



BANNER BASICS

How-to Guide

Fall 2017

BANNER BASICS

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ABOUT BANNER

Banner is the comprehensive software solution that MSU Denver uses to support numerous aspects of institutional management. Banner provides the features and processing capabilities needed for storing, retrieving and integrating:

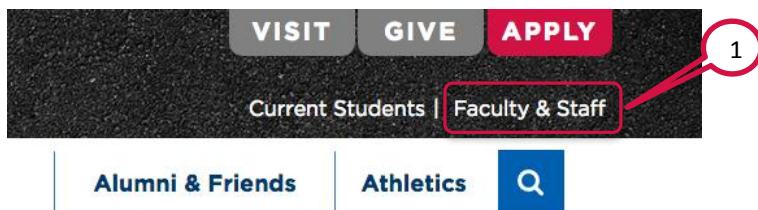
- Student information (admissions, registration, etc.)
- Alumni information (sponsor identification, campaign management, etc.)
- Human resources information (employee benefits, salary/deduction history, etc.)
- Financial aid information (needs analysis, packaging, etc.)
- Finance information (general ledger, accounts payable, accounts receivable, etc.)

Various MSU Denver departments/divisions use Banner for different purposes. This tutorial provides basic information about using Banner, but job specific information is provided by the individual departments/divisions.

ACCESSING BANNER

The initial time you access Banner, your MSU Denver password will automatically synchronize with your Banner password. For the initial login, please use the following method to access Banner:

1. Open the Internet Explorer web browser and go to the Faculty & Staff Hub webpage at www.msudenver.edu/facstaff/.



2. Click on the **Internet Native Banner** link under the **Employee Systems, Services & Reporting** section.



3. Log in using your MSU Denver NetID (the first part of your email address - everything before the @ symbol).
4. In the **Password** text entry box, type your temporary password.
5. The Database field should always remain blank.
6. Click the **Connect** button.

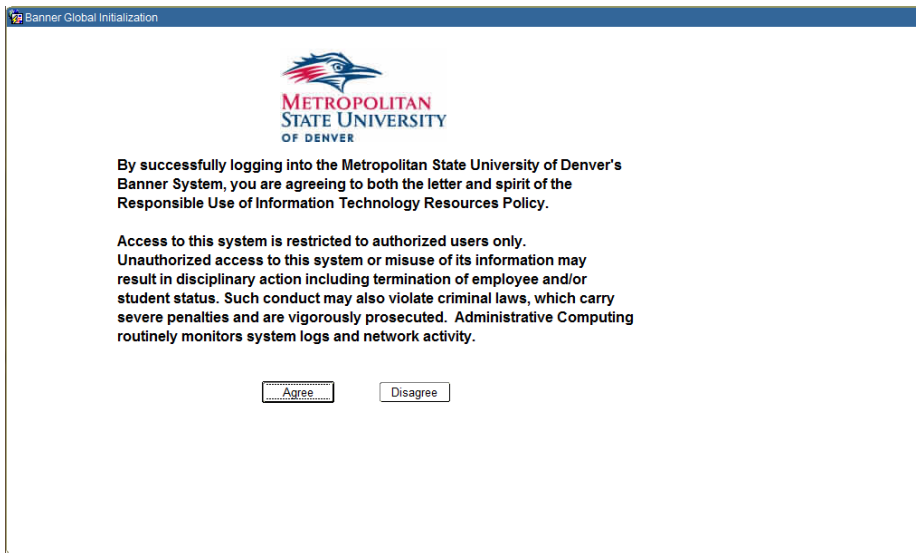
Logon

Username:

Password:

Database:

