQUIK).
- Donors on the Gift Form (AGAGIFT).

Defining ZIP/postal codes on this form can help you enter addresses in Banner more accurately. If you are on application form and select a ZIP/postal code from a List of Values, address data from GTVZIPC automatically appears in the associated fields on the form.

Using the index

The Index tab provides an alphabetical listing of topics within the help system. When you enter the letters of a term, the index will scroll through the topics to the closest alphabetical match.

Screen image

Contents Index Search SCT Banner Help Center SunGard SCT

Type in the keyword to find:
Function Sta

You are here: [General](#) > [Validation Forms](#) > [Forms](#) > [Function Status Code Validation Form \(GTVFSTA\)](#)

Function Status Code Validation Form (GTVFSTA)

Use this form to define codes that describe the status of functions. Examples of a function status include active, postponed, and cancelled.

Function status codes must be assigned to functions on the Event Function Form (GEAFUNC).

If you create a function on the Event Form (SLAEVNT), the system automatically assigns the status code A(active) to the function. You can override this status on GEAFUNC.

The Active check box is not currently used by any Banner processing. Select the check box for status codes that indicate the function is active. Clear the check box for status codes that indicate the function is no longer active.

Using the field index

Many form descriptions are quite long, so sometimes you will find a link that goes to field descriptions on a separate page.



Section F: Help Features

Lesson: Online Help (Continued)

◀ Jump to TOC

Screen image

Type in the keyword to find:
gxvdird

GXVDIRD Bank Routing Number Validation Help Form (GUAHELP)
Individual Function Inquiry Form (GEIIDF)
Installation Control Form (GUAINST)
Instructional Method Validation Form (GTV
International Management
overview
validation forms reference
job parameter set
Job Parameter Set Rule Form (GJRJPRM)
Job Submission

You are here: [General](#) > [Validation Forms](#) > [Forms](#) > Bank Routing Number Validation Form (GXVDIRD)

Bank Routing Number Validation Form (GXVDIRD)

Use this form to define bank routing information. This information is required if you make payments by direct deposit. The Direct Deposit Recipient Form (GXADIRD) requires this bank routing information to identify the recipient's bank that receives the payments via direct deposit.

Bank Routing Number	Routing number for the recipient's bank. This number is required to send funds to the recipient's bank via direct deposit.
Bank Name	Name of the bank associated with the routing number.
Activity Date	Date the bank routing record was created or last updated.

Back	
Bank Routing Number	Routing number for the recipient's bank. This number is required to send funds to the recipient's bank via direct deposit.
Bank Name	Name of the bank associated with the routing number.
Activity Date	Date the bank routing record was created or last updated.



Section F: Help Features

Lesson: Dynamic Help

◀ Jump to TOC

Introduction

Dynamic Help is the traditional help for forms, blocks and fields. Institution specific help will be contained in the Local Dynamic Help.

Accessing Dynamic Help

Dynamic Help is displayed on the Help Form (GUAHELP). It allows you to identify the help text you want to access.

Note: You can access GUAHELP in Query mode or in Edit mode.

Screen image

Help Form GUAHELP 7.0 (s4b70)

Form

Block

Field

SCT Banner Local Help Exists?

Edit Clear Cancel

Dynamic Help types

The following chart details the different types of dynamic help.

Type	Description
Banner Dynamic Help	<ul style="list-style-type: none">• Provided by SCT.• Updated with each system.• Can change help text, but each upgrade overwrites your changes.
Local Dynamic help	<ul style="list-style-type: none">• Written and maintained by your institution.• Not affected by system upgrades



Section F: Help Features

Lesson: Banner Bookshelf

◀ Jump to TOC

Introduction

Banner Bookshelf is a tool for reading, searching and printing Banner documentation. It accesses the following system documentation in PDF format:

- User Manuals
- Release Guides
- Upgrade Guides
- Implementation Guides
- Technical Reference Manual (TFM)
- Object: Access Reporting Data Models

Note: PDF means portable document format. These files can be printed but not altered.

Accessing Banner Bookshelf

Banner Bookshelf must be downloaded from the ActionWeb by your site administrator and installed locally.

It can be accessed from a user's desktop by creating a shortcut. Further instructions can be found in the *Banner General Release Guide* and the *Banner Documentation Bookshelf Getting Started Guide*.



