



BANNER TIPS AND TRICKS
Training Guide

Updated - October 2015

Banner Tips and Tricks

Introduction	2
Personalizing Banner.....	3
My Banner.....	3
Adding Items to My Banner	3
Working with and Editing My Banner	5
Personal Links	7
Colors	9
Adding Colors.....	9
Changing/Resetting Colors.....	11
Searching in Banner	12
General Search (GUISRCH).....	12
Reducing Your Search Results.....	13
Extracting Results into Excel	15
QuickFlows.....	16
GTVQUIK - Add Your QuickFlow to the Validation Table.....	17
GUAQUIK – Define/Create Your QuickFlow	18
GUAQFLW – Launching Your QuickFlow	19
GUAQFLW – QuickFlow Form (Searching for an Existing QuickFlow).....	21
Exit QuickFlow.....	22

Introduction

Banner Tips and Tricks is designed to show you many of the useful features available in Banner (also known as Banner INB). This guide is broken down into three (3) sections: Personalizing Banner, Searching in Banner and QuickFlows.

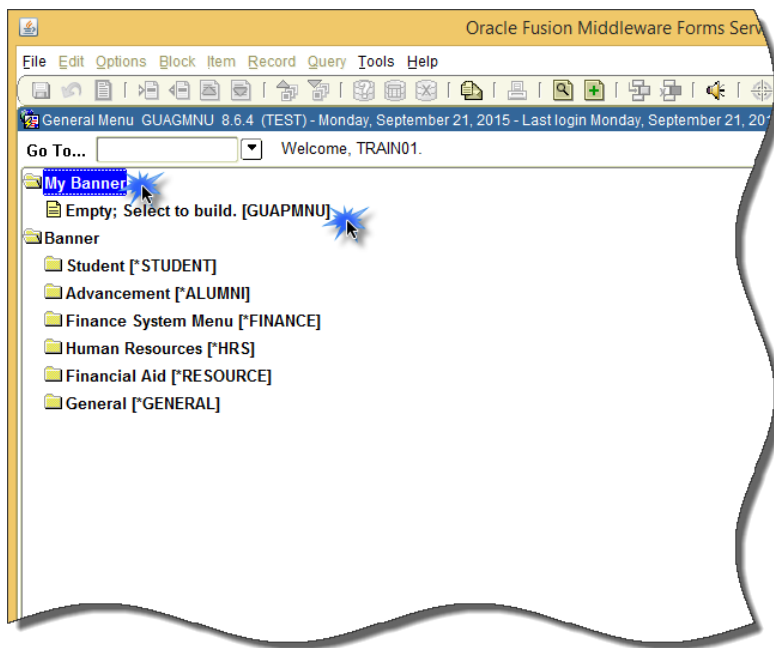
Personalizing Banner

Banner has some useful tools that allow you to personalize your Banner account. We will explore how to add items to My Banner, Create Personal Links and customize your colors in Banner.

My Banner

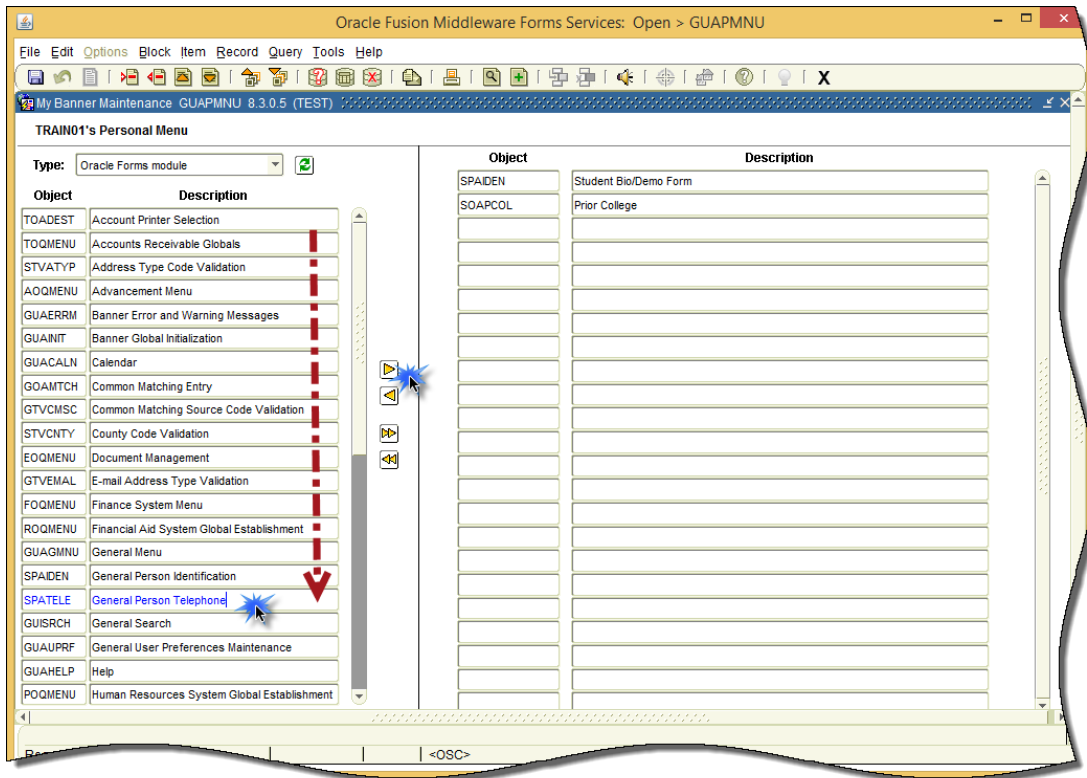
My Banner is located in the Hierarchical Tree Menu Structure Canvas on the Main Menu. Think of My Banner as a favorites folder; a place where you can add the forms you use most often when working in the system.



Adding Items to My Banner




1. Open **My Banner**
2. Select **GUAPMNU**
 - a. If you have not built your **My Banner**, it will say that it is empty

Banner Tips and Tricks



3. The My Banner Maintenance form will open – you have two options to add items to **My Banner**
 - a. Scroll through the list of forms (located in the table on the left)
 - b. Highlight the form by double clicking on it (it will turn blue when selected)
 - c. Click the **Insert Icon** 
 - d. The form will be inserted into your list (located in the table on the right)
 - e. When you are finished adding items, **Save**  your changes

