

# Banner Navigation And Course Schedule Training

Records and Registration Office of Enrollment Management

# What is Banner?

Banner Student brings together administrative and academic functions to make it easier to manage data while giving students and faculty secure online access to the information they need. This is a product of SunGard Higher Education It may be accessed two different ways.

**INB** – Internet Native Banner is the database where student information is entered.

SSB – Self Service Banner (myTSU) used by students, advisors, staff, and faculty.

Changes made in myTSU update INB and vice-versa. Internet Explorer will be the browser of choice at TSU.

Information from Banner Student training documents and resources has been extracted in an effort to offer a concise overview of navigating in Banner

### **Logging into Internet Native Banner (INB)**

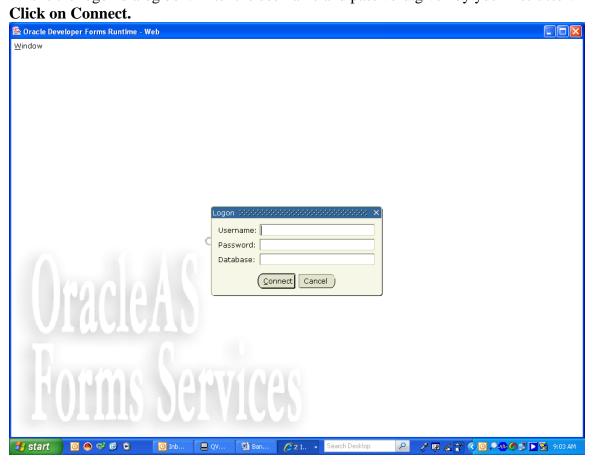
Access TSU homepage Go to: <a href="http://phonon.tnstate.edu:7201">http://phonon.tnstate.edu:7201</a>

This is the login menu. You must select the correct Banner database to login successfully. Instructions on how to log into Banner will be given by your instructor.

This is the Login menu: Click on Internet Native Banner (INB)



This is the logon dialog box. Enter the username and password given by your instructor.



### Menu

Menu Structure

structure

The Main Menu provides an overview of the menus, forms, and jobs on Banner. Use the

Main Menu to navigate through Banner.



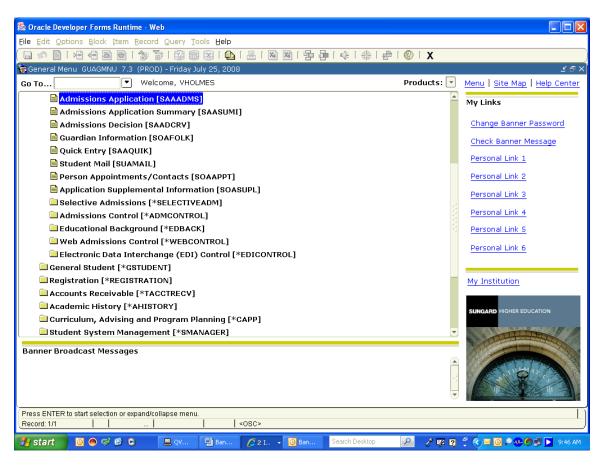
### **Menus - How to Access Forms**

- 1. Hierarchical menu
- 2. Go To... Field from Main Menu
- 3. Go To... Field accessed by <F5> function from a form
- 4. **Options** Menu from within a form
- 5. List of forms accessed during current Banner Session stored in the File Menu
- 6. Direct Access Form
- 7. Site Map

### **Hierarchical Menu**

When accessing forms from the Main Menu they are displayed as a hierarchy. You can expand and collapse content by clicking on the folders. If you do not have permission to access certain forms on a product menu then you will not see those forms. Therefore, you will only see the product menu and the submenus under it.

