

REED COLLEGE

User Guide General Navigation

Prepared by Karen L. King

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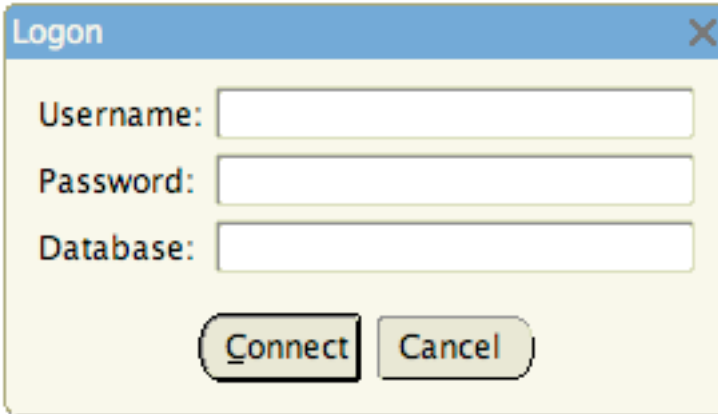
HELP!58

INTRODUCTION

The purpose of this document is to familiarize users of Reed's administrative information system with an overview of basic techniques for getting around the system. Specific functional implementation of the system (e.g., Position Control, Accounts Receivable, Prospect Management, etc.) is *not* addressed here.

Log On

1. Click on the **Banner OSX** link from the Administrative Staff Applications web page (http://www.reed.edu/test/cms_test/staffapps/).
2. WAIT for the logon screen to appear.



3. Type in your username and password. You do not have to enter the name of the database. You can press **Tab** or click your mouse to move the cursor from one field to the next. The entries can be in upper or lower case.
4. Click on the **Connect** button or press **Return**.
5. This will display the General Menu form (GUAGMNU).
6. You will have 2 windows open after you have logged on. You must keep both windows open to keep your session active.

Log Out

1. Click the Exit icon **X** in the upper right hand corner of the screen (or **Ctrl-q**) to exit a form and again to close the session. This will close the main browser window.



NOTE: This document addresses Reed's adaptation of the Banner software system produced by Ellucian™. It resides on an Oracle database. Because of the generic nature of the instructions in this document the terms Banner, Banner 8, and system are used interchangeably.

Using the Mouse and Keyboard

You can perform most Banner functions with either a mouse or keyboard. Mouse and keyboard instructions are given only if they are distinctly different from each other. Two symbols appear throughout this document to indicate the different sets of instructions:



Mouse instructions



Keyboard instructions

Options Window

When you right-click anywhere on a form (except from within a field), the pop-up Option Window appears. It contains different options related to the form, such as functions you can perform and navigation options. You can also choose to add the form to your personal menu

What Is a Form?

A form is an online document where you can enter and look up information in the 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, windowpanes, dialog boxes, and alert boxes.

Windows

A window is a framed portion of a form. Just as some paper forms have multiple pages, some Banner forms have multiple windows. The first window in a form is called the main window and is identified by the form name. All other windows in the form have their own unique names.

More than one window can be open at the same time. The limits are determined by the amount of memory installed on your system. Not all windows are the same size, so you might see parts of more than one window at the same time.

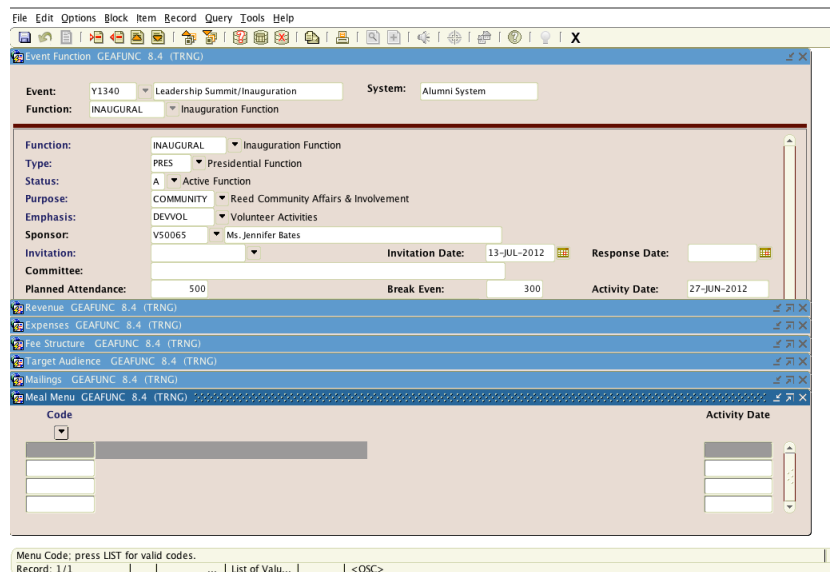
This form has two open windows (7 windows total):

Main Window →


Revenue Window →

Meal Menu Window →

The Meal Menu window is the active window, indicated by the highlighted title bar.



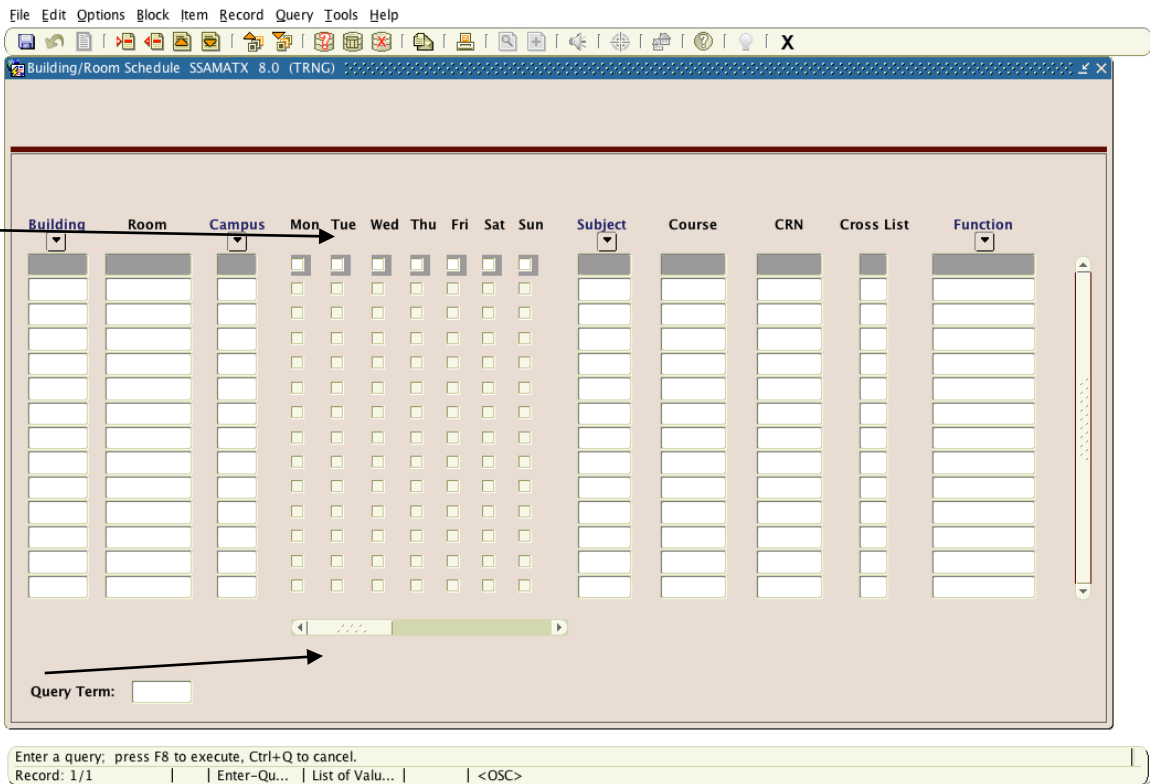
You can move a window by dragging its title bar to the new location. (You cannot move the top of the title bar above the screen.)

