

Banner 7 Navigation Basics

<http://portico.angelo.edu>

Table of Contents

Logging in to Banner	2
Layout of Banner Screen	3
Form Names.....	4
Accessing Forms.....	5
Parts of a Form.....	6
Navigating Forms	7
Creating a Personalized Menu with My Banner.....	8
Adding a Form.....	8
Querying to Locate a Form	10
Changing the Description of a Form.....	10
Removing a Form.....	10
Make My Banner the Default Menu	11
Changing Password.....	12
Appendix.....	13
Oracle Jinitiator Installation	14
Support System.....	17



Logging in to Banner

In contrast to our legacy administrative systems, which ran on a mainframe computer, Banner runs in an Internet environment (referred to as INB or Internet Native Banner).

- Access Banner at: <http://portico.angelo.edu> or <http://banner>
- Click “**Logon to Banner**”
- Click the [Banner Logon](#) Link

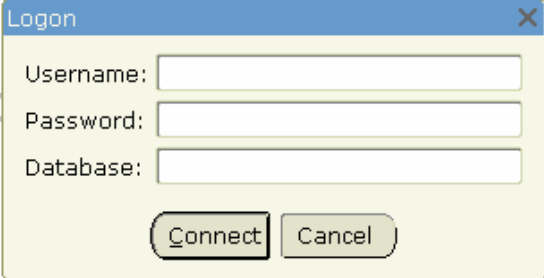
Like most information systems, you will have to supply a username and password. Your username is the same as your email account name (usually first initial last name, up to eight characters). You will be assigned a temporary password which must be changed immediately upon logging in the first time.

NOTE: When Banner is accessed for the **FIRST** time on a computer, a prompt will appear to download and install the Oracle JInitiator plug-in. (See page 14 for installation instructions) After JInitiator has been successfully installed; the typical login screen should appear. If it does NOT appear, close the browser, reopen it, and go to the Banner web address again.

IMPORTANT: In the status bar at the bottom of the desktop, there will be an Internet Explorer window AND an Oracle window open when Banner is running. The "Oracle Developer Forms Runtime - Web" window looks like a teacup with steam rising. **If either of these windows is closed, Banner will terminate.**

Once the Oracle window loads, the logon dialog box will appear:

- Click the Username field
- Enter your username
- Tab to the Password field
- Enter your password
- **The Database field will be filled in with the name of the database.**