- 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

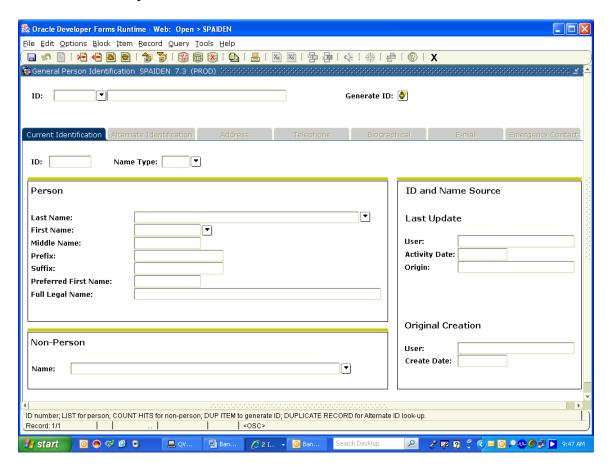


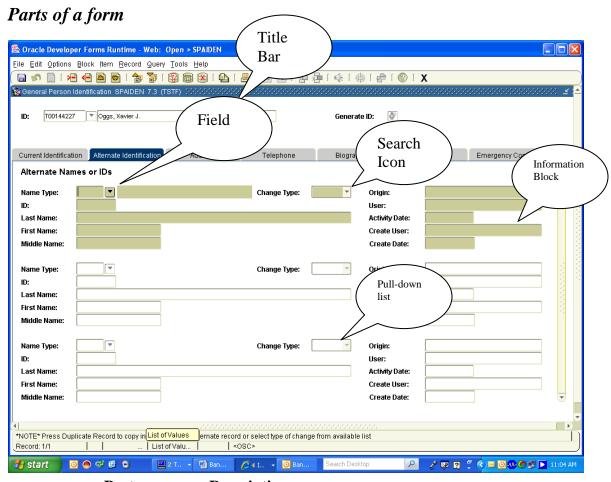
### Main Menu 'Go To...' Field or File/Direct Access

You can access a form from the **Go To...** field from the Main Menu, if you know the 7-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. Another option is to select Direct Access from the file menu.

# What is a form?

A form is an online document where you can enter and look up information in your database. It is comparable to a screen in SIS+.





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.

# What does the form name mean?

Every form has an abbreviated 7 character form name. Most of the time, forms are referred to by this 7 character form name.

• Position 1 – Identifies the Banner product owning the form, report, process or table.

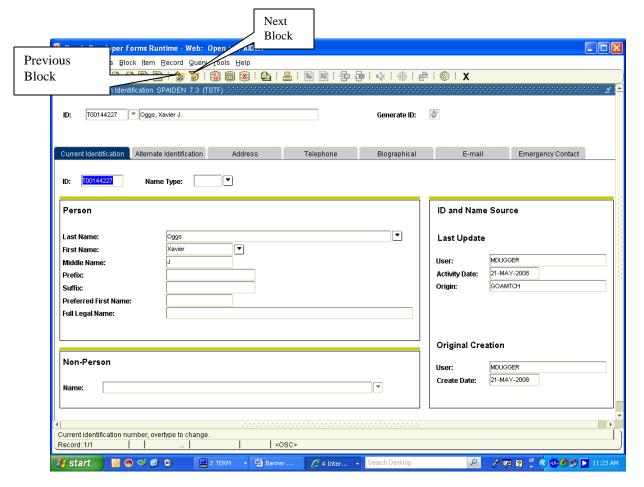
Fosition 1 – Identifies the Ballier product owning the form, report, process of table.	
$\circ$ G = General	
$\circ$ S = Student	
• Position 2 – Identifies the application module owning the form, report, process or table. I	s unique
to the product identified in position 1	
$\circ$ G = General	
S E = Event Management	
$\odot$ L = Letter Generation	
○ O= Overall	
$\circ$ S = Security	
$\odot$ T = Validation form/table	
$\circ$ S = Student	
$\odot$ A = Admissions	
$\odot$ C = Catalog	
© E = Support Services	
$\circ$ F = Registration/Fee Assessment	
$\odot$ G = General Student	
H = Grades/Academic History	
$\odot$ I = Faculty Load	
$\odot$ L = Location Management	
① O= Overall	
$\odot$ R = Recruiting	
$\odot$ S = Schedule	
$\odot$ T = Validation form/table	
• Position 3 – Identifies the type of form, report, process or table.	
○ A = Application	
○ B = Base Table	
○ I – Inquire	
$\circ$ P = Process	
o R – Rule Table, Repeating Table, Report or Process	
○ V = Validation	
○ M = Maintenance	
• Position 4, 5, 6, 7 – Identifies a unique four-character code for the form, report, process o	r table.
• ***IDEN = Identification	
• ***PINC = Position Incumbent	
• ***STDN = Student Relation	
deleta DATA G	Person
o ***PERS =	r erson