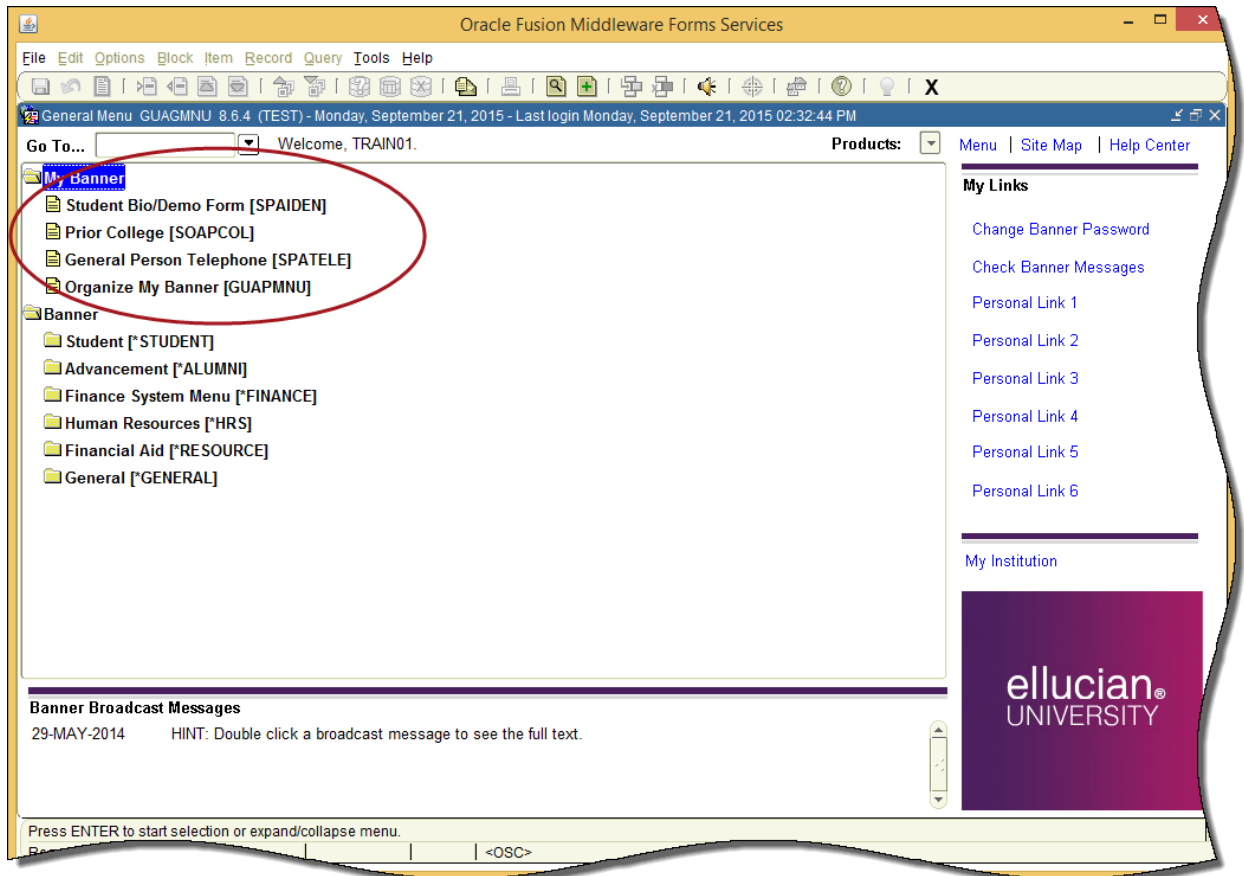
OR

- a. Enter the seven-character code directly into the Object Field in the table on the right
- b. Press the Tab Key
- c. The Form Description will display (you can edit the description)
- d. When you are finished adding items, **Save**  your changes

Banner Tips and Tricks

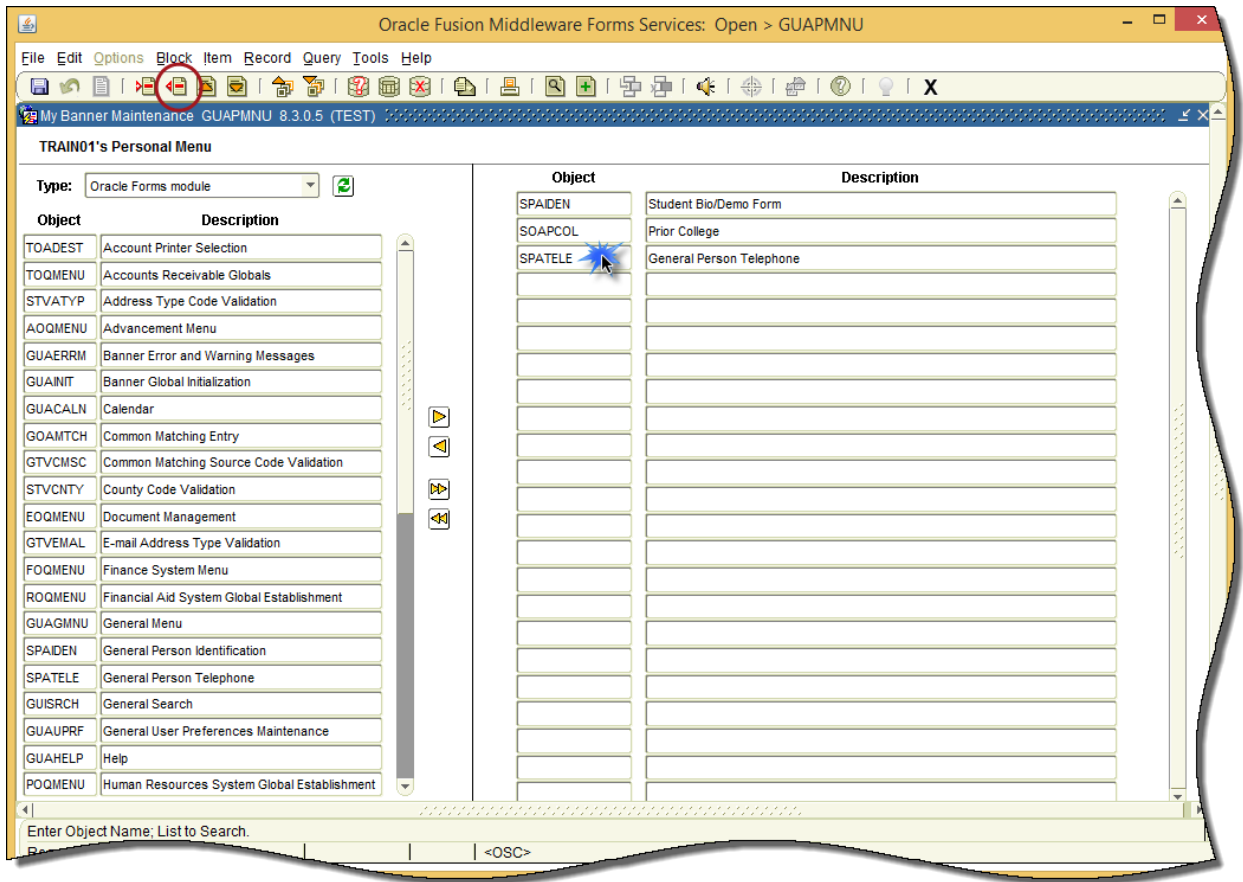
Working with and Editing My Banner



In order to refresh **My Banner**, you will need to sign out of Banner and sign back in.



1. Click on the **My Banner** folder to expand it
2. Double click on the item you want to open
3. To edit **My Banner**, select the **Organize My Banner (GUAPMNU)** link

Banner Tips and Tricks

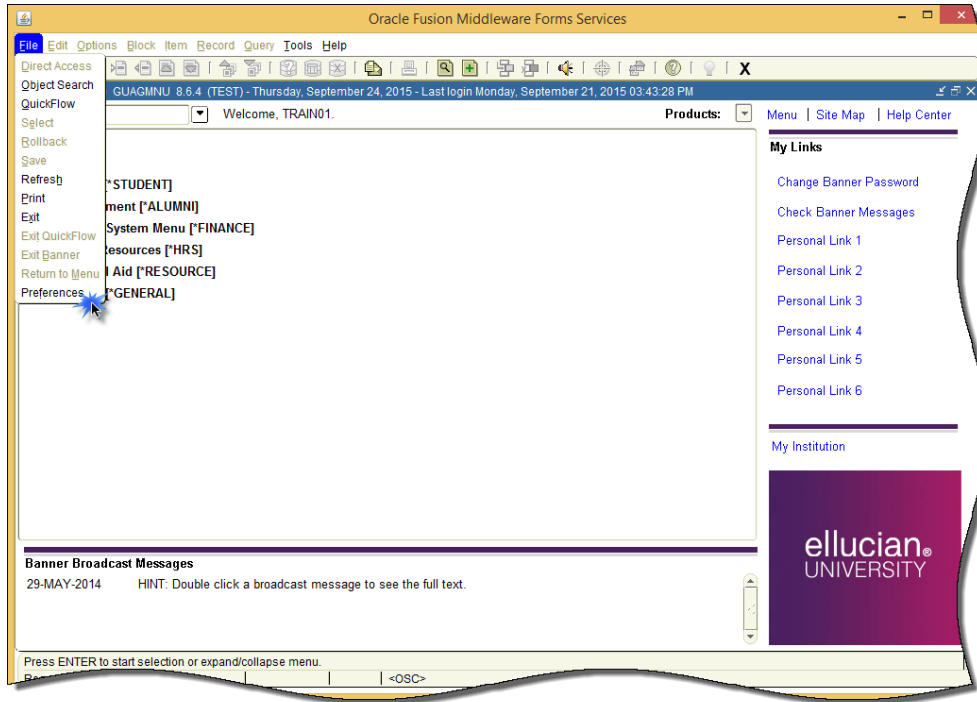


4. Click inside the field for the item in your list that you want to remove
5. Select **Record Remove** 
6. When you are finished deleting items, **Save**  your changes