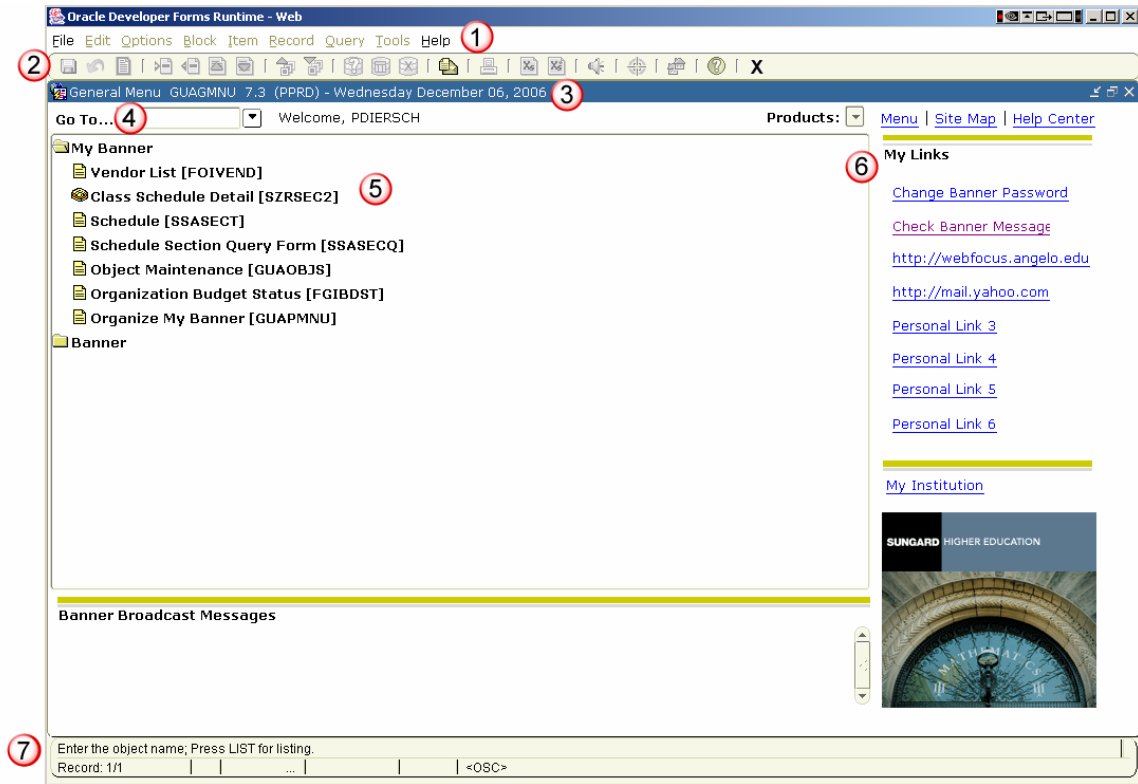


Click {Connect} or press Enter.

When you login for the first time, you will need to change your password. The password will expire every 120 days. A warning will be displayed when you need to change your password. The procedure for changing your password is described on page 12.



Layout of Banner Screen



1. **Menu Bar** – contains pull-down menus of functions and commands that can be performed in Banner. If the menu is dimmed, that item is not available.
2. **Tool Bar** – contains buttons to access commonly used tasks
3. **Title Bar** – shows the descriptive name, the seven character form code, versions number, and database name. This information may be modified in the preferences section.
4. **Direct Access** – enables quick access to forms
5. **Banner Forms Menu Area** – hierarchical tree structure
6. **My Links** – Customizable area to display links to various websites. This information is modified in the preferences section.
7. **Auto Hint Line** – displays hints, error messages, number of records, and if a List of Values is available



Form Names

Each form in Banner is identified by a seven character code. Knowing the position format of the form code will help you become familiar with commonly used forms.

Example: **[GUAPSWD]**

Position 1 – the primary system owning the form.

Most common systems are:

A – Advancement	P – Human Resources / Payroll
F – Finance	R – Financial Aid
G – General	S - Student

[GUAPSWD] belongs to the General system

Position 2 – the module owning the form

Unique to the product identified in position 1

[GUAPSWD] is a utility form in the General system

Position 3 – the type of form

Same for all products:

A – Application	R – Rule Table
B – Base Table	V – Validation
I – Inquiry	M – Maintenance
P – Process	

[GUAPSWD] is an application type

Positions 4 – 7 – unique four character code for form

[GUAPSWD] assists in changing the user password

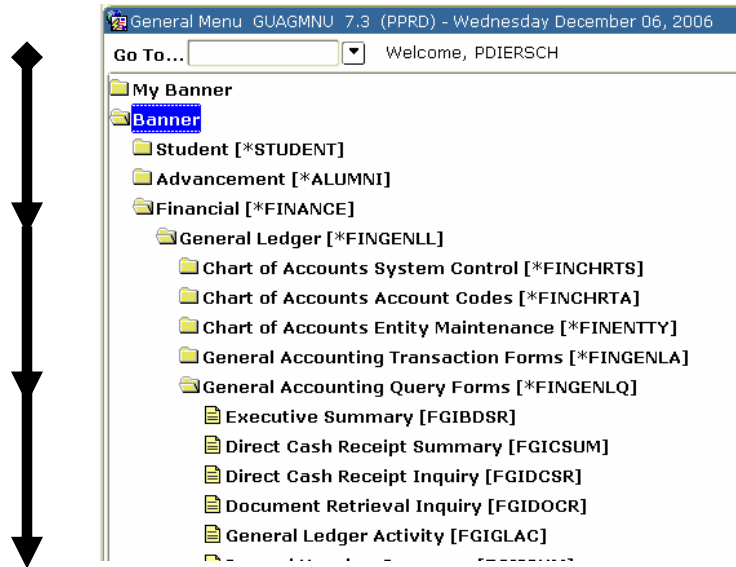


Accessing Forms

Forms can be accessed through the Banner Forms Menu Area or the Direct Access field.