You can use the close button in the upper right corner of a window in Banner. .

The  button at the top of the form closes the form and all open windows associated with the form.

Windowpanes

A windowpane is an area within a window having more fields than can appear at one time. Solid line borders a pane. Use horizontal scroll bar at the bottom of windowpane to see remaining fields in pane.



The screenshot shows a software window titled "Building/Room Schedule SSAMATX 8.0 (TRNG)". The window contains a table with the following columns: Building, Room, Campus, Mon, Tue, Wed, Thu, Fri, Sat, Sun, Subject, Course, CRN, Cross List, and Function. The table is currently displaying only the first few columns, and a horizontal scroll bar is visible at the bottom of the table area. A vertical scroll bar is also present on the right side of the table. Below the table, there is a "Query Term:" label followed by an input field. At the bottom of the window, there is a status bar with the text "Enter a query; press F8 to execute, Ctrl+Q to cancel." and "Record: 1/1 | Enter-Qu... | List of Valu... | <OSC>".

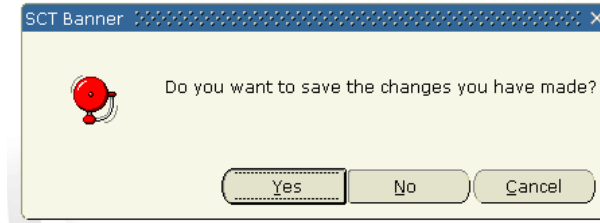
This is a windowpane.

A horizontal scroll bar always appears under a windowpane.

Dialog Boxes

A dialog box is a window that appears when you must choose from two or more responses. You must acknowledge a dialog box before you can do anything else on the form.

This dialog box has three possible responses.



To acknowledge a dialog box:



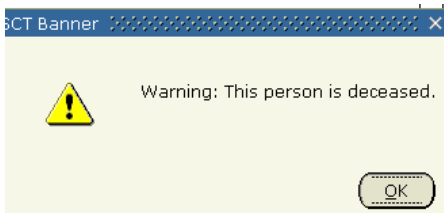
1. Click the button you want. Select the **Next Item** function to move to the button you want.



2. Press Enter or type Y for Yes, N for No or C for Cancel.

Alert Boxes

An alert box is a window that notifies you of a condition that may impact data. For example, this alert box may appear if you try to enter information for a deceased person:



An alert box always has one response.

You must acknowledge an alert box before you can do anything else on the form. The location of the cursor after you close the box depends on the alert box.

To acknowledge an alert box:

Click the OK button.



Press **Enter** or type O for OK.



TYPES OF FORMS

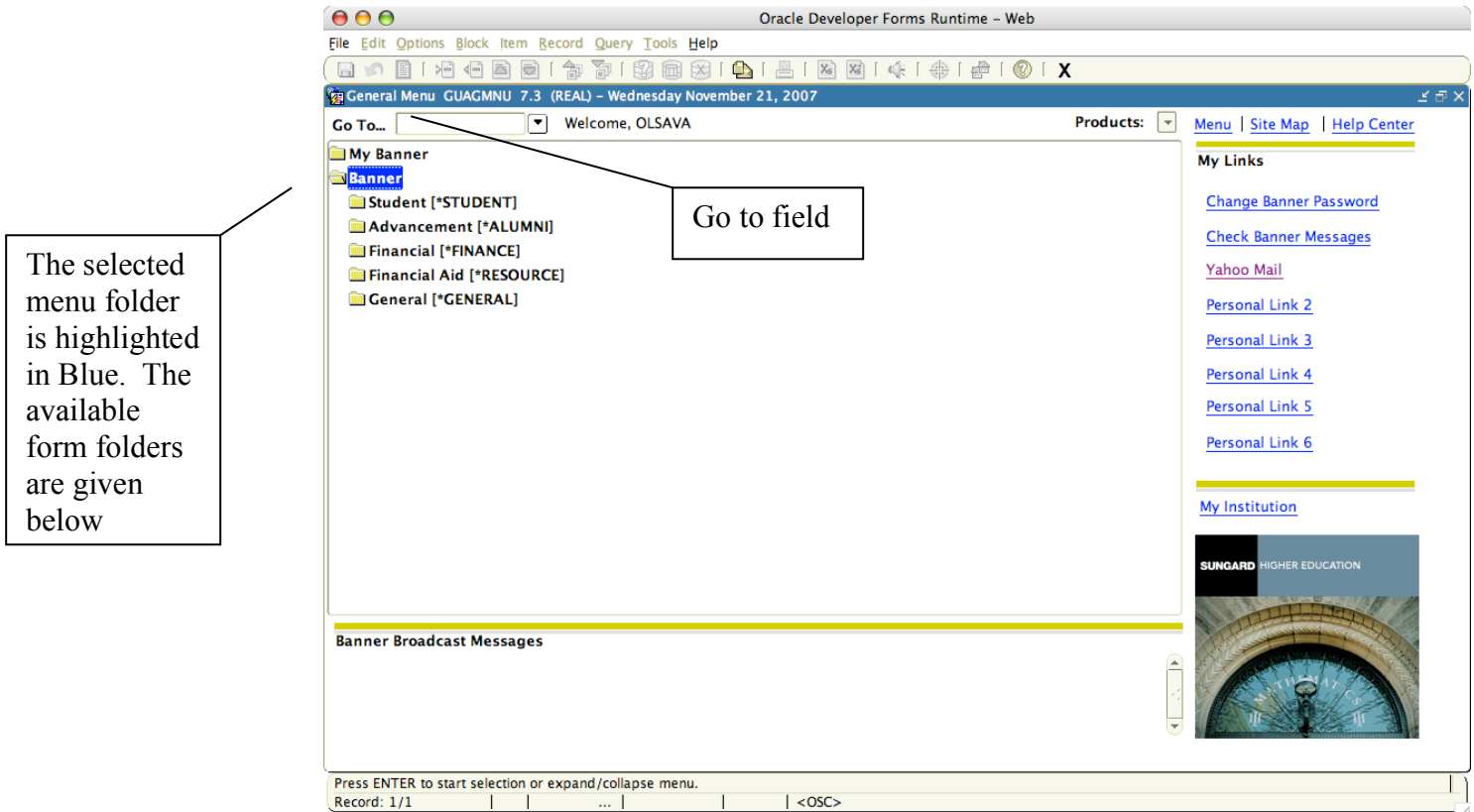
The Banner General System uses eight types of forms:

- | | |
|--------------------------|---|
| Main menu | Use this form to navigate through Banner. It provides an overview of the menus, forms, jobs, and QuickFlows in the system. |
| Application forms | Use these forms to enter, update, and query information. Most common form. |
| Validation forms | Use these forms to define values to enter in specific fields on application forms. When looking up a code or selecting List function, these values appear in List of Values window. |
| Rule forms | Use these forms to define the calculations and parameters that impact processing on other forms, reports, and jobs. |
| Control forms | Use these forms to define the processing rules for application and validation forms at the system level. |
| Query forms | Use these forms to look up existing information, often returning information to the calling form. You must access these forms from another form. You cannot access them directly from the main menu, with Direct Access, or with Object Search. |
| Inquiry forms | Use these forms to look up existing information, often returning information to the calling form. You can access these forms from the main menu, from another form, with Direct Access, or with Object Search. |

Main Menu

- When logging into Banner, you will be presented with the *General Menu* form. This menu is the starting point for navigating throughout the system.

Typically, you will enter the system at the *Banner*. You will then click to select the *Banner* menu or the *My Banner* menu. Select the folder next to a menu to expand the menu so you can see the objects it contains. Select the folder again to collapse the menu. You can bypass the menus by typing the seven-character name of the form or report you want to use into the *Go To* field, and pressing **Return**.



Using the Banner Menu Folders

The main menu provides many options for navigating Banner, as well as a place to create your own custom menus and links for frequently accessed forms, processes and external web sites.



The large pane of the main menu displays two menus:

My Banner: This menu may contain the menus, forms, jobs and QuickFlows most important in the workday of the individual user. This menu is tied to a user's Oracle user ID.

Banner Menu: This menu organizes, forms, jobs, and QuickFlows by the following Banner products: Student, Advancement, Finance, Human Resources, Financial Aid, and General.

Expanding and Collapsing Menus

Menus can be expanded and collapsed:

- When a menu is expanded, the next level of menus is visible and the open folder  sign is displayed at the front of the menu.
- When a menu is collapsed, the next level does not appear and the closed folder  sign is displayed.

By expanding and collapsing menus, you can easily navigate through Banner. You can easily view and navigate through the hierarchy of menus. You can click a menu name to expand one level. You can keep expanding menus until you find the menu items you want. You can also collapse an open menu by clicking it a second time. You can quickly view the menu path you have opened and return to a previous level of the menu path or switch to another menu by clicking on the horizontal menu options.

Selecting a Menu Item

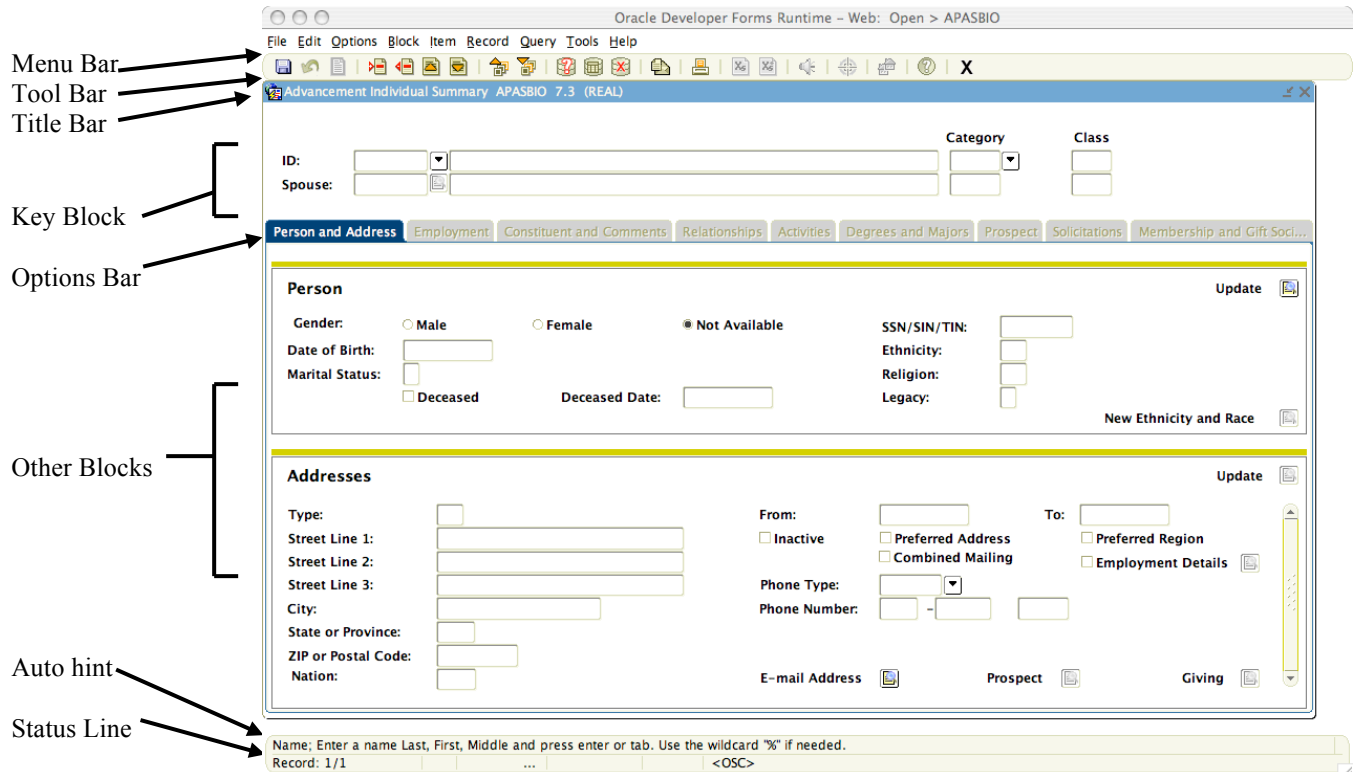
Once you see the form, job, or QuickFlow, double click the item to open the selected object.

Using Direct Access

If you know the seven-character form name, you can use the **Go To...** (Direct Access) field to quickly go to that object. You can also use the new code/description look up feature in the Direct Access field to quickly search for an object by full or partial name or description. If you don't know enough information to use the lookup feature, you can double-click to get the Object Search Form (GUIOBS) and perform an object search.

PARTS OF A FORM

The *General Menu* displays one of eight types of forms used in the system – the Menu form. The most common type, however, is the basic data entry form, which is used to enter, update, and query information. Below is a picture of a data entry form. Descriptions of the key parts of this form follow.



The Menu Bar, located at the top of every form, contains pull-down menus.

File Edit Options Block Item Record Query Tools Help

You can access an option in a pull-down menu at any time, except when you are in the midst of working with a dialog box, alert box, or List of Values (LOV). If a pull-down menu name is grayed out, that item is disabled and cannot be accessed.

Pull-down menus work in typical Windows™ fashion:

- Click the desired pull-down menu name. Menu item choices appear.
- Click the desired menu item.