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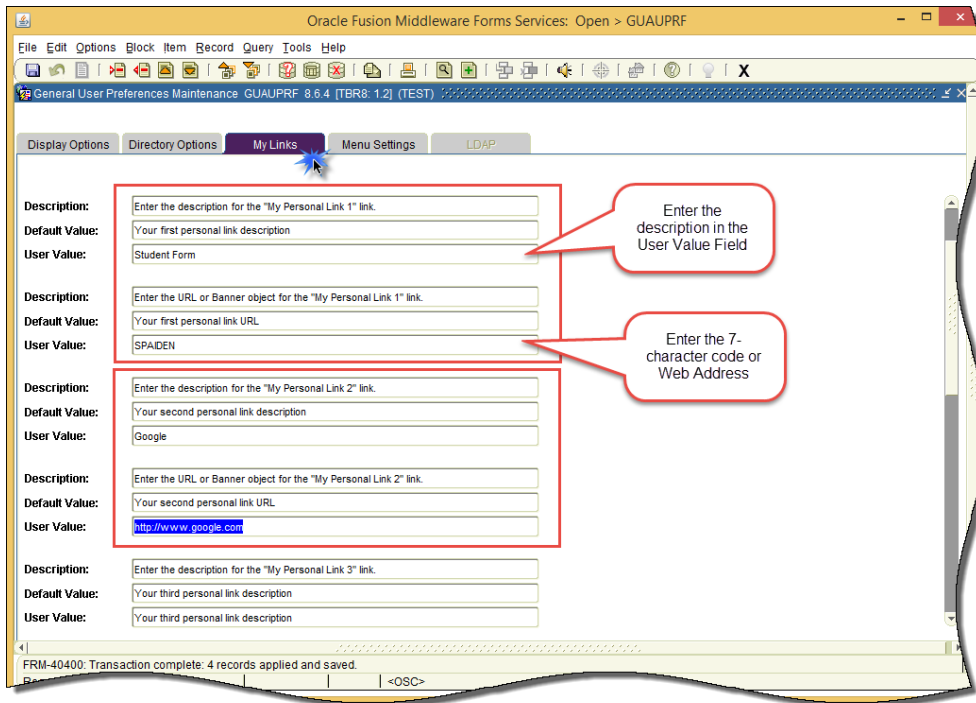
Personal Links

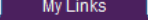

Similar to My Banner, Personal Links are available for you to set up, however, with Personal Links, you can include links to external Websites.

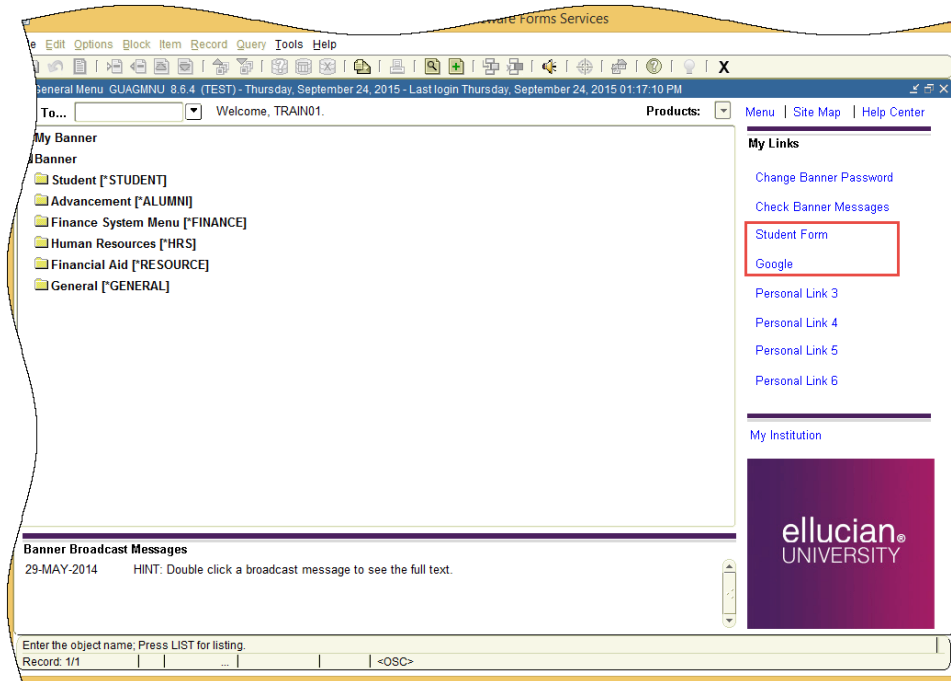


1. Click the **File Menu**
2. Click **Preferences**

Banner Tips and Tricks



3. Click the **My Links Tab** 
- a. Each Personal Link has two sections
4. Enter the description of the form or web address in the **User Value field**
5. Enter the 7-character code or web address in the **User Value field**
6. When you are finished adding items, **Save**  your changes



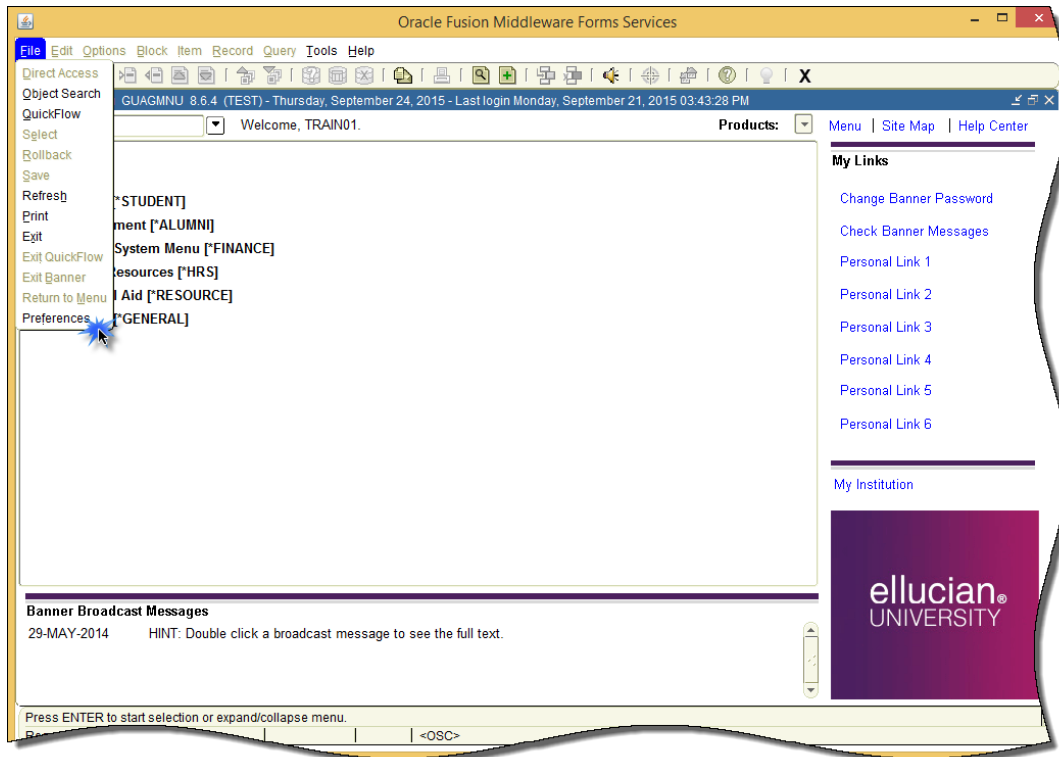
7. Next time you sign into Banner the descriptions will display