# **Form Components**

All Banner Forms are made up of three components: Records, Fields, and 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. There are two types of blocks, a Key Block and an Information Block.

- Key Block
  - o Where you start on a form
  - o Every form has a Key Block
  - o A unique code is entered such as an ID number, term code or document number.
  - o Lets Banner know what piece of information you want to retrieve
  - $\circ$  The rest of the information on the form will refer to the information that you enter on the Key Block.
- Information Block
  - o Section that contains related information to what was entered in the Key block
  - o A line may separate each Information block on the form



The Record Counter displays number of records viewed and the number of total records. 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.

# Wildcards (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.

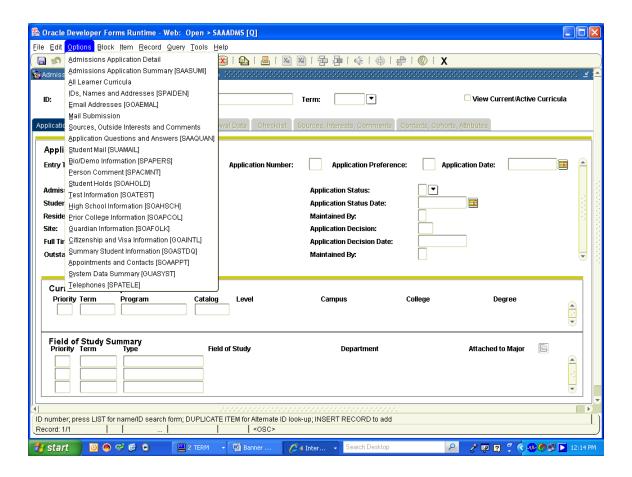
- % (percent sign) represents any number of characters
- \_ (underscore) represents one occurrence of a character

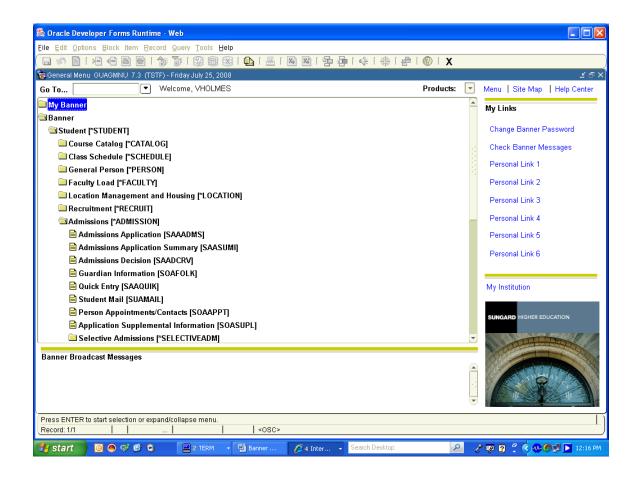
"ma" is used as an example. The wildcard symbols can be used with any combination of latter in any order.