Tool bars are sets of icon buttons (buttons with *icons*, or pictures, on them) that perform common functions. The horizontal toolbar appears directly under the menu bar.

When you move your cursor to an icon button and pause for a second or two, a rectangle appears with text that describes the function of the button.

To access a toolbar function, click the appropriate icon button. You can click a button any time, except when you are in the midst of working with a dialog box, alert box, or List of Values (LOV). A dimmed button is disabled and cannot be clicked.

The **Title Bar** shows the descriptive form name (in this case, *Advancement Individual Summary*), the seven-character form name (APASBIO), the release number of the software (7.3), and the name of the database you are logged into (REAL).

The **Key Block** allows one to search for individuals and organizations or to enter an ID number directly.

The **Options Bar** provides quick links to other parts of the form or to other forms without returning to the General Menu.

The **Auto Hint** at the bottom of the form can contain the following information for the field where the cursor is located:

- *Brief field description*
- Error and processing messages
- Keyboard equivalents, if you can access other blocks, windows, or forms from the field

The **Status Line** directly under the auto hint can contain one or more of the following messages:

Record n/n Shows the number of the current record followed by the total number of records in the current block. If there are more records than fit in the window, the total appears as a question mark (for example, 3/?) until you scroll to the last record in the block. Once the last record is displayed, the total appears as a number (for example, 3/15).

List of Values Indicates the field has a List of Values.

Enter Query

Indicates the form is in query mode.

Pull-Down Menus

What follows is a description of what you will find in each of the various Pull-Down Menus accessible from the Menu Bar, working from left to right.

File Menu

This pull-down menu contains standard Banner™ and Oracle™ functions. The bottom of the menu lists the last forms (up to ten) you have accessed in your current session. You can return to any form in this list by clicking on its name.

Some of the menu items let you call another form, job, or QuickFlow. When you exit the called object, you return to the object you were previously using.

Direct Access	Displays the <i>Direct Access Form</i> (GUAPARM), which is used to access a form by its seven-character name.
Object Search	Displays the <i>Object Search Form</i> (GUIOBS), which is used to search for a menu, form, job, or QuickFlow with part of the name, description, or type.
QuickFlow	Displays the <i>QuickFlow Form</i> (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	<i>On Application and Inquiry forms</i> Clears all information (except key information) and returns the cursor to the first field in the key block. <i>On Validation forms</i> Returns the cursor to the first field on the form. <i>On Query forms</i> Returns the cursor to the first field on the form.
Save	Saves all changes entered since the last time you saved.
Refresh	Clears the message line.
Print	Prints the current window with the date and time in the title bar.
Exit	<i>On forms and windows</i> Exits you from the form or window. <i>From main menu</i> Exits you from Banner. <i>In Query mode</i> Cancels the query and takes the form out of query mode.

Exit QuickFlow	Exits you from a QuickFlow.
Preferences	Displays the <i>Personal Preferences Maintenance Form</i> (GUAUPRF), with which you may customize your view of Banner™.
List of recently accessed forms	Lets you quickly re-access forms that were previously accessed in your current session (up to ten).

Edit Menu

This pull-down menu contains the functions used to edit text items.

Cut	Cuts selected text and places it on the clipboard.
Copy	Copies selected text to the clipboard.
Paste	Pastes text from the clipboard to the spot where the cursor is located.
Edit	Displays the Editor window, which is used to enter or update text. You can display this window from most fields. It is particularly useful in long data fields.

Options Menu

This pull-down menu contains the functions used to navigate among the blocks of information on a form.

Navigation options vary from form to form and depend on where the cursor is currently located. Some options take you to other blocks and windows within the current form. Other options take you outside the current form to related forms. For options that take you outside the current form, you can optionally display the form Preferences Displays the *General User Preferences Maintenance Form* (GUAUPRF), which is used to customize Banner for individual users.

Block Menu

This pull-down menu contains the functions used to navigate among the fields or items on a form.

Previous	Moves the cursor to the previous enterable field in the current block. If the previous block is in another window, that window is opened.
Next	Moves the cursor to the next enterable field in the current block. Occasionally, <i>Next Field</i> moves the cursor to the first enterable field in the next block. If the next block is in another window, that window is opened. (information is not removed from any records or tables).

Item Menu

This pull-down menu contains the functions used to work with records on a form.

Previous	Moves the cursor to the previous enterable field in the current record.
Next	Moves the cursor to the next enterable field in the current block. Occasionally, <i>Next Item</i> moves the cursor to the first enterable field in the next block.
Clear	Clears all information from the current record on your display (information is not removed from any records or tables).
Duplicate	In a blank row of a repeating record, duplicates the contents of the same field in the previous record and copies it into the new record.

Record Menu

This pull-down menu contains the functions used to work with records on a form.

Previous	Moves the cursor to the first enterable field in the previous record of the current form.
Next	Moves the 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	Scrolls up the list of repeating records, putting the first displayed record near the bottom of the list.
Scroll Down	Scrolls down the list of repeating records, putting the last displayed record near the top of the list.
Clear	Clears all information from the current record (information is not removed from any records or tables).
Remove	Removes all information from the current record. When you Save , the removed information is deleted.
Insert	Inserts a new blank record into the list of existing records.
Duplicate	Duplicates the contents of all fields in the record and copies them into a new record.
Lock	Temporarily locks the contents of the record so no other Banner user can update it. Save , Rollback , and Exit to release the lock.

Query Menu

This pull-down menu contains the functions used to query information in the database based on specified criteria.

Enter	Puts the form into query mode so you can enter search criteria to see what information is already in the database.
Execute	Searches the database and displays the first set of records that match your search criteria.
Last Criteria	Enters the criteria from your last search.
Cancel	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 in the Auto Hint line.
Fetch Next Set	If more records meet the search criteria than fit in the window, replaces the current set of displayed records with the next set.

Tools Menu

This pull-down menu contains actions that are not enabled at Reed.

Help Menu

This pull-down menu contains various help tools.

Online Help	Displays online information for the current field NOTE: 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 help for a field, block, or form.
Dynamic Help Edit	Displays the Dynamic Help Form (GUAHELP) in edit mode, which is used to edit traditional help for a field, block, or form.
Help (Item Properties)	Displays the Oracle™ item properties window for the current field.
Show Keys	Displays the Keys list, which lists the functions and their equivalent keystrokes available for the current form, window, and field.
List	Displays the List of Values (valid entries for the current field) if one is available. NOTE: “Press LIST for valid codes” will be in the Status Line, if a list of values is available.

Display Error If an Oracle™ error occurs, displays the code that is in error.

Display Image If the cursor is in an **ID** field, displays the image associated with the ID, if available.



Calendar Displays the calendar.

Calculator Displays the calculator.

Extract Data With Key Extract details in the current block with data from key block.

Extract Data No Key Extract details in the current block without data from key block.

Technical Support Turns the SQL Trace feature on and off. SQL Trace is a tool that helps your technical support staff track performance issues that need to be resolved (not enabled at Reed)

About Banner Displays the *About Banner* Form (GUAABOT), which identifies the current form, release number, date, and time, as well as legal statements and copyright information for Banner.