Banner Tips and Tricks

Colors

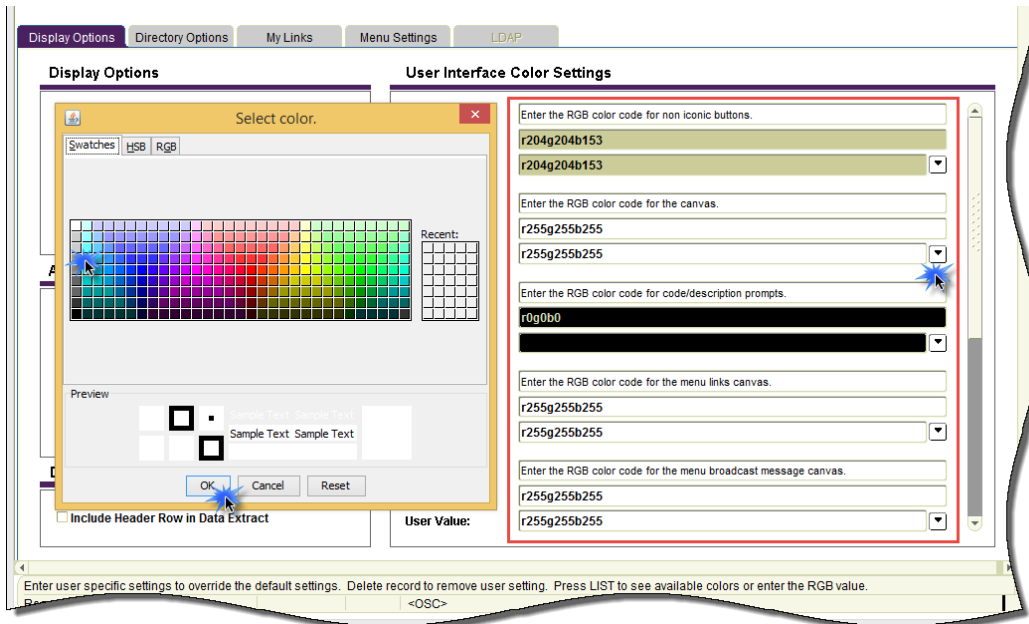
Adding Colors


Another way to personalize your Banner settings is to change the colors of the background, scroll bars and other interfaces.

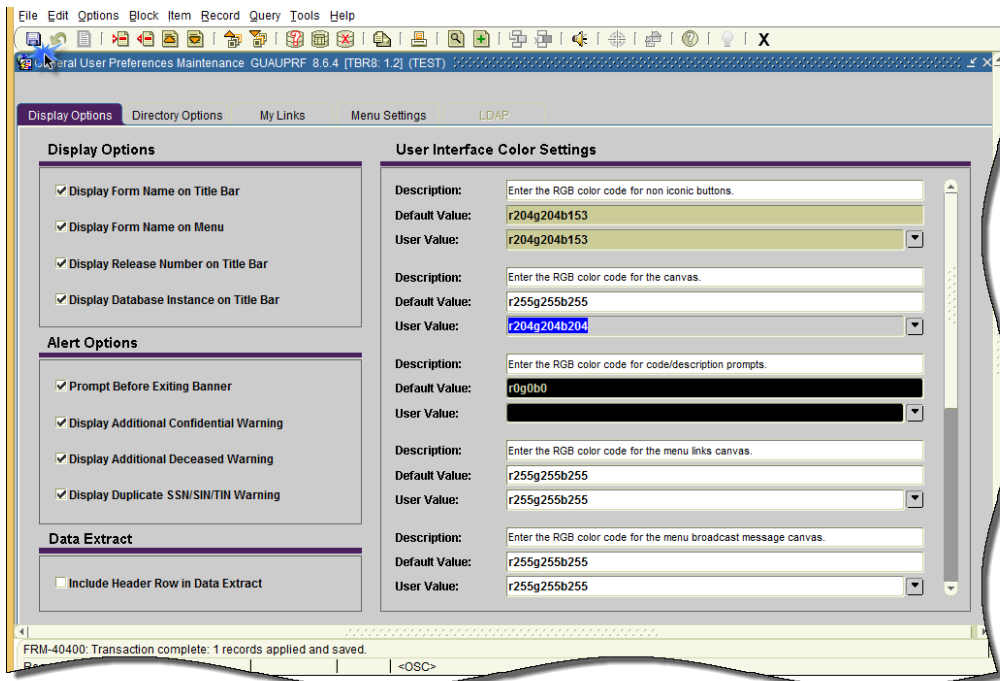



1. Click the **File Menu**
2. Click **Preferences**

Banner Tips and Tricks



3. Click the **Search Button**  for the user interface you want to change
4. The **Swatches Window** will open
5. Click the color you want to select
6. Click **OK**
7. Continue through the list as you like

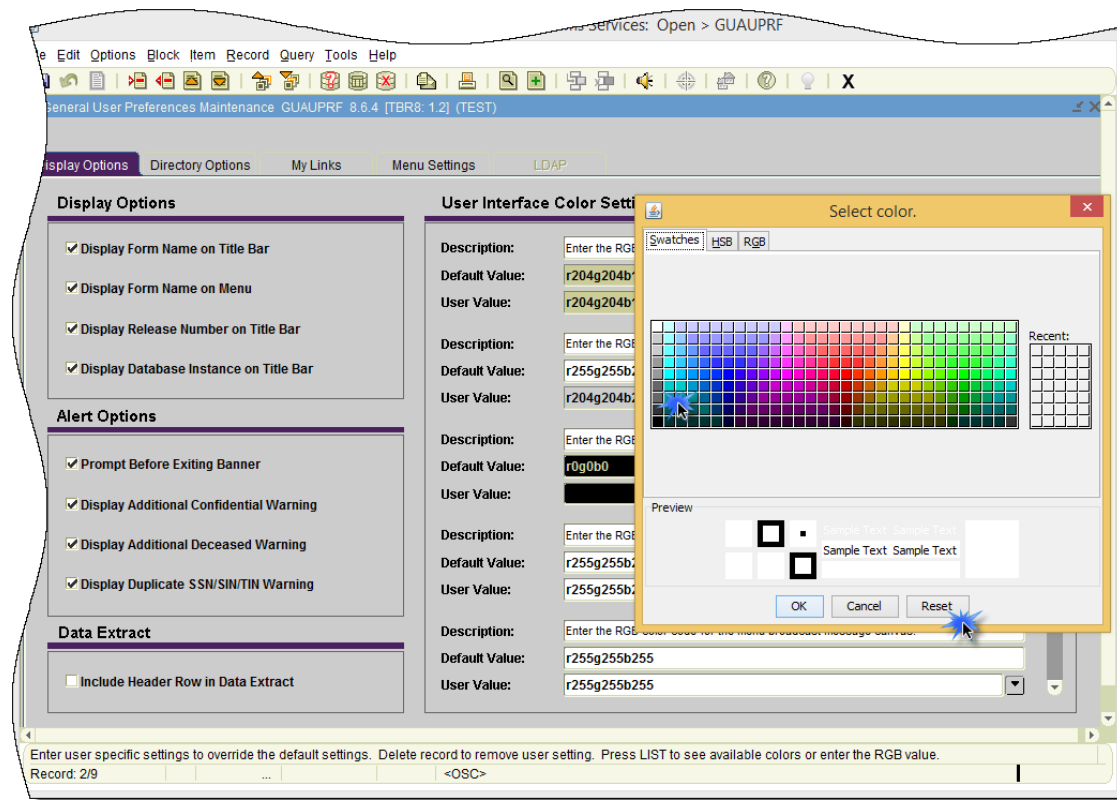



8. When you are finished changing items, **Save**  your changes
9. The colors will display

Banner Tips and Tricks


Changing/Resetting Colors

You have the ability to change any colors or reset colors that you have customized.