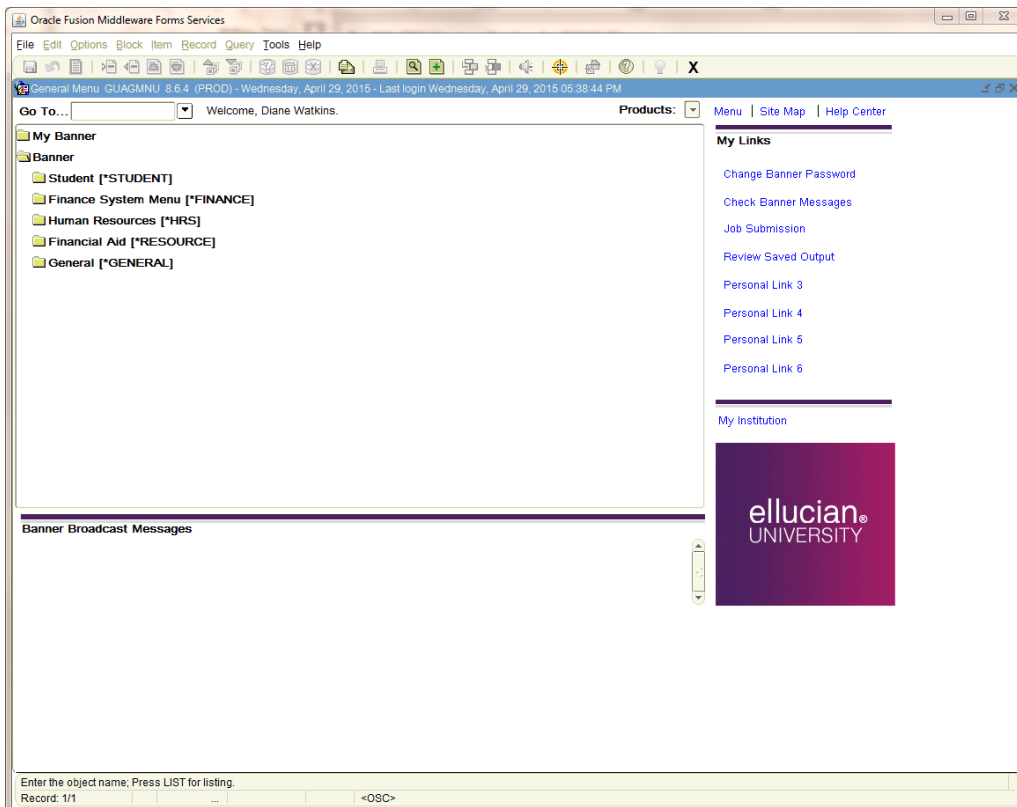
The **Responsible Use of Information Technology Resources Policy** screen will display. After reading the information on the screen, click the **Agree** button to log into Banner or the **Disagree** button to cancel.



INSIDE BANNER


THE MAIN MENU WINDOW

The Banner user interface is designed to be easy to navigate and provides various options for accessing the various modules. The Main Menu is the starting point for navigating within Banner.



NAVIGATING IN BANNER

There are several methods for navigating within Banner. The following table shows the various methods for performing common functions in Banner. Please note: The available options are dependent on the current form or screen you are currently using within Banner.

Function	Tool Bar Icon	Menu Bar	Shortcut Keys
Save		File → Save	F10
Rollback		File → Rollback	Shift-F7
Select		File → Select	Shift-F3
Insert Record		Record → Insert	F6
Clear Record		Record → Clear	Shift-F4
Remove Record		Record → Remove	Shift-F6
Previous Record		Record → Previous	
Next Record		Record → Next	
Previous Block		Block → Previous	
Next Block		Block → Next	
Enter Query		Query → Enter	F7
Execute Query		Query → Execute	F8
Cancel Query		Query → Cancel	Esc
List		Help → List	F9
Print		File → Print	Shift-F8
Exit, Cancel Query		File → Exit	Ctrl-Q
Show Shortcut Keys			Ctrl-F1

BANNER FORMS

Banner consists of forms that are simply online documents in which information can be entered or retrieved. Each individual form is divided into blocks. Blocks are areas on a form that contain related information. There are two types of blocks. A key block is the first block on most forms. This block will determine what is entered or displayed on the form. This block stays on the form while other blocks display below it. The key block contains the information that you already know. The next type of block is the information block. These are the areas of data that are related to the form and contain what is retrieved from the database.

The screenshot displays the Oracle Fusion Middleware Forms Services interface for the SPAIDEN form. The window title is "Oracle Fusion Middleware Forms Services: Open > SPAIDEN [Q]". The menu bar includes File, Edit, Options, Block, Item, Record, Query, Tools, and Help. The toolbar contains various icons for navigation and actions. The form title is "General Person Identification SPAIDEN 8.5.3.1 (PROD)".

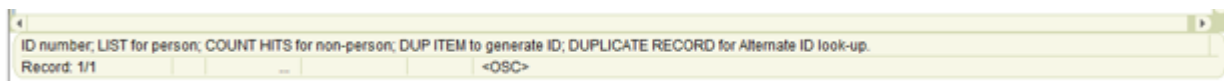
Annotations with red boxes and arrows point to specific parts of the form:

- Key Block:** Points to the top section containing an ID field and a "Generate ID" button.
- Information Block:** Points to the main data entry area, which is divided into "Person" and "Non-Person" sections. The "Person" section includes fields for Last Name, First Name, Middle Name, Prefix, Suffix, Preferred First Name, and Full Legal Name. The "Non-Person" section includes a Name field. To the right, there are sections for "ID and Name Source" (Last Update, User, Activity Date, Origin) and "Original Creation" (User, Create Date).
- Auto Hint/Status Line:** Points to the bottom status bar, which displays "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" and a "<OSC>" button.