This form also displays a list of installed Banner products, their release number, and their installation date. This information will be helpful if you need to contact the ActionLine with a question or problem.

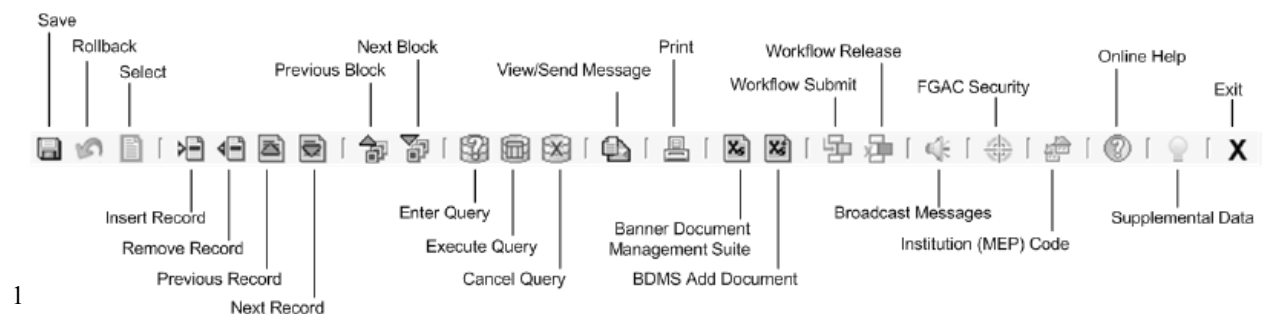
Toolbars

The Banner toolbar contains buttons that perform common functions. It is located directly under the menu bar.

When you move your cursor to an icon button and pause for a second or two, a rectangle appears with text that describes the function of the button.

To access a toolbar function, click the appropriate icon button. You can click a button any time, except when you are in the midst of working with a dialog box, alert box, or List of Values (LOV). A dimmed button is disabled and cannot be clicked.

Pictured here are the standard icon buttons which appear on the horizontal toolbar, with their functions identified. Not all are available at Reed.

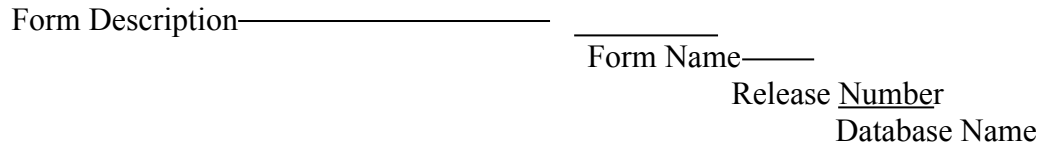


Title Bar

The title bar shows the following information:

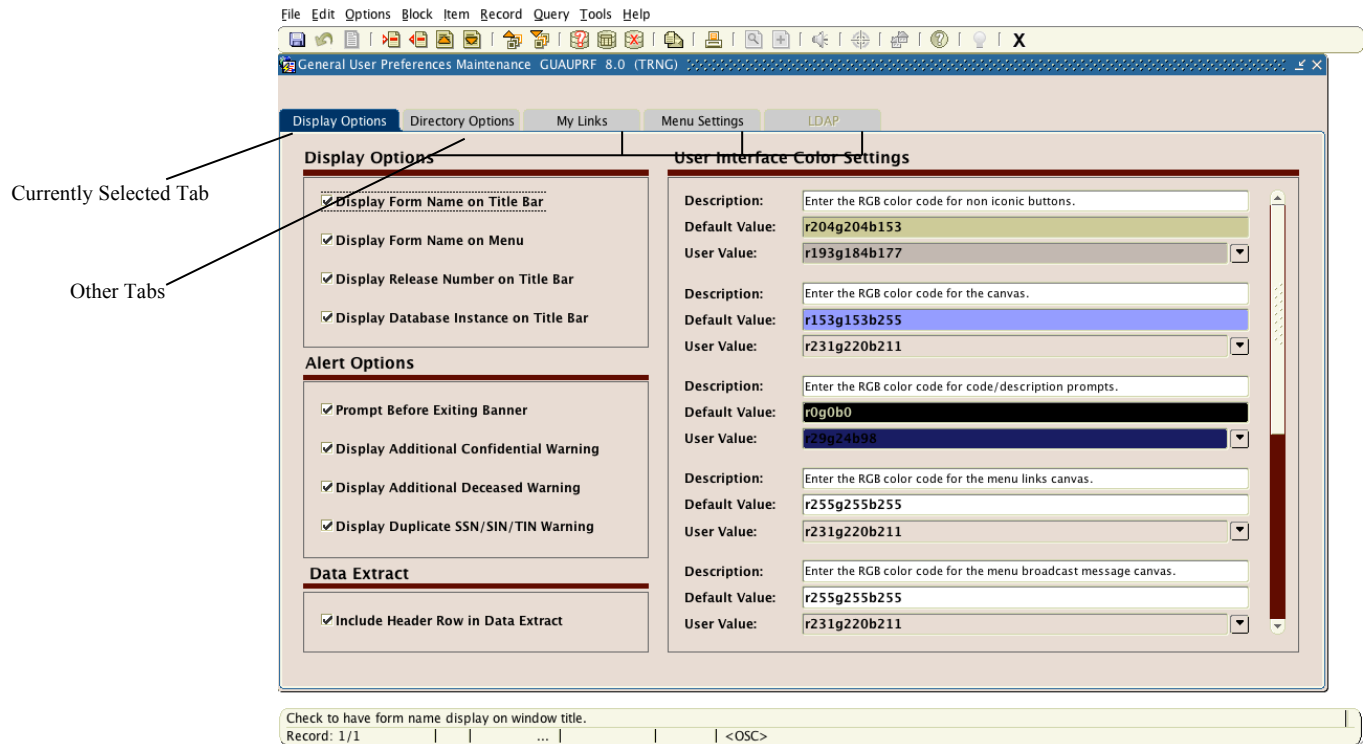
- Descriptive form name
- Form name
- Release Number
- Database name from the Installation Control Form (GUAINST)

Individual users can remove any of this information except the descriptive form name.