1. After selecting the **Preferences** option from the **File Menu** the window will open
2. Click the **Search Button**  for the user interface you want to change
3. The **Swatches Window** will open
4. To reset the color (back to the default), click the **Reset Button**

OR

5. Select another color from the color swatch
6. Click **OK**
7. When you are finished changing items, **Save**  your changes
8. The colors will reset or the new colors will display

Searching in Banner

This section will go over different types of searches in Banner.

General Search (GUISRCH)

The General Search form in Banner is a form you can use to find someone by their Email address or Phone Number.

ID	First Name	Middle Name	Last Name	Birth Date
CAMP	CAMP			27-SEP-

1. Enter the E-mail address or Phone Number in the Key Block
2. Next Block
3. Matching results will display
4. Double-click in the ID Field for the record you want

Banner Tips and Tricks


The screenshot shows the Oracle Fusion Middleware Forms Services interface for SPAIDEN. 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 browser address bar shows "General Person Identification SPAIDEN 8.5.3.1 (TEST)". The form has a "Generate ID" button. Below the menu bar are tabs for "Current Identification", "Alternate Identification", "Address", "Telephone", "Biographical", "E-mail", "Emergency Contact", and "Additional Identification". The "Current Identification" tab is active, showing fields for "ID:" and "Name Type:". The form is divided into two main sections: "Person" and "Non-Person". The "Person" section includes fields for "Last Name:", "First Name:", "Middle Name:", "Prefix:", "Suffix:", "Preferred First Name:", and "Full Legal Name:". There is an "Override Name Parse" checkbox. The "Non-Person" section has a "Name:" field. To the right of these sections are "ID and Name Source" and "Original Creation" sections, each with "User:" and "Date:" fields. At the bottom, a status bar contains the text: "ID number, LIST for person, COUNT HITS for non-person, DUP ITEM to generate ID, DUPLICATE RECORD for Alternate ID look-up." and a "<OSC>" button.

5. Open the form you want to view
6. The T-Number will automatically populate

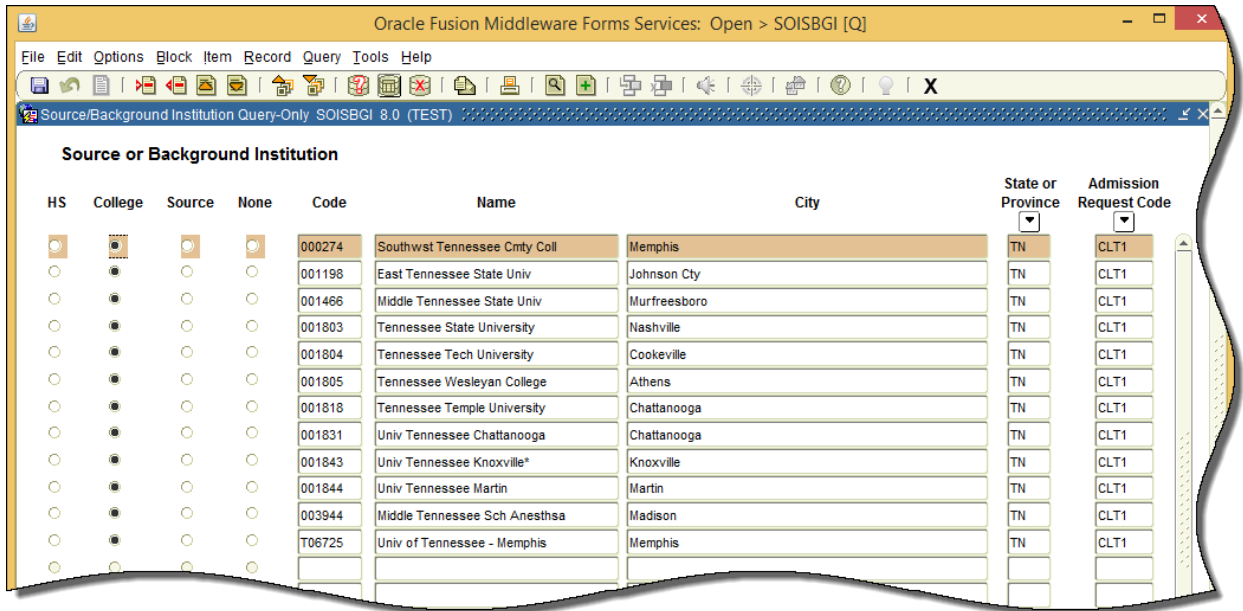
Reducing Your Search Results

You can reduce your search results in Banner using the wildcard (%).

The screenshot shows the Oracle Fusion Middleware Forms Services interface for SOISBGI. The window title is "Oracle Fusion Middleware Forms Services: Open > SOISBGI [Q]". The menu bar includes File, Edit, Options, Block, Item, Record, Query, Tools, and Help. The browser address bar shows "Source/Background Institution Query-Only SOISBGI 8.0 (TEST)". The form is titled "Source or Background Institution" and displays a table with the following columns: "HS", "College", "Source", "None", "Code", "Name", "City", "State or Province", and "Admission Request Code". The "Name" column contains the text "%Tennessee%", which is highlighted with a red box. The table has several rows, each with radio buttons in the "HS", "College", "Source", and "None" columns and input fields for the other columns. The "State or Province" and "Admission Request Code" columns have dropdown menus.

1. Enter your search criteria
2. Execute your query (F8 or )

Banner Tips and Tricks



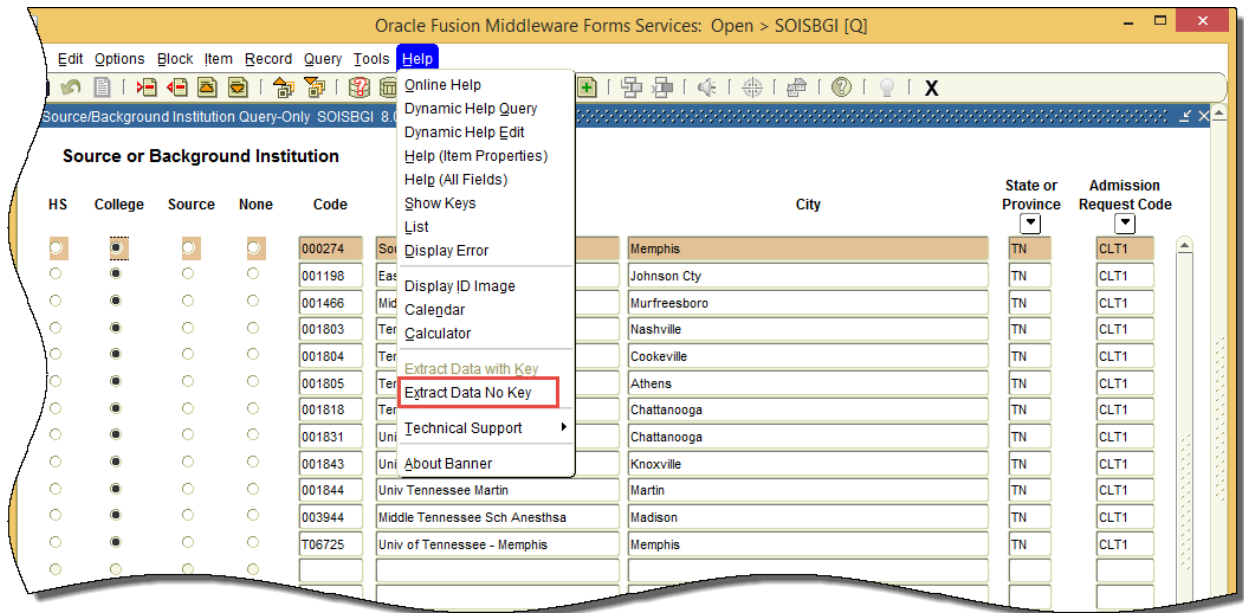
The screenshot shows a web browser window titled "Oracle Fusion Middleware Forms Services: Open > SOISBGI [Q]". The browser address bar displays "Source/Background Institution Query-Only SOISBGI 8.0 (TEST)". The main content area is titled "Source or Background Institution" and contains a table with the following columns: HS, College, Source, None, Code, Name, City, State or Province, and Admission Request Code. The table lists various institutions, with the first row highlighted in orange. The "HS" column has a radio button selected for the first row. The "College" column has a radio button selected for the first row. The "Source" column has a radio button selected for the first row. The "None" column has a radio button selected for the first row. The "Code" column contains values like 000274, 001198, 001466, 001803, 001804, 001805, 001818, 001831, 001843, 001844, 003944, and T06725. The "Name" column contains institution names such as "Southwt Tennessee Cmty Coll", "East Tennessee State Univ", "Middle Tennessee State Univ", "Tennessee State University", "Tennessee Tech University", "Tennessee Wesleyan College", "Tennessee Temple University", "Univ Tennessee Chattanooga", "Univ Tennessee Knoxville*", "Univ Tennessee Martin", "Middle Tennessee Sch Anesthsa", and "Univ of Tennessee - Memphis". The "City" column contains city names like "Memphis", "Johnson Cty", "Murfreesboro", "Nashville", "Cookeville", "Athens", "Chattanooga", "Chattanooga", "Knoxville", "Martin", "Madison", and "Memphis". The "State or Province" column contains "TN" for all rows. The "Admission Request Code" column contains "CLT1" for all rows.