USING THE AUTO HINT/STATUS LINE

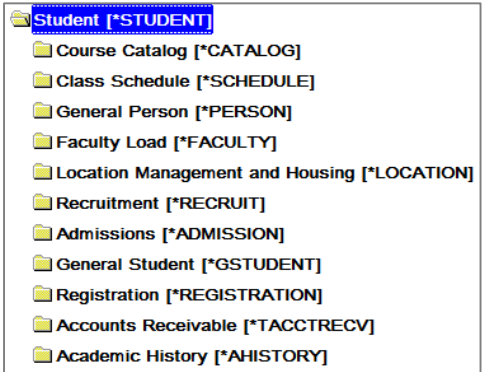
The Auto Hint/Status Line appears at the bottom of the screen and provides information or hints that pertain to the current cursor location or process.

Error messages, processing messages, and keyboard equivalents appear in the status line. It is very important to pay attention to this information. Sometimes it's the only way to tell if Banner is executing a command. If you don't pay attention, you may print a report several times before you realize it was sent to the printer the first time!



ACCESSING FORMS VIA THE MAIN MENU

You can access a form via the Main Menu by double-clicking the form name.



FORM NAMING CONVENTIONS

Banner forms, reports, jobs, and tables have specific **seven-character** names. If you learn the naming conventions, it will help you to understand the **Banner** structure. The following table shows which privacy system owns the form, report, job or table based on the letter in position 1 of the name.

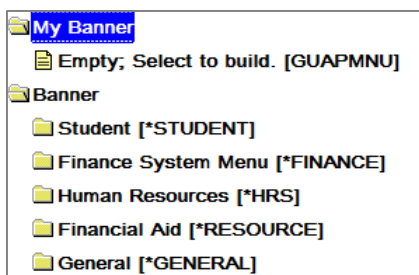
Letter in Position 1	Privacy System	Example
F	Finance	FTIIDEN
G	General	GUACALN
P	HR/Payroll/Personnel	POQMENU
R	Financial Aid	ROASTAT
S	Student	SPAIDEN
T	Accounts Receivable	TFADETL

MY BANNER

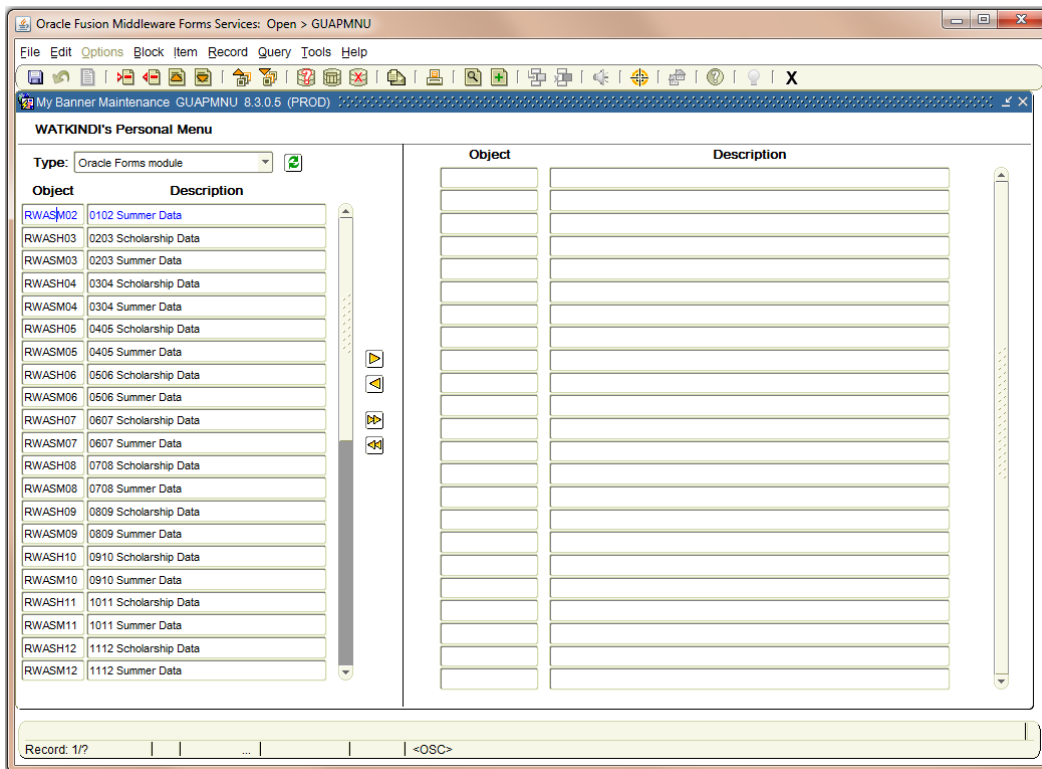
The My Banner folder allows you to create and access your list of customized forms, jobs, menus, and QuickFlows. It is highly recommended that you put the most often used forms in the My Banner folder for quick easy access.