Tabs

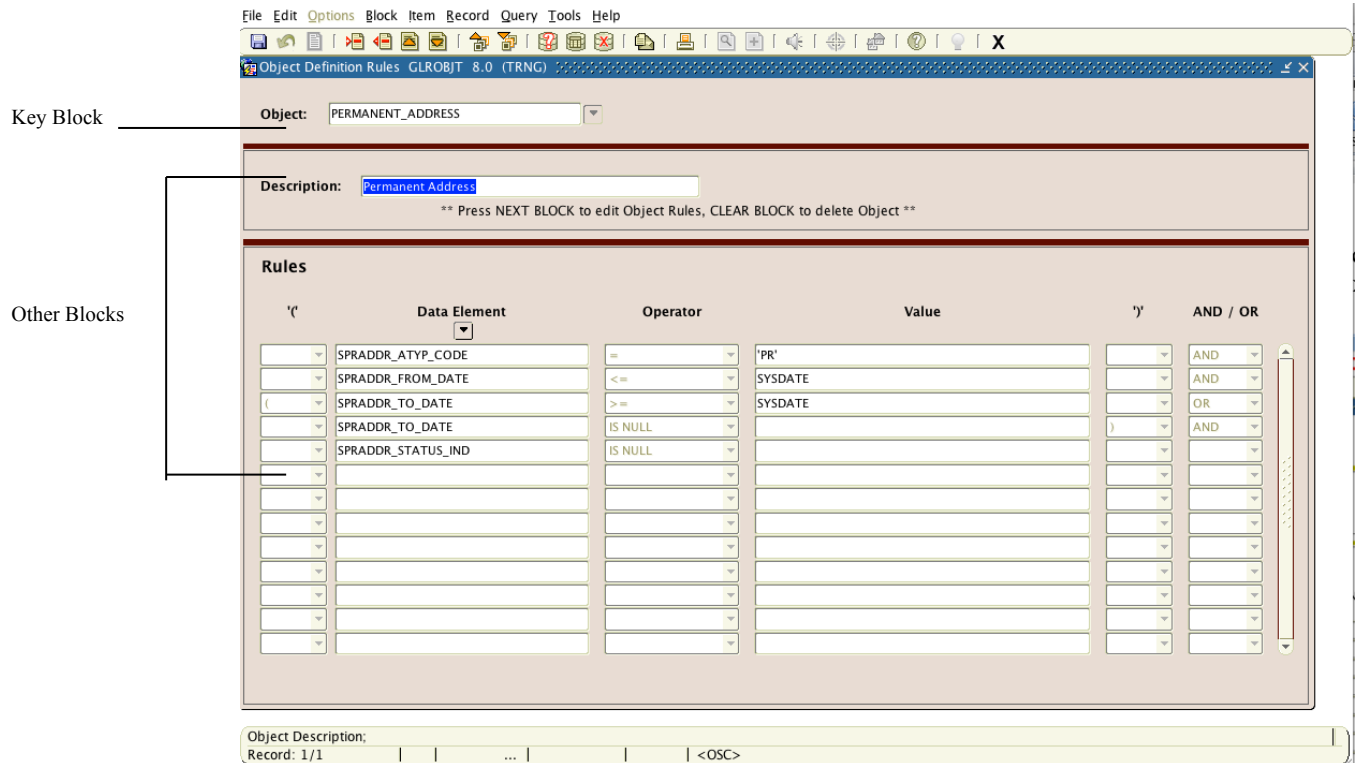
Certain forms feature a tabbed interface. Tabs are used to arrange information in a meaningful way, and allow you to navigate easily between groups or blocks of information. Tab titles reflect the contents of a particular window or grouping of information.



For tabbed forms that contain windows of parent/child information, the main (“parent”) tab appears in the top row. The dependent (“child”) information appears on tabs lower on the window and below the top-level tab to which the information is related.

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 appear enclosed in a beveled box.



Most blocks have a title. There are three exceptions:

- A key block does not have a title.
- If a form or window has only one block, the block does not have a title.
- If a form has a key block and only one other block, the second block has no title.

Key Block

The first block on most forms contains key information. Validation forms and certain list forms do not have a key block. The key block determines what is entered or displayed on the rest of the form. All information on the form references the key block.

The key block has at least one field (e.g., an ID on APASBIO). Others have multiple items in the key block such as an Event and a Function (as on GEAATTD).

The key block stays on the form as subsequent blocks appear. Occasionally, another window may appear on top of the key block if the window is unusually large or if the key block is not pertinent to the window.

When the cursor is in the key block, enterable fields in the key block are enabled. When you leave the key block, enterable fields in the key block are disabled.

Blocks containing related information (e.g., student interests) related to the specific key block (e.g., a student ID). The information is often enclosed in a beveled box.

Other Blocks

Other blocks contain additional details for the key information. Each block contains related information and is usually enclosed in a beveled box.

Auto Hint

The auto hint at the bottom of the form can contain the following information for the field where the cursor is located:

- *Brief field description*
- Error and processing messages
- Keyboard equivalents, if you can access other blocks, windows, or forms from the field

Status Line

The status line directly under the auto hint can contain one or more of the following messages:

Record n/n Shows the number of the current record followed by the total number of records in the current block. If there are more records than fit in the window, the total appears as a question mark (for example, 3/?) until you scroll to the last record in the block. Once the last record is displayed, the total appears as a number (for example, 3/15).

List of Values Indicates the field has a List of Values.

Enter Query

Indicates the form is in query mode.

OBJECT NAMING CONVENTIONS

All Banner™ forms, reports, jobs, QuickFlows, and tables (also know as objects) have seven-character names that define the object.

Position	General	Student	Accounts Receivable
1 system	G	S	T
2 module	E Event Management J Job Submission L Letter Generation O Overall P Purge S Security V Validation U Utility X Cross Product	A Admissions C Catalog E Support Services F Registration/Fee Assessment G General Student H Grades/Academic History I Faculty Load L Location Management M CAPP O Overall P Person R Recruiting S Schedule T Validation U Utility	F Finance A/R G General A/R O Overall R Research Accounting S Student A/R T Validation U Utility V Authorizations
3 object type	A Application Form B Base Table I Inquiry Form Q Query Form R Report/Repeating Table V Validation Form/Table		
4-7	The object's name		

Example 1: **SAAADMS**

Position 1 **S** Student system
 Position 2 **A** Admissions
 Position 3 **A** Application form
 Positions 4-7 **ADMISSON**S form

Example 2: **GJAPCTL**

Position 1 **G** General system
 Position 2 **J** Job Submission
 Position 3 **A** Application form
 Positions 4-7 **PROCESS** Control form

Example 3: **SFRSLST**

Position 1 **S** Student system
 Position 2 **F** Registration
 Position 3 **R** Report
 Position 4-7 **STUDENT** List

Example 4: **TSIQACT**

Position 1 **T** Accounts Receivable
 Position 2 **S** Student A/R
 Position 3 **I** Inquiry form
 Position 4-7 **QUERY** Account

NAVIGATION METHODS: HOW TO GET AROUND IN THE SYSTEM

There are various ways to navigate through the system. You can use the following methods.

Main Menu	Select from a list of menus, forms, jobs, and QuickFlows.
Direct Access	Access a menu, form, job, or QuickFlow by typing its seven-character name.
Object Search	Access a form, job, or QuickFlow if you know part of its name, description, or type.
Site Map	View a list of the top-level menus and one level below them.
Tabs	Access windows on tabbed forms by selecting the tab.
Options Menu	Access other forms, windows, and blocks related to the current form, window, and block
Option List	Right-click on a form anywhere outside a field to display the Option List, from which you can perform functions, navigate to other parts of the form, or add the form to your personal menu.
Buttons	Access another form or window related to the current record or field.
Mouse	Click an icon button, field, record, block, or window that is currently displayed.
Keyboard	Use keystroke combinations to access a form, window, block, or field.
QuickFlow	Automatically access forms that are linked in a chain.
File Pull-down	Quickly access any of the last 10 forms previously opened in the current session.
Display Navigation	Press this key on any form to display a navigation window that enables you to enter the name of another form or job and navigate to it.