HS	College	Source	None	Code	Name	City	State or Province	Admission Request Code
<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	000274	Southwt Tennessee Cmty Coll	Memphis	TN	CLT1
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	001198	East Tennessee State Univ	Johnson Cty	TN	CLT1
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	001466	Middle Tennessee State Univ	Murfreesboro	TN	CLT1
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	001803	Tennessee State University	Nashville	TN	CLT1
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	001804	Tennessee Tech University	Cookeville	TN	CLT1
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	001805	Tennessee Wesleyan College	Athens	TN	CLT1
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	001818	Tennessee Temple University	Chattanooga	TN	CLT1
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	001831	Univ Tennessee Chattanooga	Chattanooga	TN	CLT1
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	001843	Univ Tennessee Knoxville*	Knoxville	TN	CLT1
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	001844	Univ Tennessee Martin	Martin	TN	CLT1
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	003944	Middle Tennessee Sch Anesthsa	Madison	TN	CLT1
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	T06725	Univ of Tennessee - Memphis	Memphis	TN	CLT1
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>					
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>					

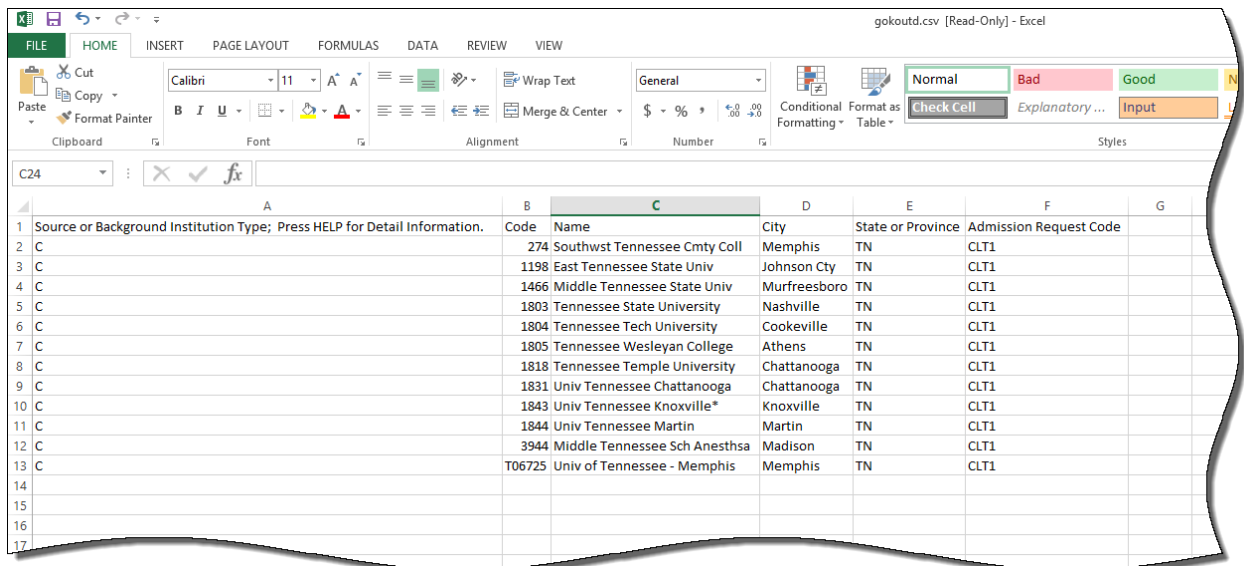
3. Your results will display

Banner Tips and Tricks

Extracting Results into Excel



1. Select **Help->Extract Data No Key**
2. Follow the prompts (it may take a few minutes for your sheet to open)



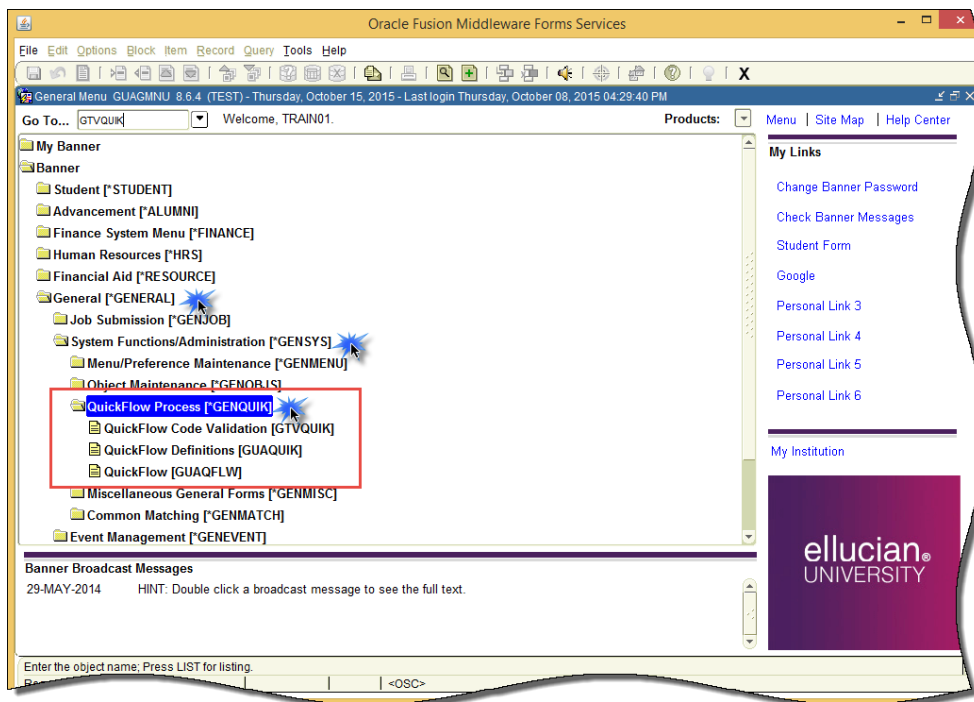
3. Your spreadsheet will open

QuickFlows

If there is a process that you do in Banner on a regular basis, you can set up a QuickFlow. A QuickFlow is a function in Banner that will take you to a series of pre-defined forms in the order that you design. QuickFlows are simple to create and even easier to use.