Opening forms from the Banner Forms Menu (located in **[GUAGMNU]**):

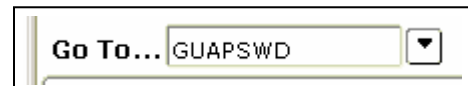
- Click the plus symbol (drill-down) to expand the appropriate category
- Continue to drill down, until the correct form is located



- Double-click the form name to open it

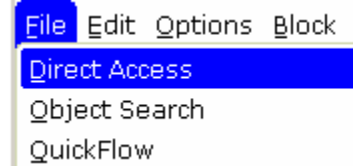
Opening forms from the Direct Access field (located in **[GUAGMNU]**):

- Click once in the Direct Access field
- Type in the form's seven character code
- Press Enter
- The form will open



Opening forms from the *File menu*:

- Click the *File menu* and select "Direct Access"
- The "Go To..." box will appear at the top of the form
- Type in the form's seven character code
- Press Enter



Once you have opened a form, it will appear at the bottom of the *File menu*

- Preferences
1. FOIDDOCH Document History
 2. FGIBDST Organization Budget Status
 3. SGASTDN General Student
 4. GUAPSWD Oracle Password Change
 5. GUAUPRF General User Preferences Maintenance
 6. GUAMESG General Message
 7. GUAIDEN User Identification Control

Parts of a Form

Common elements you will find on a form:

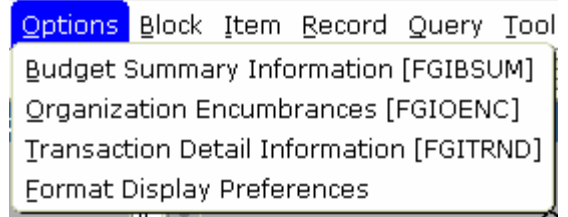
The screenshot shows the Oracle Developer Forms Runtime interface. The menu bar (1) includes File, Edit, Options, Block, Item, Record, Query, Tools, and Help. The toolbar (2) contains various navigation and action icons. The key block (3) contains search fields for Organization (60210), Fund (0100), Program (6020), Account, Account Type, Activity, and Location. The information block (5) is a table with columns: Account Type, Title, Adjusted Budget, YTD Activity, Commitments, and Available Balance. A search icon (4) is located in the key block. The status bar at the bottom shows 'Record: 1/1' and '<OSC>'.

1. **Menu Bar** – access various functions to perform on the form
(If the menu is dimmed, it is inactive)
2. **Toolbar** – contains one-click access to commonly used functions
3. **Key Block** - The first block of a form. It contains identification information related to the form's function. It allows you to search for the unique identifier or the record you want to view. To move from the Key Block, you must perform a Next Block function
4. **Search icon** – Assist you in conducting a search for values of the field
5. **Information Block** – Displays data associated with the Key Block. Use the Next Block function to navigate through multiple blocks.



Navigating Forms

There are a multitude of ways to navigate Banner forms:



Options menu –

- Select the Options menu to see a list of related forms
- Context specific to the active information block

Block menu –

- Use to perform the Previous, Next, and Clear block function

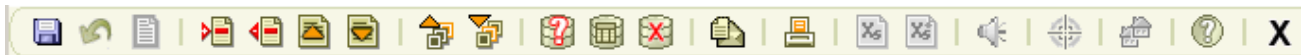
Scroll Bars –










- May be located on the horizontal right of a form, or at the bottom of a form
- Make sure that the form is expanded fully, so you will know if there are any bottom scroll bars



Toolbar –

- Contains buttons to easily perform menu functions



	Function	Keyboard Shortcut	Description
	Save	F10	Saves all changes made
	Rollback	Shift + F7	Clears all information and returns to the Key Block
	Select	Shift + F3	Enters the highlighted value into the current field
	Enter Query	F7	Activates the Query function
	Execute Query	F8	Uses criteria to search the database
	Previous Block	Ctrl + PgUp	Moves to the previous information block
	Next Block	Ctrl + PgDn	Moves to the next information block
	Online Help		Displays information about the active form
	Exit	Ctrl + Q	Closes the form. Will exit Banner if you are in a menu.