The following pages describe each navigation method in detail.

Main Menu

You can use the main menu to select from a list of the menus, forms, jobs, and QuickFlows in Banner. The main menu shows the various levels of menus at Reed. These levels are nested within a hierarchical folder structure. You can easily navigate through Banner by expanding and collapsing these menus. Once you have “drilled down” to the item you want, you can click its link to access it.

To expand a menu:

Double-click the menu name or the closed folder in front of the menu name. The folder opens, the menu name is highlighted, and the next level of menus appears (if the menu includes sub-menus).

To collapse a menu:

Double-click the name of the open menu or the open folder in front of the menu name. The folder closes, and the next level of menus disappears (if the menu includes sub-menus).

To quickly return to the Banner Menu, or My Banner Menu:

Double-click the desired menu from the Products pull-down list at the top of the menu, or scroll through the expanded folder structure to find the menu you want.

To access a menu item:

1. Expand the menu you want to access.
2. Continue expanding menus in the left pane until you see the desired form, job, or QuickFlow.
3. Double-click the name of the form, job, or QuickFlow you want to access.

Direct Access

You can use Direct Access to access a menu, form, job, or QuickFlow by its seven-character name. You can use Direct Access from the main menu or from a form.

To use Direct Access from the Main Menu:

1. Enter the seven-character name of the menu, form, job, or QuickFlow in the *Go To* field (see Parts of the Main Menu).
2. Press **Enter**

To use Direct Access from a form:

When you use Direct Access from a form, the current form remains open. When you exit the requested form, job, or QuickFlow, you return to the original form.

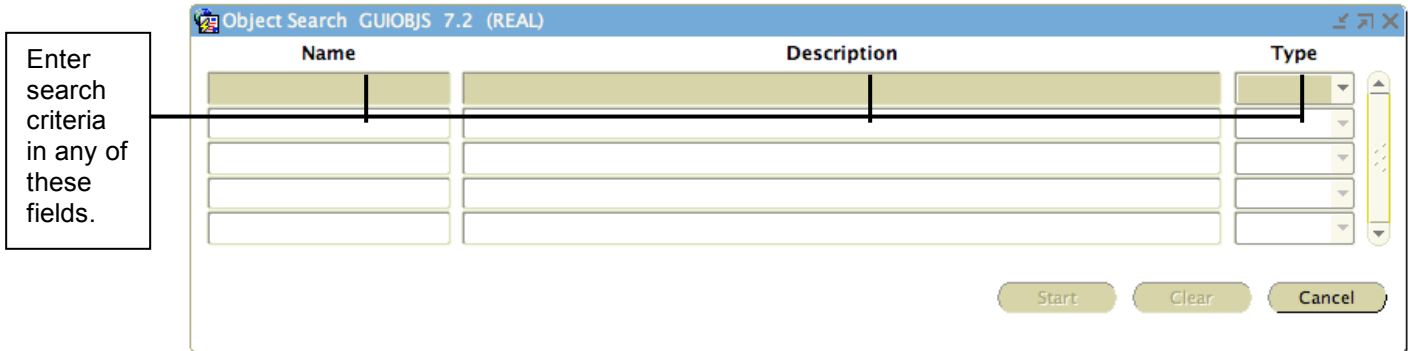
1. From the **File** pull-down menu on your menu bar select **Direct Access**. The Direct Access Form (GUAPARM) appears
2. Enter the seven-character name of the form, job, or QuickFlow in the **Enter a valid name** field (you cannot use Direct Access to access a menu from a form).
3. Click the Start button or press **Enter**


Object Search

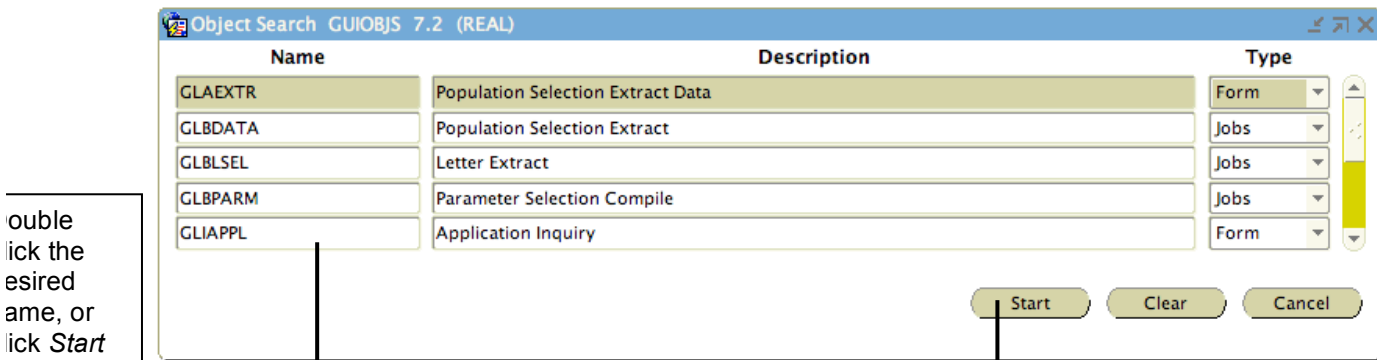
You can use Object Search to access a form, job, or QuickFlow if you know part of its name, description, or type.

To use Object Search:

1. Press F9 or Double-click the *Direct Access* field on the main menu.
OR
Select *File*→*Object Search* from any form.
2. Enter your search criteria on the Object Search Form (GUIOBJ5).
You can use any or all of the *Name*, *Description*, and *Type* fields. You can use the Oracle™ wildcards % and _.