You can access the QuickFlow menu through the hierarchical tree structure menu (General-->System Functions/Administration-->QuickFlow Process) or by entering the form names into the **Go To field**

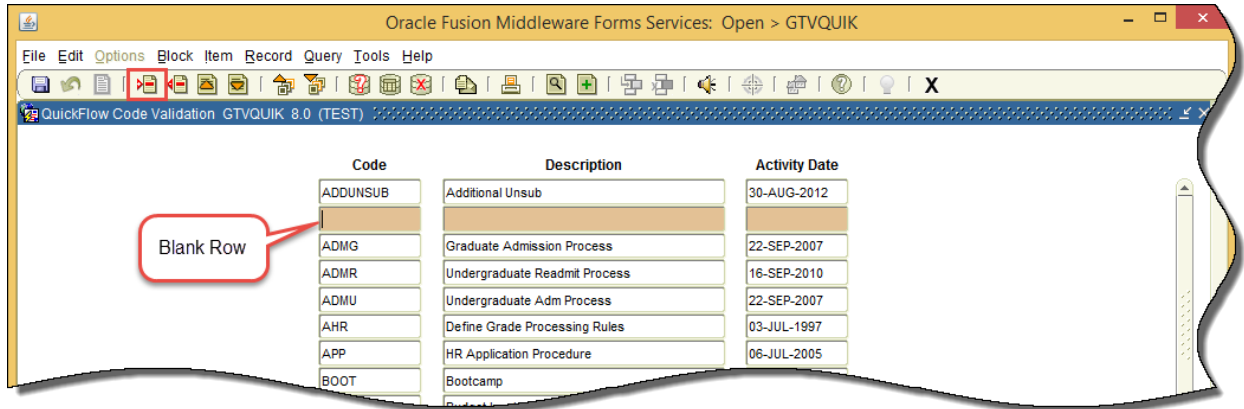
Go To...




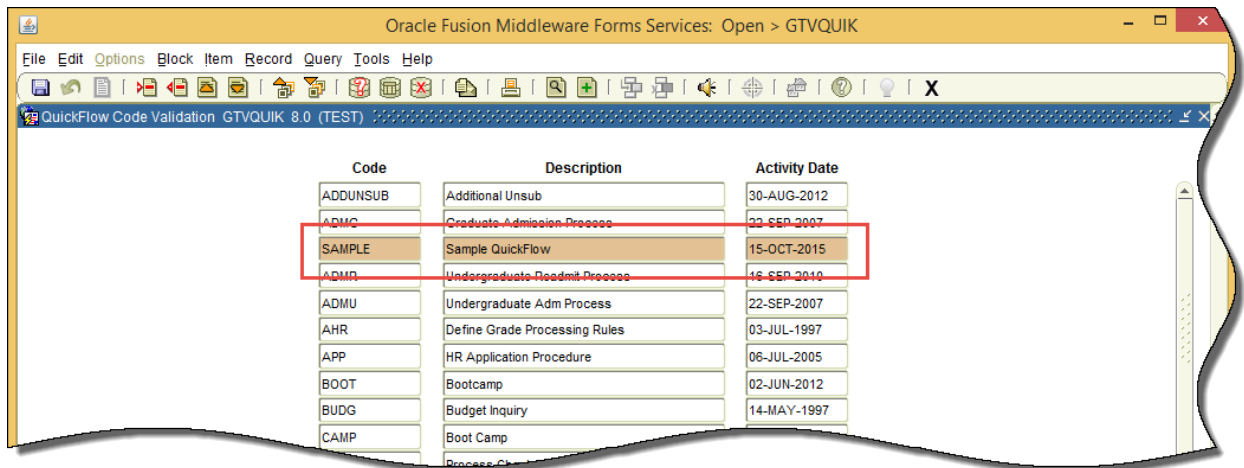
Banner Tips and Tricks



GTVQUIK - Add Your QuickFlow to the Validation Table

Your first step is to name and add your QuickFlow to the validation table.



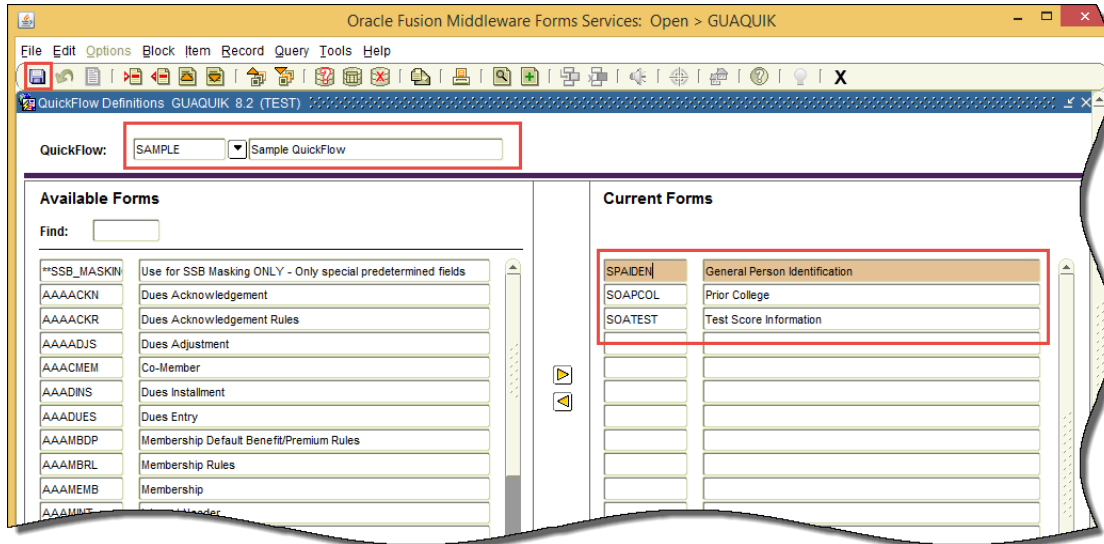
1. Open **GTVQUIK – QuickFlow Code Validation**
2. Click the **Insert Record** icon 
 - a. A blank row will be inserted




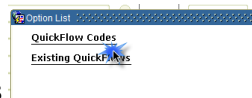
3. Enter the **Code**
4. Enter the **Description**
5. Save 
6. Close the form 


GUAQUIK – Define/Create Your QuickFlow

Your next step is to define your QuickFlow, meaning adding the forms to your QuickFlow (in the order you want the forms to open).



1. Open GUAQUIK
2. Enter your QuickFlow name in the Key Block
 - a. If you do not know the name of your QuickFlow you can search for it by selecting the **Search button** 

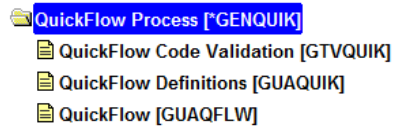


- b. Select **QuickFlow Codes**
3. **Next Block**
4. Enter the forms that will be in your QuickFlow *in the order that you want the QuickFlow to run* in the **Current Forms block** located on the right side of the form
5. Save 

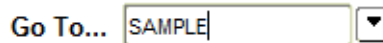
GUAQFLW – Launching Your QuickFlow

There are several ways to launch your QuickFlow.

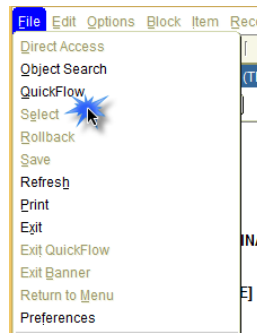
1. Click through the Hierarchical Tree Menu Structure Canvas and select **QuickFlow (GUAQFLW)***



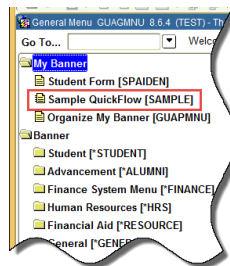
2. Enter the QuickFlow name in the **Go To Field**