Creating a Personalized Menu with My Banner

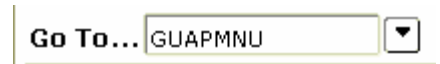
My Banner is a feature of the Banner system to create a personalized menu of frequently accessed forms.

Ligon to Banner: <http://portico.angelo.edu>

REMINDER: Both windows must remain open, or the Banner session will end.

Open “My Banner Maintenance” form **[GUAPMNU]**:

- Use the Direct Access method
 - In the Direct Access field, type GUAPMNU
 - Press Enter
- Use the Banner Forms Menu Area
 - Click the plus sign beside “My Banner”
 - Double-click “Empty; Select to build [GUAPMNU]”



Go To... GUAPMNU ▼

Adding a Form

- Scroll to find the form you wish to add
- Click once on the name of the form. The name of the form will turn white.
- Click on the right arrow to add the form to My Banner

Another way to add a form to My Banner is to manually type in the seven character code.


- Click below the Name category in the right side pane of the form.
- Type in the form code
 - Ex. **[GUAPSWD]** is the form to change your password
- Press Enter

Notice the description of the form will be added automatically.





My Banner Maintenance GUAPMNU 7.3 (TEST7)

PDIERSCH's Personal Menu

Type: Oracle Forms module 

Object	Description
TSA1098	1098-T Tax Information
FTMITYP	1099 Income Type Code Maintenance
FAA1099	1099 Reporting
FOA1099	1099-MISC Magnetic Tape Transmitter D
PXA1099	1099-R
PTV1099	1099-R Distribution Code Validation
GUAABOT	About Banner

Object	Description
FOIVEND	Vendor List
SZRSEC2	Class Schedule Detail
SSASECT	Schedule
SSASECQ	Schedule Section Query Form
GUAOBS	Object Maintenance
GUAPSWD	Oracle Password Change



- Click the Save button  to save the contents of the menu.
- Close **[GUAPMNU]** 

NOTE: The change to the contents of My Banner will not appear until you exit Banner and logon again.



Querying to Locate a Form

If you do not know the seven character code of a form, you can execute a query to find it.

- Click once in the left pane of **[GUAPMNU]**
- Select Enter Query from the Query menu (F7) 
- Enter the search criteria using the wildcard (%) if necessary
- Select Execute Query from the Query menu (F8) 

Changing the Description of a Form

Banner will add a description for the form automatically. However, you may change the description to suit your needs.

Add the form **[FGIBDST]**

The description of the form will be highlighted in blue.


NOTE: If you click off of the description, you can highlight the entire description by triple-clicking it.

- Type a new description.
 - Ex. “View the department budget”
- Press Enter.
- Save the menu.

Removing a Form

There may come a time when you no longer need to access a form. You will want to remove it from the My Banner menu.

Open the My Banner form **[GUAPMNU]**

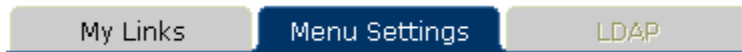
- Click once on the form(s) you want to remove. The text will turn white
- Click the left arrow.  (Or choose *Record – Remove*)
- Save the menu.



Make My Banner the Default Menu

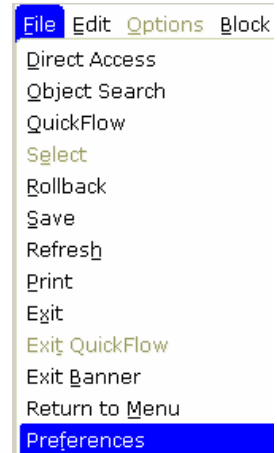
When you logon to Banner, notice that My Banner is collapsed, while Banner is expanded to reveal the many form categories. The Preferences section can be used to make My Banner expanded and Banner collapsed when you logon.

- Choose *File – Preferences*
 - [GUAUPRF] will open.
- Click the {Menu Settings} tab




- In the User Default field, type **“PERSONAL”**

“My Banner” will appear automatically in the next field.