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%

### **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.





# 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

## **Menu Bar Overview**

The menu bar is located at the top of the 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

The menu bar consists of several pull-down menus

# Pull-Down Menus

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

### File Menu

Option		lbar on	Key	board Shortcut	Purpose	
Direct Ac	ccess		F5	Accesses the Direct Acce	ess From – GUAPARM	
Object So	Object Search			Accesses the Ojbect Search Form – GUIOBJS to locate a form, job, or Quick Flow if you know part of its name, description, or type		
Quick Flo	ow		Displays the access a Quic		AQFLW) which is used to	
Select		1	Shift-F3	Returns you to the cal selected value into the fie	lling form and enters the eld that called the form	
Rollback	pack Shift-F7		Shift-F7	Action depends on what type of form is currently used.  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 filed on the form Query Returns you to the first enterable filed on the calling form		
Save			F10	Saves all changes entered since the last time you saved		
Refresh			Clears the m	essage line; redraws the screen		
Print			Prints the cur	rrent window; inputs the da	ate and time in the title bar	
Exit		Actions vary.  If selected from  Then you A form Exit that form The main menu Exit form Banner Query mode Cancel the query				
Exit Qu	Exit Quick Flow   Exit		Exits you f	From your Quick Flow		
Preferen	Preferences				ces Maintenance Form customize Banner for	

# **Edit Menu**

Option		lbar on	Ke	eyboard Shortcut	Purpose
Cut		Ctrl-X		Cuts selected text and places it o the clipboard	
Copy		Ctrl-C		Copies selected text and p	laces it on the clipboard
Paste	aste Ctrl-V		trl-V	Pastes text from the clocation	elipboard to the cursor
Edit		Displays t text	he editor window which is	used to enter and update	

### **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 from. 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.

### **Block Menu**

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

Option		lbar on		Keyboard Shortcut	Purpose
Previous Ctrl-F		Page Up	Moves cursor to the previo enterable field	us block that has at least one	
Next Ctrl-Page Down		Moves cursor to the next block that has at least one enterable field			
Clear			F7	Clears all information in that as Enter Query. Puts the for	e current block. Also known rm in Query Mode

### Item Menu

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

Option	Toolbar Icon		Key	board Shortcut	Purpose
Previous		Ş	Shift-Tab	Moves the cursor to the j	previous enterable field
Next			Tab Moves the cursor to the next enterable field		next enterable field
Clear				Does not remove in	current field on your nformation from any
Duplicate			previous re		ne same field in the to the new record. Used rd

# **Record Menu**

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

Option	Tooll Ico			Keyboard Shortcut	Purpose	
Previous		Up A	Arrow	Moves cursor to the enterab	le field in the previous record	
Next	Next		own row	Moves cursor to the first enterable field in the next re of the current block. If the cursor is in the last reco new record is created		
Scroll Up	)	Pag	ge Up	Scrolls up the list of repeati	ng records.	
Scroll Do	own	Page	Down	Scrolls down the list of repeating records.		
Clear	Clears Clears		Clears	all information from the disp	lay of the current record	
Remove		Shi	ft F6	Removes all information for the current record. When you save the record is permanently deleted		
Insert		]	F6	Inserts a new blank record in the existing records		
Duplicate	Duplicate F4		F4	Duplicates the content of all fields in a record and copies them into a new record		
Lock	user ca		user ca	rarily locks the contents of t n update it. Save, Rollback, then Exit rele	the record so no other Banner ases the lock.	

# Query Menu

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

Option	Tool Ico			Keyboard Shortcut	Purpose
Enter F7		F7	Puts the form into Query mode so you can enter search criteria to see information already in the database		
Execute F8		F8	Searches the database and displays records that match your search criteria		
Last Crite	Last Criteria F7 t		twice	Enters the criteria from you when you are in Query Moo	our last search (enabled only de)
Cancel Ct		rl-Q	Cancels the Query and takes the form out of Query Mode		
			the number of records that s that number on the Auto Hi	match the search criteria and int Line	

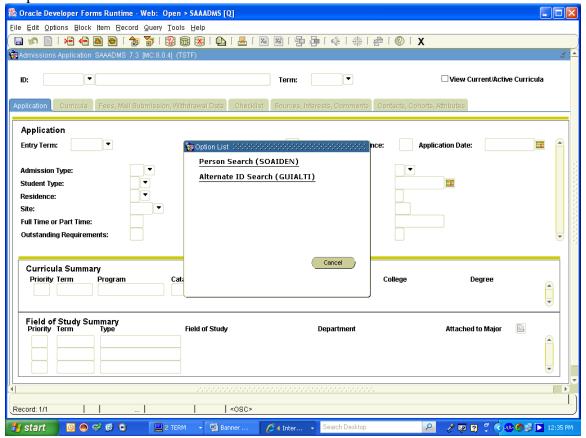
# Quick Reference Guide to Banner Keyboard Commands