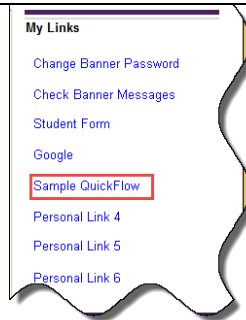
3. Go to **File→QuickFlow***



4. Add the QuickFlow to **My Banner**

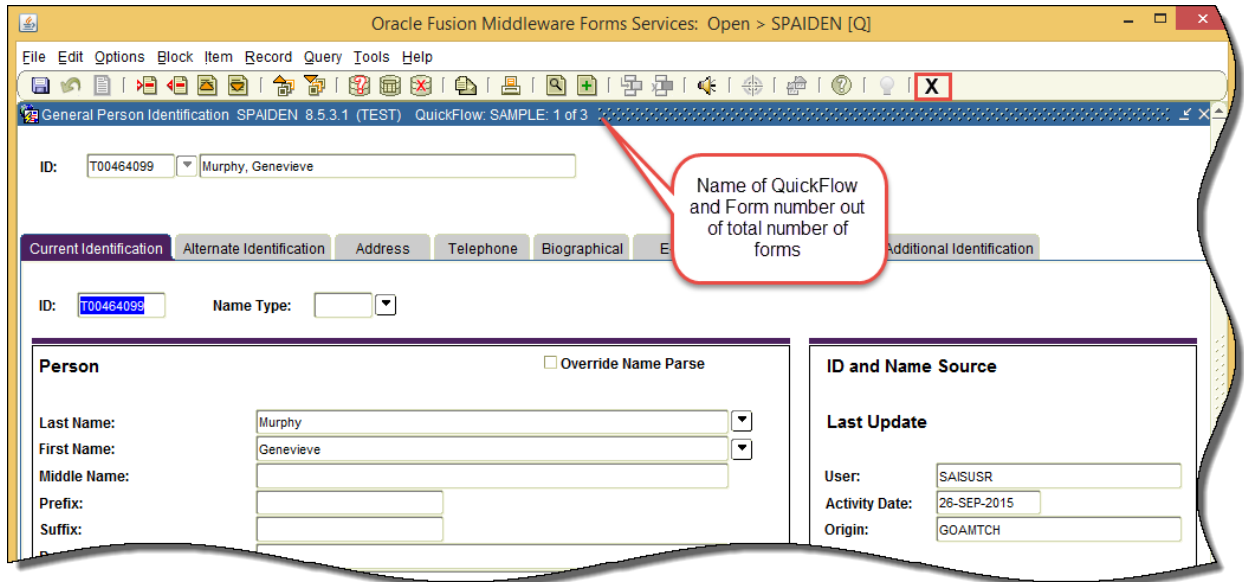


5. Add the QuickFlow to **Personal Links**



*If you select this method, you will have the ability to search and automatically relaunch for your QuickFlow. See [Searching for an Existing QuickFlow](#) below for instructions.

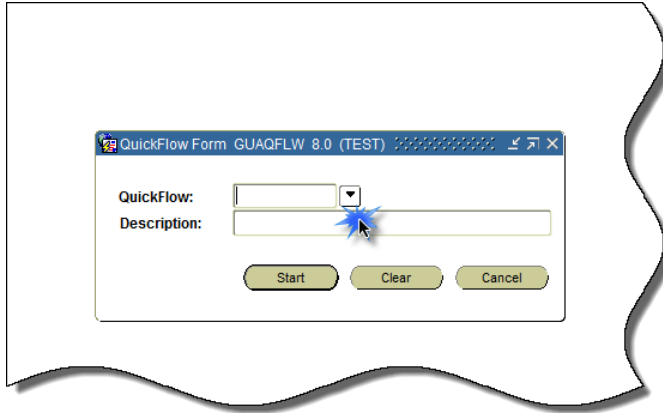
Banner Tips and Tricks




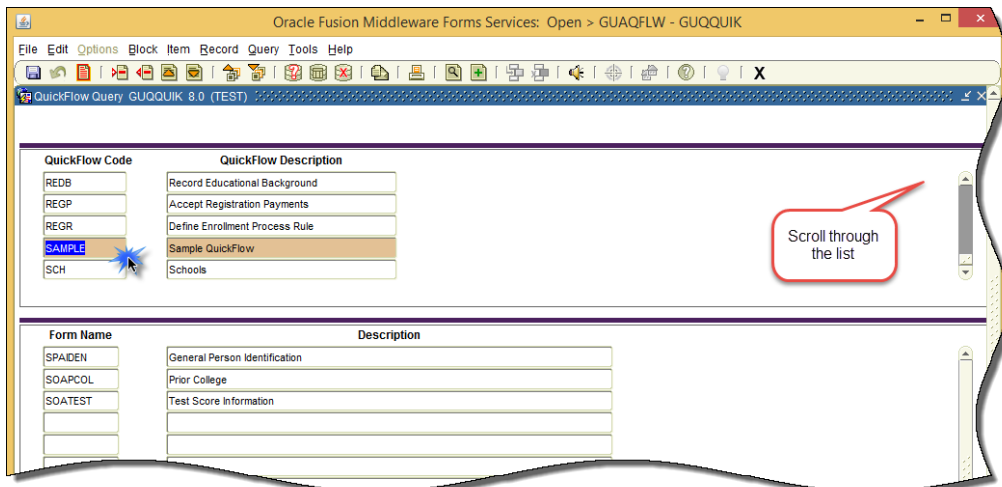
1. The first form in your QuickFlow will open
 - a. Notice the name and form number out of total number of forms in QuickFlow in the Title Bar
2. Perform the task
 - a. Be sure to save you work if you make any changes
3. **Close X** the form
4. The next form in your QuickFlow will open
5. Continue through the QuickFlow until you have gone through all the forms

GUAQFLW – QuickFlow Form (Searching for an Existing QuickFlow)

The QuickFlow functionality allows you to search for a QuickFlow by going to File→QuickFlow or using the form GUAQFLW – QuickFlow. The benefit to opening a QuickFlow with these two options is that when you finish with your QuickFlow, you have to option to automatically relaunch it.

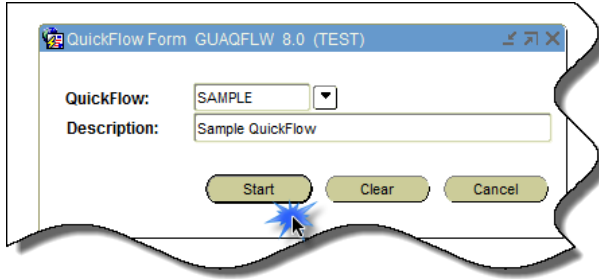


1. Open GUAQFLW – QuickFlow
2. Click the **Search Icon** 



3. GUQQUIK – QuickFlow Query Form will open
4. Scroll through the QuickFlow codes located on the top of the form
5. Double click on the QuickFlow you want to launch

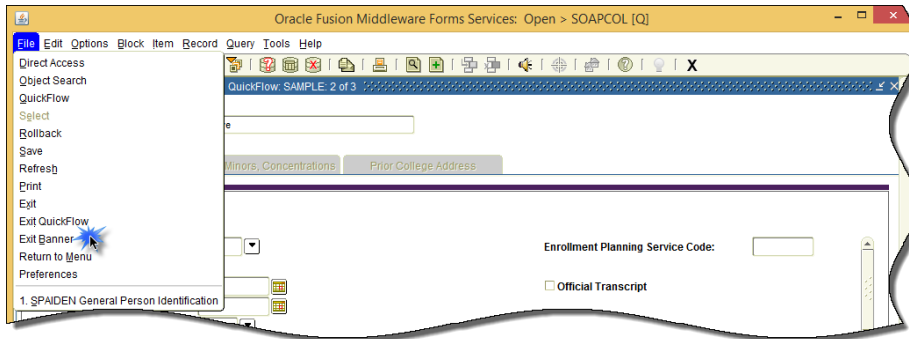
Banner Tips and Tricks



6. The code will populate in the QuickFlow field
7. Click **Start**
8. Your QuickFlow will launch
 - a. When you close out of the last form of your QuickFlow, GUAQFLW will open
 - i. Click **Start** to launch the QuickFlow again
 - ii. Click **Cancel** to exit the QuickFlow

Exit QuickFlow

If you need to exit your QuickFlow before you have gone through all the forms you can do that by going to **File**→**Exit QuickFlow**. *The QuickFlow will not remember the record or the form that you were in when you relaunch the process.*



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