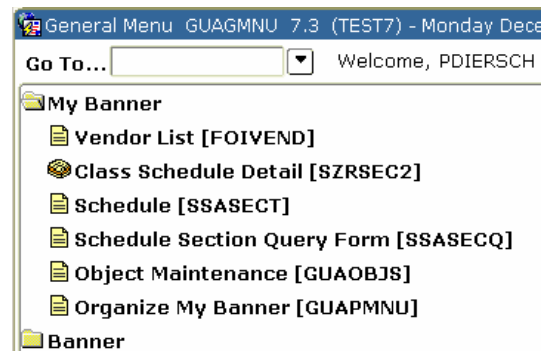
Starting Menu Option

Description:	Enter the name of your preferred start-up menu.	
Default Value:	*MENU	Products Menu
User Default:	*PERSONAL	▼ My Banner

- Click the Save button 
- Click {OK}
- Click {OK}

For changes to be applied, exit Banner and logon again.

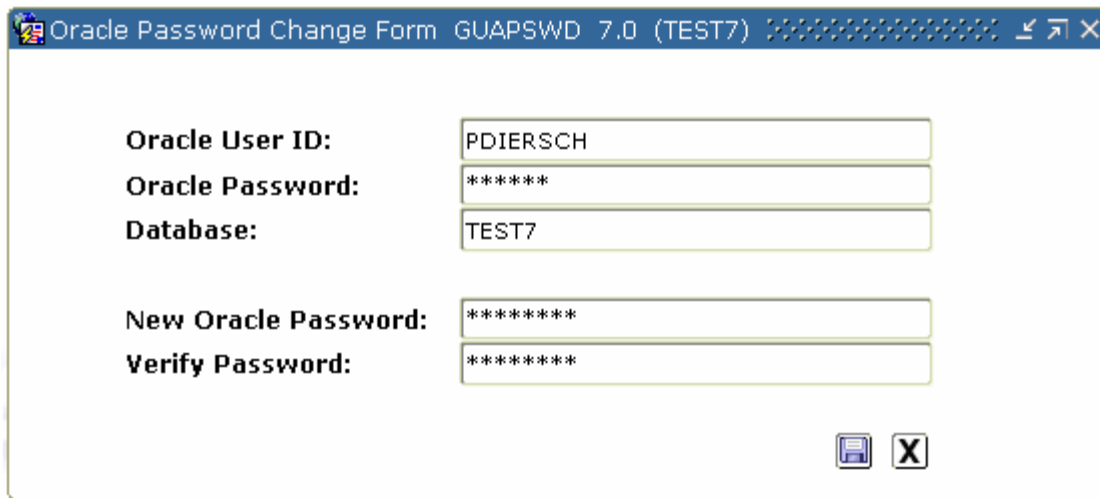
The next time you logon, you will see My Banner expanded, and Banner collapsed.



Changing Password

Your password will be active for 120 days. When the password has expired, a warning will appear, and you will need to change your password.

- Open the form [GUAPSWD]
- Enter in the appropriate information
- Click {OK}



Oracle Password Change Form GUAPSWD 7.0 (TEST7)

Oracle User ID: PDIERSCH

Oracle Password: *****

Database: TEST7

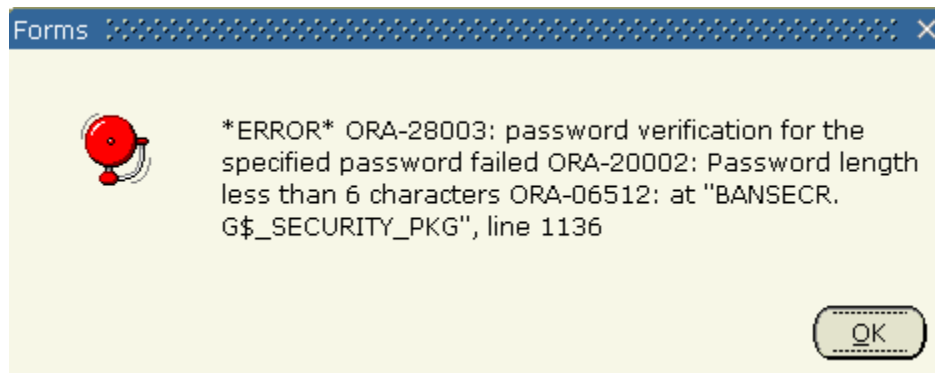
New Oracle Password: *****

Verify Password: *****

Save Close

Some restrictions to your password:

- Must be at least 6 characters in length
- Cannot be your username
- Numbers and letters are accepted, and a few other characters
 - `_`, `-`, `+`, `*`, `^`, `!` are accepted
- Must be a different password from previous two changes



Appendix



Oracle JInitiator Installation

Before using Banner for the first time, you will need to install **JInitiator**. **JInitiator** enables your computer to display a Java applet in which the Banner interface resides. The installation takes approximately two minutes to complete.

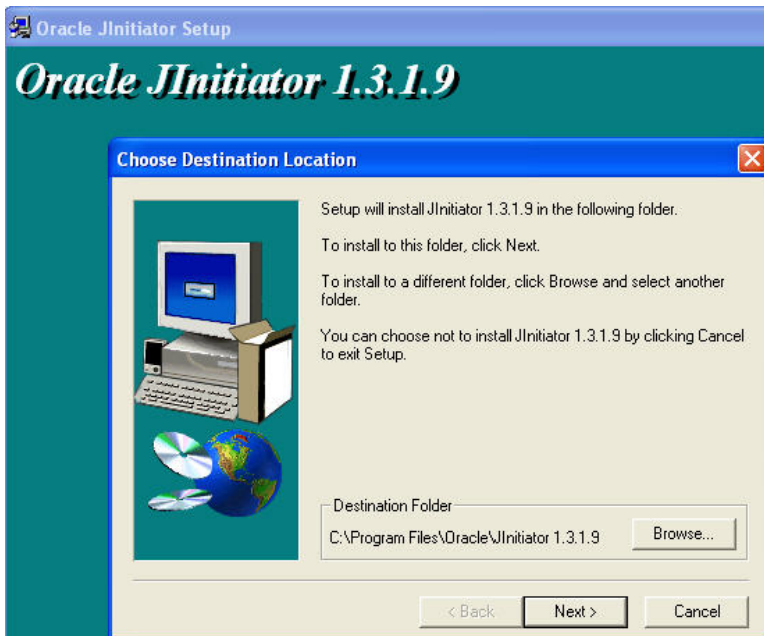
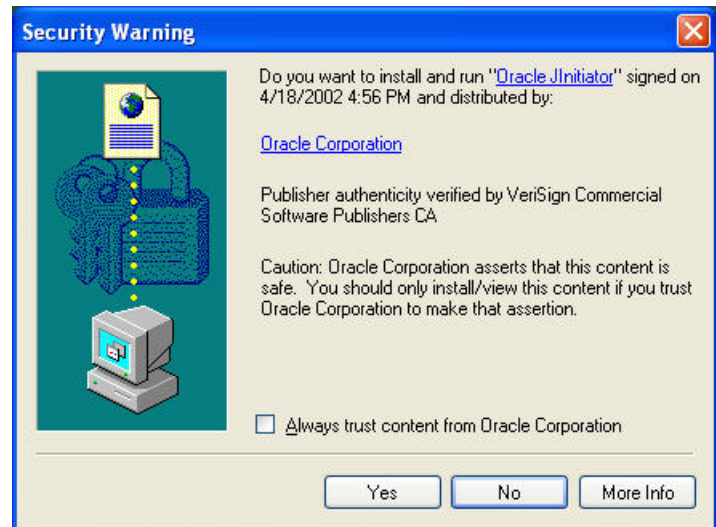
Point your browser to <http://portico.angelo.edu>

Click **Logon to Banner** on the left hand side menu

Click **Banner Logon**

Another browser window will open, and a security warning dialog box will open.

Click **Yes**



The browser window will be replaced with an install screen. Another dialog box will open.

Click **Next**

The installation process will begin.