Function	Menu Option	Keyboard
Next Record	Record/Next	<b>↓</b>
Previous Record	Record/Previous	<b>↑</b>
Delete Record	Record/Remove	Shift+[F6]
Insert Record	Record/Insert	[F6]
Next Block	Block/Next	Ctrl+Page Down
Previous Block	Block/Previous	Ctrl+Page Up
Enter Query	Query/Enter	[F7]
Execute Query	Query/Execute	[F8]
Cancel Query	Query/Cancel	Ctrl+Q
Rollback	File/Rollback	Shift+[F7]
Save (Commit)	File/Save	[F10]
Next Field	Item/Next	Tab
Previous Field	Item/Previous	Shift+Tab
Exit	File/Exit	Ctrl+Q

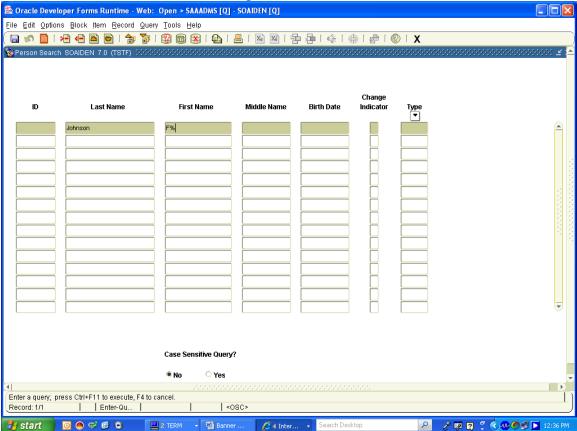
# **Guidelines for Searching in Banner**

In the ID field in the Key Block of a form, press F4 or click on down arrow for Option List to access Person Search (SOAIDEN) or Alternate ID Search (GUIALTI) See snapshot below.



# **SOAIDEN (Person Search Form)**

If you select SOAIDEN, enter Last Name and in the First Name you may enter the first letter with the wildcard (%). For example:



You may search or execute this query by:

- 1. Press F8
- 2. From the toolbar Query/Execute
- 3. Select the Execute Query icon between the question mark and X on the toolbar.

The format for all person searches is: Last name, First Name Examples:

- 1. Smith, J% --This will return all ID's with last names of "Smith" and first names beginning with "J"
- 2. Mag%, P% -- This will return all ID's with last names staring with "Mag" and first names starting with "P"
- 3. %, Barbara -- This will return all ID's with the first name "Barbara"
- 4. M%vish -- This will return all ID's with the name having a first initial "M", ending with "vish" and having anything in between
- 5. Smith, Carol -- This will return all ID's with the last name of "Smith" and the first name of "Carol".

To clear a field when searching, select Query/Enter.

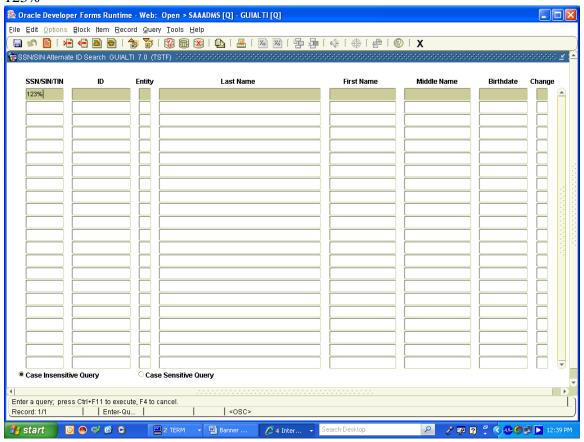
### **Choose GUIALTI to search by Alternate ID (Social Security Number)**

The first field is the social security number. Enter the social security number without hyphens.