Section F: Help Features

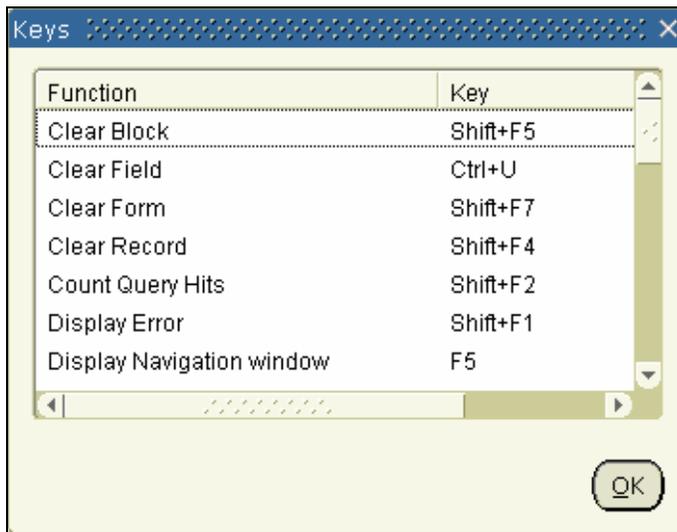
Lesson: Banner Bookshelf (Continued)

◀ Jump to TOC

Introduction

Show Keys provides a list of functions and associated keystrokes for the current field or form.

Screen image





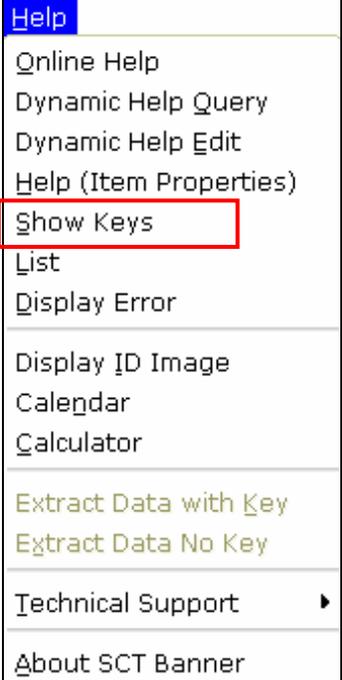
Section F: Help Features

Lesson: Banner Bookshelf (Continued)

◀ Jump to TOC

Accessing Show Keys

Access Show Keys from one of the following areas.

Area in Banner	Graphic / Keystroke
Keyboard	Ctrl+F1
Menubar	 <p>The screenshot shows a 'Help' menu with the following items: 'Help' (highlighted in blue), 'Online Help', 'Dynamic Help Query', 'Dynamic Help Edit', 'Help (Item Properties)', 'Show Keys' (highlighted with a red box), 'List', 'Display Error', 'Display ID Image', 'Calendar', 'Calculator', 'Extract Data with Key', 'Extract Data No Key', 'Technical Support' (with a right-pointing arrow), and 'About SCT Banner'.</p>



Section F: Help Features

Lesson: Help (Item Properties)

◀ Jump to TOC

Introduction

Help (Item Properties) provides a list of all properties in the current field.

Banner form

Attributes	Values
Name	ID
X coordinate	42.000
Y coordinate	17.000
Width	57.000
Height	17.000
Displayed	TRUE
Automatic Hint	TRUE
Base Table	FALSE
Primary Key	FALSE
Updateable	TRUE
Queryable	TRUE
Required	FALSE
Update if NULL	FALSE
Enabled	TRUE
Insert Allowed	TRUE

OK



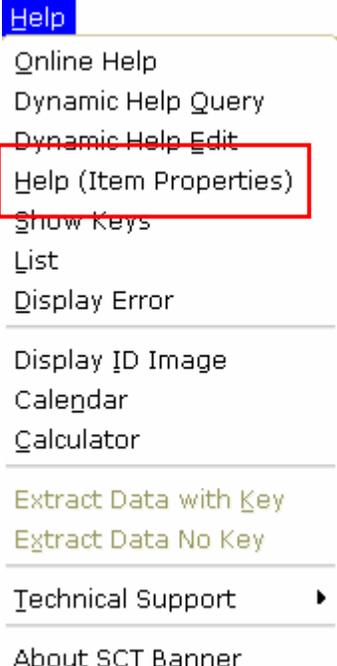
Section F: Help Features

Lesson: Help (Item Properties) (Continued)

◀ Jump to TOC

Accessing Item Properties

Access Help (Item Properties) from the following area.