SETTING UP A MY BANNER FOLDER

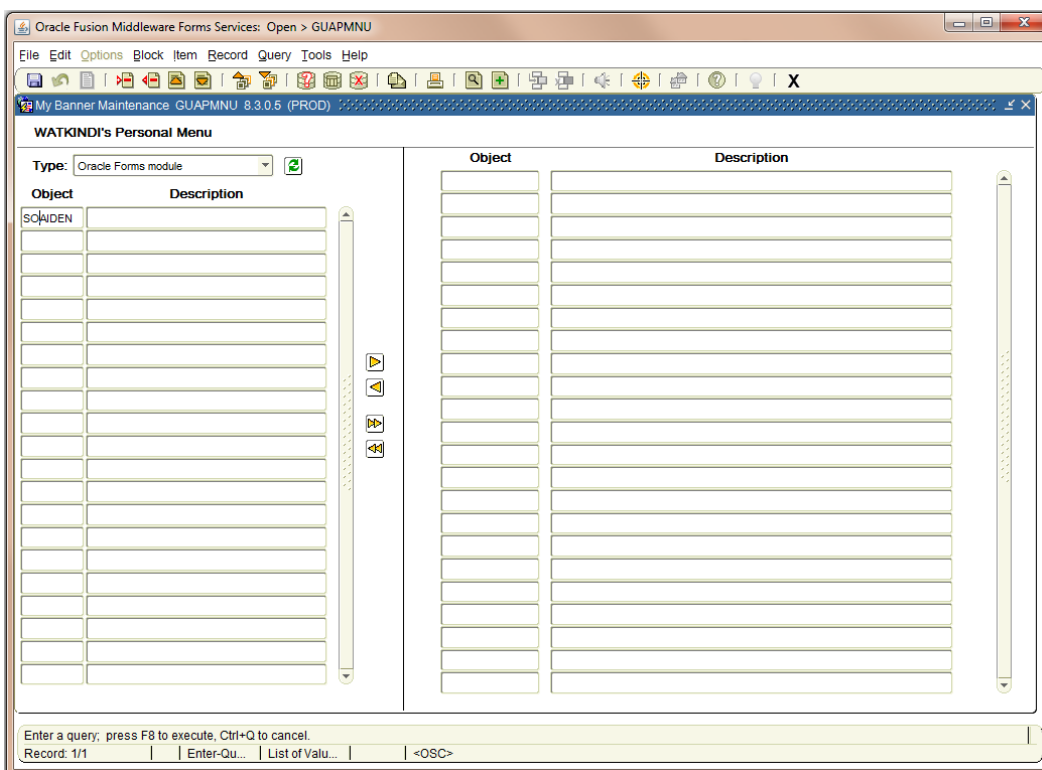
1. Double-Click the **My Banner** folder
2. Double-Click **Empty; Select to build. [GUAPMNU]** (A list of forms will appear on the left hand side of the screen.)