Search or execute this query by:

- 1. Press F8
- 2. From the toolbar Execute/Query
- 3. Select the Execute Query icon between the question mark and X on the toolbar.

Enter part of the social security number to search using the wildcard %. For example, 123%



# **Search by Partial Name**

This is the Preferred method as there is less likelihood of missing an already existing record. Perform partial name search following any search by SSN that does not yield results. From the Key block of a form, select backspace key to clear field. Another way to clear a field is to select Item/Clear from the tool bar.

Tab to the name field, enter a partial name with the wildcard %. Enter the first three or four letters of the last name with %, a comma, and a space. Then enter the first letter of the first name with a %. Enter. If you use the full last name and the first letter of the first name and this returns no results, re-search using less specific criteria.

If one match is found, the ID and name are returned to the form.

If more than one match is found, the ID and Name Extended Search window appears

# Exercises to practice Navigation and Searching for Student Information

To use the menus described below, type the letters listed under the Menu column in the Direct Access box on the first screen of Banner. Terms are coded as follows: 200810 = Spring 2008; 200850 = Summer 2008; 200880 = Fall 2008

If you don't know the student's M#, click on the ID button and the Person Search Form will appear on the screen. Tab over to the Last Name column. Key in the student's last name, Tab and key in the student's first name (if you know it) or part of it. For example, Smith, Jo%. The % sign is a wildcard for searching in Banner Then press the F8 key. If several names appear, arrow down to the correct one, and click on the Select button at the bottom of the screen.

Information Needed	Menu	Instructions
Academic History	SHACRSE	Enter T#, and key in term (for example, 200810) or leave term blank. Next Block (or Ctrl+Page Down). Rollback (or Shift+[F7]) to enter another name. For term 200810 or 200850, IP grade means student is enrolled (In Progress).
GPA	SHATERM	Enter T# and level, UG for undergraduate or GR for graduate, and leave Term blank to see a cumulative academic history record; Next Block (or Ctrl+Page Down) to see overall GPA. Rollback (or Shift+[F7]) to enter another name.
Admissions Information	SAAADMS	Enter T#, Next Block (or Ctrl+Page Down). You'll see all the activity in the student's admissions file: program, entrance status, etc. Rollback (or Shift+[F7]) to enter another name.
General Student Information	SGASTDN	Enter T#, Next Block (or Ctrl+Page Down). You'll see all the activity in the student's record: program, classification, residency, veteran information, academic standing, graduation status, etc. Rollback (or Shift+[F7]) to enter another name.
Student Address	SPAIDEN	Enter T#, Next Block (or Ctrl+Page Down). To see the student's current address and telephone number, click on the Address button at the bottom of the screen. Rollback (or Shift+[F7]) to enter another name.