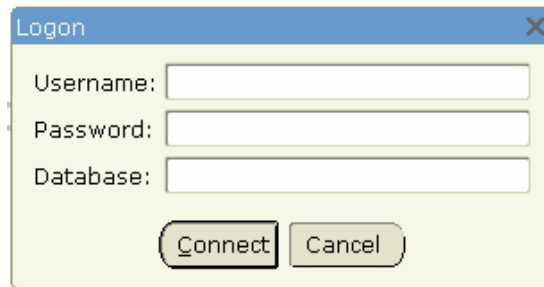
When installation is complete, the following dialog box will appear.



Click **OK**



The browser window will change slightly, a Java window will open (**Oracle Developers Forms Runtime - Web**), and the Banner logon dialog box will appear.



Congratulations! Your computer is now configured to use the Banner system.

**** REMEMBER ****










If you use another computer to access Banner, you may need to go through these steps again, if **JInitiator** has not been installed by a previous user.

Both windows must stay open for your Banner session to remain active.



Banner Shortcuts

FUNCTION	KEYSTROKE	FUNCTION	KEYSTROKE
FORM		QUERY	
Command Menu	Alt key	Cancel Query	Ctrl - Q
Clear Form /Rollback	Shift-F7	Count Query Hits	Shift - F2
BLOCK		Enter Query	F7
Next Block	Ctrl - Page Down	Execute Query	F8
Previous Block	Ctrl - Page Up	Exit With Value	Shift - F3 or Enter
Clear Block	Shift - F5	Wildcard	%
FIELD		OTHER	
Clear Field	Ctrl - U	Commit /Accept /Save	F10
Duplicate Field /Item	F3	Menu	Alt key
Next Field	Tab or Enter	Enter	Enter
Previous Field/ Item	Shift - Tab	Exit /Cancel	Ctrl - Q
Delete Backward	Backspace	Print	Shift - F8
Delete Character	Delete	List of Values	F9
RECORD		CURSOR MOVEMENT	
Clear Record	Shift-F4	Left	Left Arrow
Remove Record	Shift - F6	Right	Right Arrow
Duplicate Record	F4	Move Left One Word	Ctrl - Left
Insert Record	F6	Move Right One Word	Ctrl - Right
Next Record	Down Arrow	Scroll Up	Page Up
Previous Record	Up Arrow	Scroll Down	Page Down
Next Set of Records	Page Down	HELP	
		Help	F1
		Show Function Keys	Ctrl - F1

	Function	Keyboard Shortcut	Description
	Save	F10	Saves all changes made
	Rollback	Shift + F7	Clears all information and returns to the Key Block
	Select	Shift + F3	Enters the highlighted value into the current field
	Enter Query	F7	Activates the Query function
	Execute Query	F8	Uses criteria to search the database
	Previous Block	Ctrl + PgUp	Moves to the previous information block
	Next Block	Ctrl + PgDn	Moves to the next information block
	Online Help		Displays information about the active form
	Exit	Ctrl + Q	Closes the form. Will exit Banner if you are in a menu.



Support System

Your first point of contact for Banner support should be the Portico website.

<http://banner.angelo.edu>

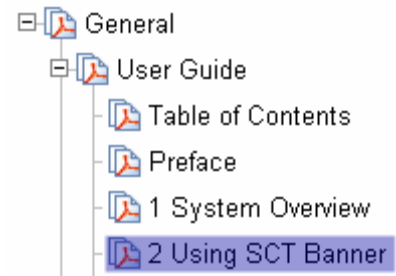
This site contains training materials, news updates, a preview of the Luminis portal, and a FAQs page for common issues.

Utilize the **Ask Portico** feature, located in the FAQs section, to submit questions and comments.



Clicking the Bookshelf button on the toolbar will open the Banner Documentation Bookshelf (PDF format).

- Click the Bookmarks tab if it is not already open
- Click the plus sign beside “General”
- Click the plus sign beside “User Guide”
- Click “2 Using SCT Banner”
- This section is also available on the Portico Training Library website



The next step would be to call (**1-866-942-2911**) or email (helpdesk@angelo.edu) the IT Help Desk. The IT Help Desk will assist you with:

- Password resets
- Username recall
- Basic Navigation
- Basic Troubleshooting

If the problem is related to a particular system (i.e., question regarding a Purchase Order), the IT Help Desk will direct you to the appropriate person for assistance.