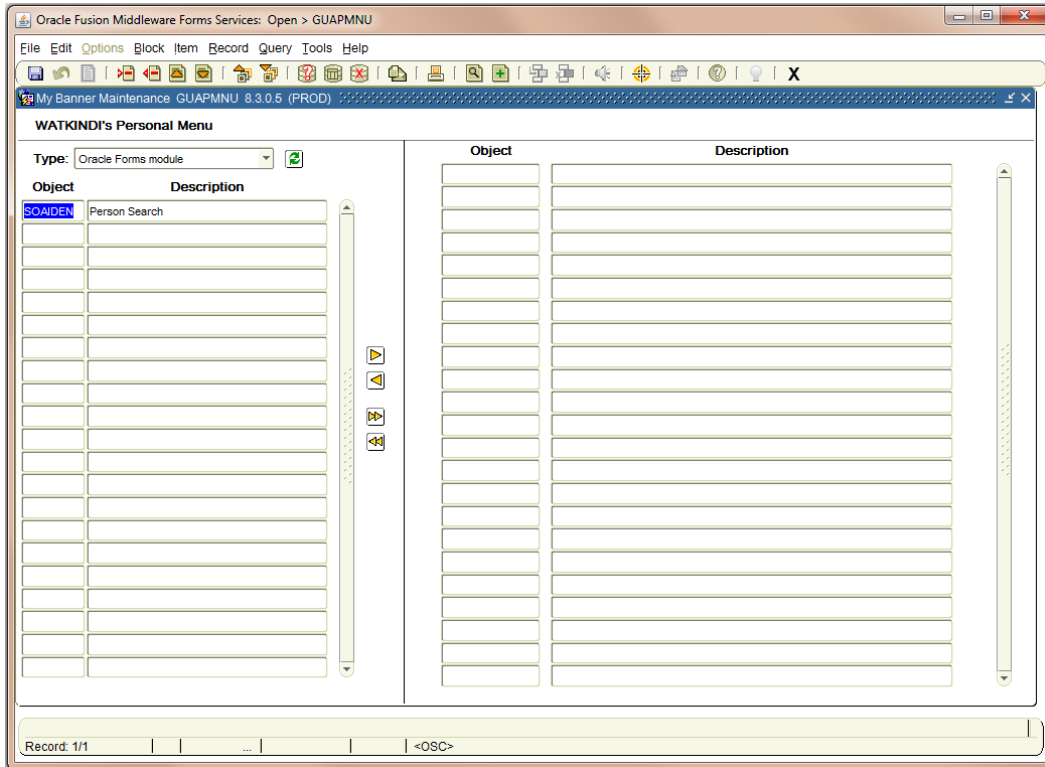
3. To search for a form to add to My Banner, click in the first field under Object (on the left side of the form)
4. Press **F7** (Enter the Query and that will clear that section)



5. Type in the form name
6. Press **F8** (Execute the Query and that will also add the description to the form)



7. The Form Description will display.



8. Double-click the form (Text will turn Blue)

9. Use the single yellow arrow key to move selected form over to the object and description field on right hand side.

10. Click the save icon on upper left hand corner of tool bar

You will need to exit Banner and login again to see the changes.

1. Click black **X**, until you are prompted to exit Banner session

2. Click **Yes** exit Banner session

3. Click the Refresh button on tool bar



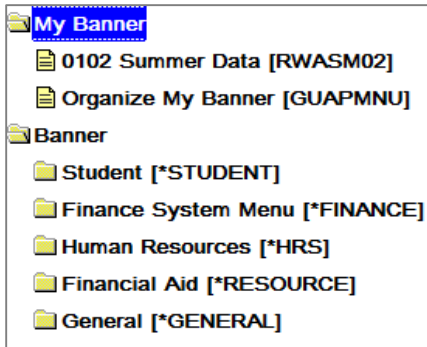
4. Log back into Banner

5. Double-click the **My Banner** folder

6. Selected forms will appear

EDITING THE MY BANNER FOLDER

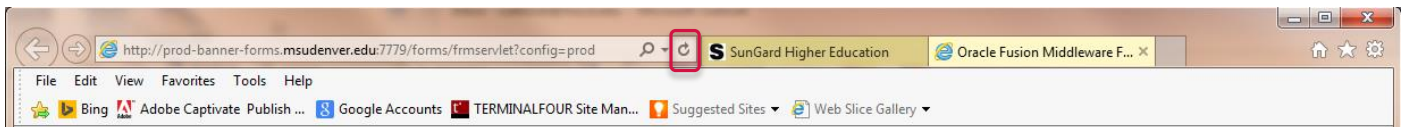
1. Double-click the **My Banner** folder
2. Double-click the **Organize My Banner** folder



3. To remove a single form, double-click the form (text will turn Blue)
4. Click single yellow arrows pointing to the left (to remove all forms use double yellow arrows)
5. Click **save**

You will need to exit Banner and login again to see the changes.

1. Click the black **X** on the tool bar
2. Click the black **X** until you are prompted to exit Banner session
3. Click **Yes**
4. Click refresh button on tool bar



5. Log in to Banner
6. Double-click the **My Banner** folder
7. Click the **My Banner** folder to display your personal menu