Area in Banner	Graphic
Menubar	 <p>The graphic shows a vertical menu bar with the following items: 'Help' (highlighted in blue), 'Online Help', 'Dynamic Help Query', 'Dynamic Help Edit', 'Help (Item Properties)' (highlighted in a red box), 'Show Keys', 'List', 'Display Error', 'Display ID Image', 'Calendar', 'Calculator', 'Extract Data with Key', 'Extract Data No Key', 'Technical Support' (with a right-pointing arrow), and 'About SCT Banner'.</p>



Section F: Help Features

Lesson: Auto Hint/Status Line

◀ Jump to TOC

Introduction

The Auto Hint/Status Line appears at the bottom of the screen. It describes the place where the cursor is located. Error messages, processing messages, and keyboard equivalents appear here.

Screen image

The screenshot shows a web application interface with a menu on the left and a status line at the bottom. The menu is titled "My Banner" and includes sub-menus for "SCT Banner", "Student [*STUDENT]", "Advancement [*ALUMNI]", "Finance [*FINANCE]", "Human Resources [*HRS]", and "Applicant Administration [*HRSAAPPLCNT]". The "Applicant Administration" sub-menu is expanded, showing options like "Biographic/Demographic Information [*HRSPERSON]", "Identification [PPAIDEN]", "Employee Search Form (Employee, Applicant, COBRA) [POIIDEN]", "One-Time Payment [PEA1PAY]", "One-Time Payment Inquiry [PEI1PAY]", "Address List Inquiry [PPIADDR]", "Comment [PPACMNT]", "Person Experience [PPAEXPR]", "General Information [PPAGENL]", "Certification Information [PPACERT]", "Person Skills [PPASKIL]", and "Telephone [PPATELE]". The "Employee Search Form" option is highlighted. On the right side, there is a "My Links" section with links for "Change Banner Password", "Check Banner Message", and six "Personal Link" items. Below the links is a "My Institution" section with a "SUNGARD" logo and a photo of a building. At the bottom, a "Banner Broadcast Messages" section shows a message from 18-JAN-2005: "Banner 7.1 development under way." The status line at the very bottom contains the text "Press ENTER to start selection or expand/collapse menu." and "Record: 1/1" followed by a "<OSC>" button.



Section F: Help Features

Lesson: Self Check

◀ Jump to TOC

Directions

Answer the following questions. Try to do this without using your workbook notes.

Question 1

Online Help is available for all forms.

True or False

Question 2

Selecting Online Help Query will display the Dynamic Help Form (GUAHELP) in Query mode, which is used to display help for a field, block or form.

True or False

Question 3

Which of these documents can NOT be accessed directly from your computer using Banner Bookshelf?

- a) User Manuals
- b) Training Materials
- c) Release Guides
- d) Implementation Guides

Question 4

Under the Help pull-down menu, which menu bar item would you select to view a list of actions that can be accessed through keystrokes?

- a) Show Keys
- b) Help (Item Properties)
- c) Banner Bookshelf
- d) Dynamic Help



Section F: Help Features

Lesson: Self Check (Continued)

◀ [Jump to TOC](#)

Question 5

To view a list of all of the properties in the current field that you are in, you would view which type of help?

- a) Show Keys
- b) Help (Item Properties)
- c) Banner Bookshelf
- d) Dynamic Help

Question 6

If you wanted to view the error or processing messages at the bottom of a form, you would look at the Auto Hint/Status Line.

True or False



Section F: Help Features

Lesson: Answer Key

◀ Jump to TOC

Question 1

Online Help is available for all forms.

True. With the exception of a few security forms, Online Help is available for all forms.

Question 2

Selecting Online Help Query will display the Dynamic Help Form (GUAHELP) in Query mode, which is used to display help for a field, block or form.

False. Selecting Dynamic Help Query will display GUAHELP.

Question 3

Which of these documents can NOT be accessed directly from your computer using Banner Bookshelf?

- a) User Manuals
- b) Training Materials**
- c) Release Guides
- d) Implementation Guides

Question 4

Under the Help pull-down menu, which menu bar item would you select to view a list of actions that can be accessed through keystrokes?

- a) Show Keys**
- b) Help (Item Properties)
- c) Banner Bookshelf
- d) Dynamic Help

Question 5

To view a list of all of the properties in the current field that you are in, you would view which type of help?

- a) Show Keys
- b) Help (Item Properties)**
- c) Banner Bookshelf
- d) Dynamic Help



Section F: Help Features

Lesson: Answer Key (Continued)

◀ [Jump to TOC](#)

Question 6

If you wanted to view the error or processing messages at the bottom of a form, you would look at the Auto Hint/Status Line.

True.



Release Date

◀ [Jump to TOC](#)

This workbook was last updated on 9/29/2006.