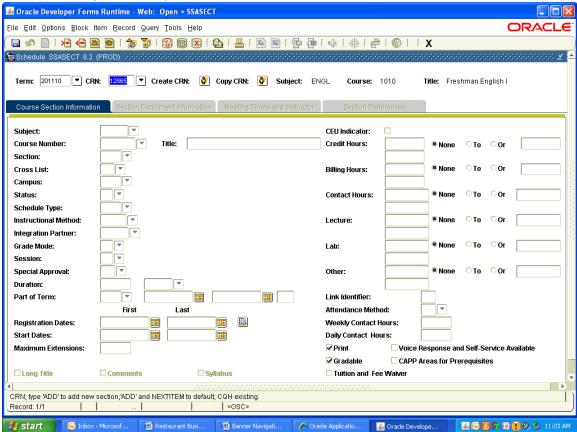
Prior College Information	SOAPCOL	Enter T#, to see from where and if the student graduated, when, and if we have an official transcript on file. Rollback (or Shift+[F7]) to enter another name.		
High School Information	SOAHSCH	Enter T#, Next Block (or Ctrl+Page Down) to see from where and if the student graduated, when, and if we have an official transcript on file. Rollback (or Shift+[F7]) to enter another name.		
Student Address	SPAIDEN	Enter T#, Next Block (or Ctrl+Page Down). To see the student's current address and telephone number, click on the Address button at the bottom of the screen. Rollback (or Shift+[F7]) to enter another name.		
Registration by Term	SFAREGQ	Enter term (for example, 200780) and M#, Next Block (or Ctrl+Page Down). Rollback (or Shift+[F7]) to enter another name.		
Transfer Credit Information	SHATRNS	Enter T#. Enter Transfer Inst. No. 01., Attendance Period No. 01, Next Block (or Ctrl+Page Down) until you see screen with transfer credits listed. Rollback (or Shift+[F7]) to enter another name.		
Prescribed Course & Academic Deficiencies	SZAADEF	Enter T#, Next Block (or Ctrl+Page Down), view academic deficiencies (A89) requirements and prescribed course requirements.		
PIN/code entered to allow student registration on myTSU	SPAAPIN	Enter term (200780) then tab. Enter T#, enter. Next Block (or Ctrl+Page Down).		
Registration History	SFARHST	Enter T#, Next Block (or Ctrl+Page Down). Shows term, course, and grade. Rollback (or Shift+[F7]) to enter another name.		
General Student Summary	SGASTDQ	Enter T#, Next Block (or Ctrl+Page Down) to view academic standing and progress evaluation by term, curricula summary, and field of study summary.		
Issue Permits & Overrides	SFASRPO	Enter T#, enter. Enter term (200780) then tab. Next Block (or Ctrl+Page Down).		

# **COURSE SCHEDULING**

The goal of this section is to provide you with the knowledge and practice to setup and maintain a schedule of classes.

The Schedule Form (SSASECT) is used to build and maintain the schedule of classes according to the definitions and restrictions created in the Course Catalog. A course catalog record must exist prior to the creation of sections for a particular course.

### Banner Form (SSASECT)



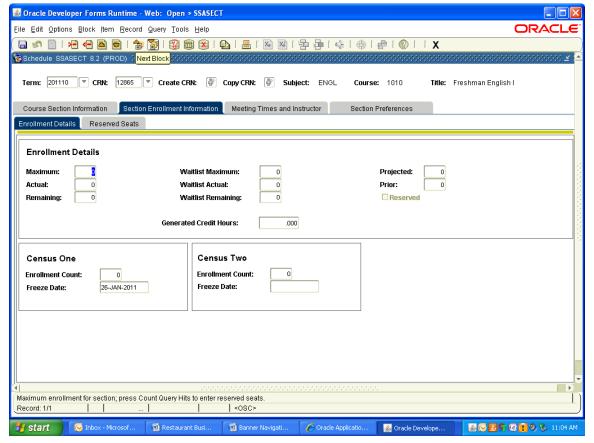
Follow these steps to complete the process of scheduling a section of a course.

Step	Action
1	Access the Schedule Form (SSASECT)
2	Enter the term in the <b>Term</b> field
3	Enter <b>ADD</b> in the <b>CRN</b> field
4	Perform a Next Block function
5	Enter the Discipline (i.e. ENGL) hit enter
6	Enter the Course Number, hit enter (the title of the course will populate)
7	Continue by entering the following information

Field	Enter	Value
Section	01	01
Campus	45M	Main
Status	A	Active
Schedule Type	LEC	Lecture
Part of Term	1	1 Must hit enter and SAVE

To assign **Course Limit**: click Section Enrollment Information tab and enter enrollment limit in the Enrollment Detail block. Click the Save icon. Note: A **CRN** has been assigned to the sections and you are returned to the form.

### Banner Form



### **Assigning a Meeting Time and Instructor:**

To assign meeting times: click **Meeting Times and Instructor tab**.

From the Meeting times detail section

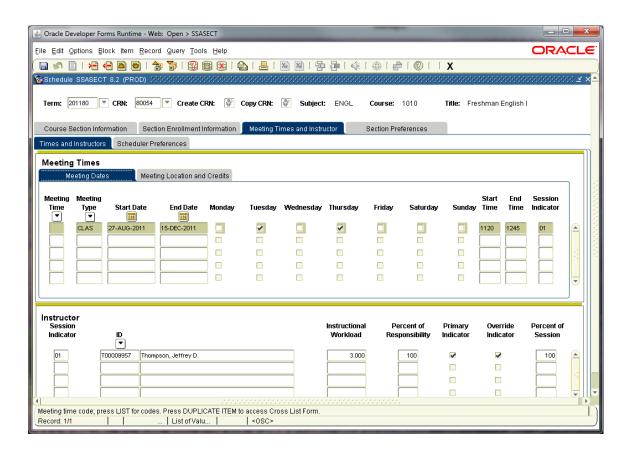
- 1. Hit enter/tab twice to populate the Meeting Type, Start Date and End Date
- 2. Check meeting days
- 3. Enter Start Time and End Time (Time must be enter in military time)
- 4. Click the Save ion.

To assign instructors next block to the instructor detail block

- 1. Enter instructors T# and click enter
- 2. Click Save (if you receive a conflict error, you must populate the override indicator)

NOTE: You must have a meeting time to assign an instructor.

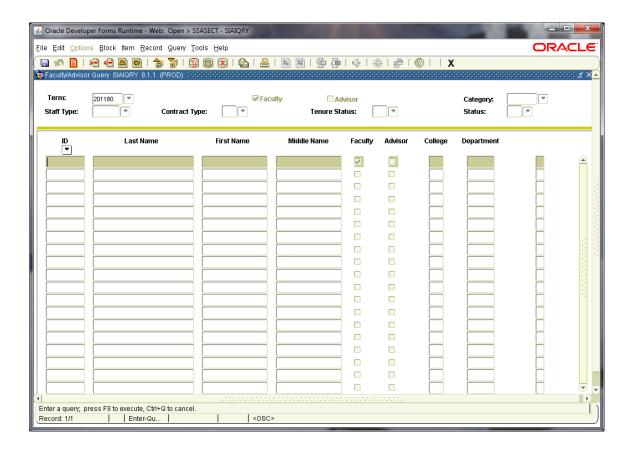
If the meeting time is TBA populate the Meeting Type, Start Date and End Date.



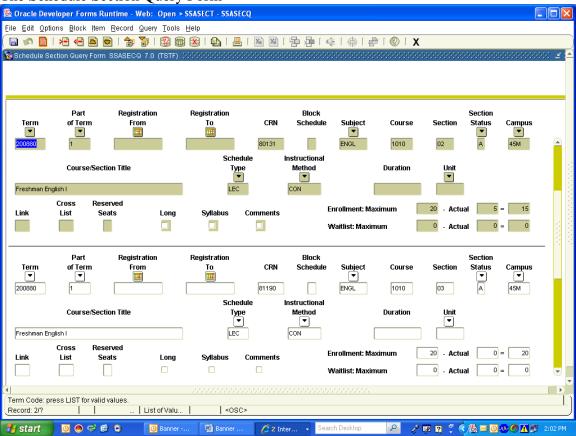
If you do not have the T# you must use the Faculty/Advisor Query Form, to locate the faculty member created in the Faculty Load module. An instructor cannot be assigned to a section of a course until HR has assigned in Banner.

### **Locating an Instructor**

- 1. Click on Lov button under ID in the Instructor session
- 2. Click the query icon
- 3. Scroll listing to locate instructor
- 4. Double click on instructor and it will populate the instructor detail block
- 5. Click Save icon.
- 6. Roll Back



The Schedule Section Query Form



# 24 HOUR CLOCK MILITARY TIME

Banner requires the use of a 24-hour clock to input class meeting times. When the class schedule information is displayed online, via myTU, Banner converts the 24-clock time into 12-hour (am/pm) standard clock times.

1:00pm	=	13:00	7:00pm	=	19:00
2:00pm	=	14:00	8::00pm	=	20:00
3:00pm	=	15:00	9:00pm	=	21:00
4:00pm	=	16:00	10:00pm	=	22:00
5:00pm	=	17:00	11:00pm	=	23:00
6:00pm	=	18:00	12:00am	=	24:00

### Main Campus Buildings