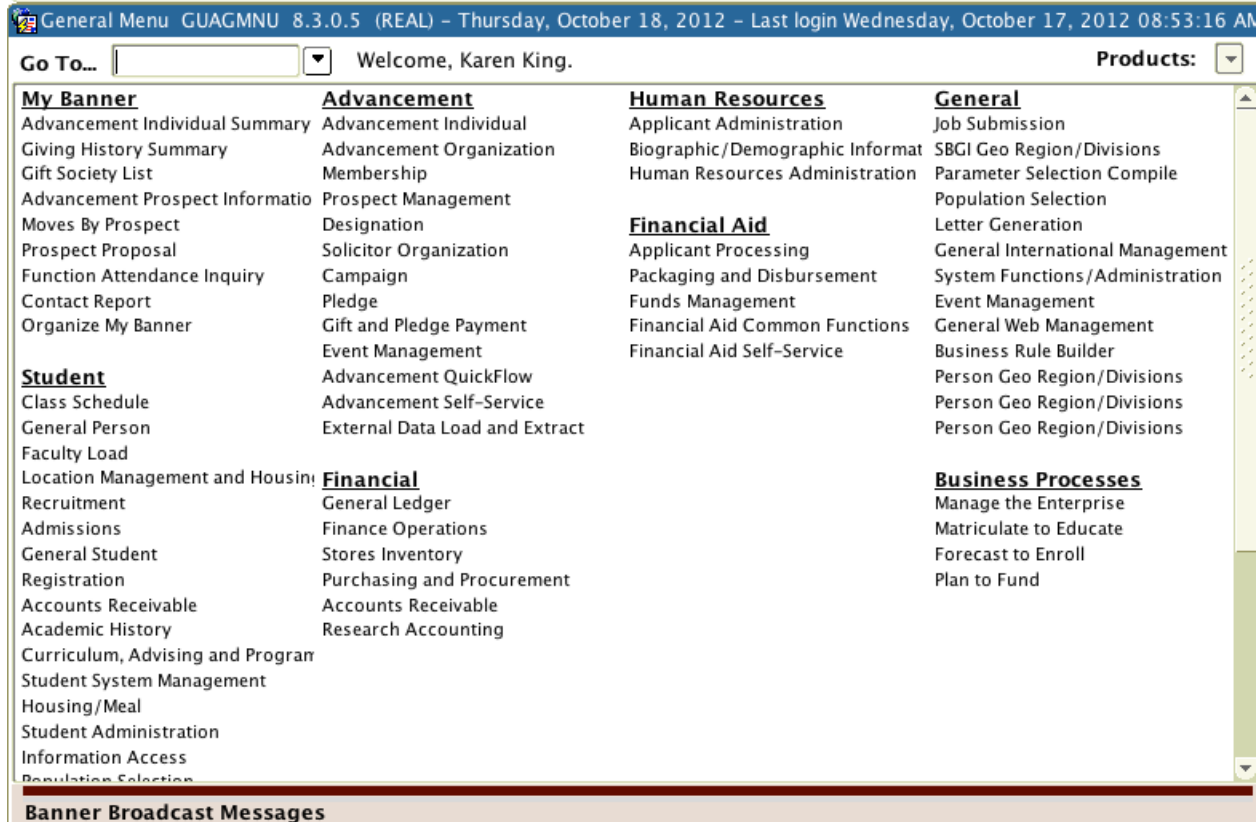


3. *Execute Query* (click on  or select *Query*→*Execute*). A list of all matches appears.
4. *Scroll to the desired name*.
5. *Double-click the desired name or click the **Start** button*.



Site Map

The site map appears on a separate page accessible by selecting the Site Map link on the main menu. It lists the top-level menus in your installation, and one level below them. There are no fields on it, only links to the various menus and forms.

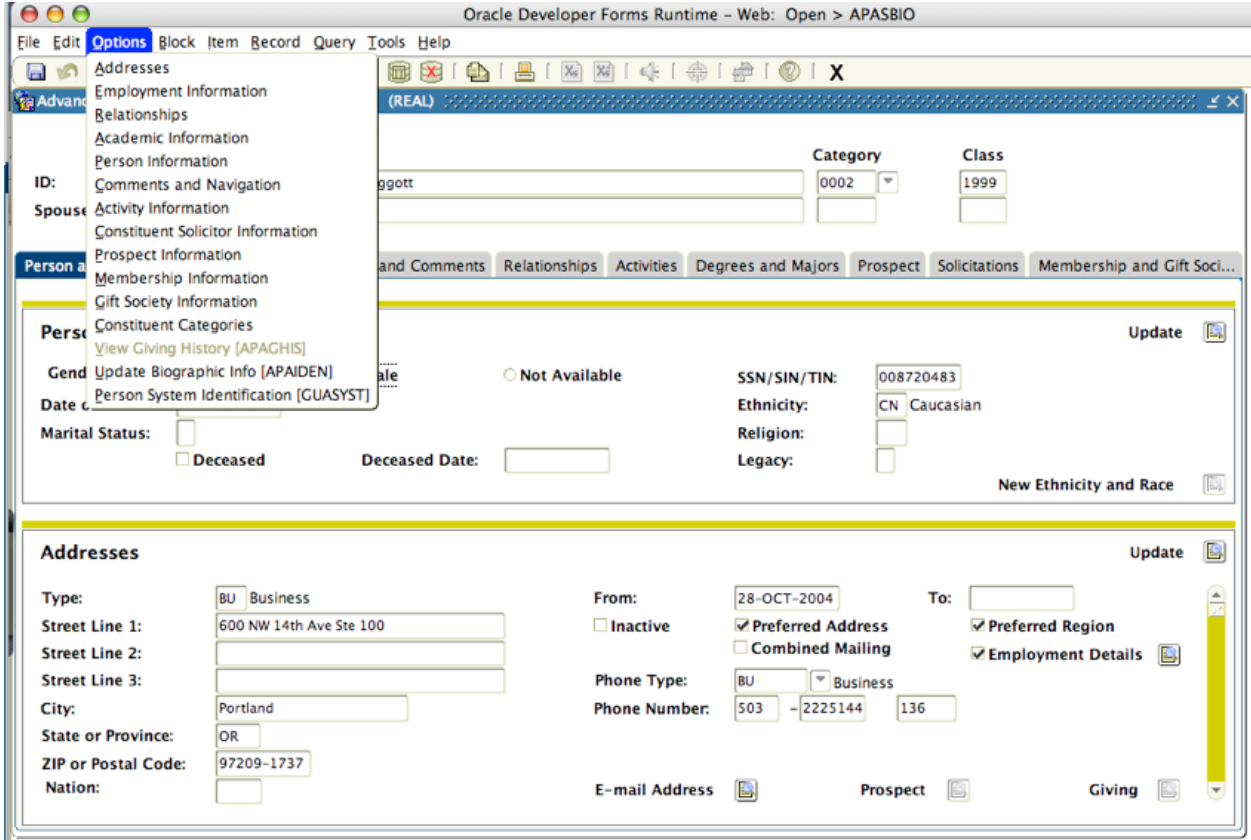


Tabs

Certain forms feature a tabbed interface. Tabs are used to arrange information in a meaningful way, and allow you to navigate easily between groups or blocks of information. Tab titles reflect the contents of a particular window or grouping of information.

Options Menu

You can use the Options menu from the Menu Bar of a form to navigate within Banner. Options change as the cursor location changes. Some options take you to other blocks and windows within the current form. Other options take you outside the current form to other related forms.



Option Window

When you right-click anywhere on a form (except from within a field), the pop-up Option window appears. It contains different options related to the form, such as functions you can perform and navigation options. You can also choose to add the form to your personal menu.



To see the form that you just added to your personal menu via the Option window, you must first refresh the menu by either clicking the Menu link on GUAGMNU or entering “Refresh” in the *Go To* field.

Toolbar Buttons (Icons)

You can use icon buttons to access a form or window related to the record or field where the cursor is currently located.

To select an icon button:

1. Click on the button.
2. *The form or window appears automatically. If an Option List appears instead, simply click the desired option.*

Mouse

You can use the mouse to navigate to an enterable field, record, block, or window that is currently displayed. You don't have to access fields in a specific order. You can also use the mouse to click toolbar buttons (icons).

Keyboard Equivalents

In many cases, you can use combinations of keyboard keys to access a form, window, block, or field.

*To access a **form** with keyboard equivalents:*

1. Read the Auto Hint message to determine whether a redefined function lets you navigate to another form (*Count Query Hits*, *Duplicate Field*, *Duplicate Record*, *Exit with Value*, and *List* are the most commonly redefined functions).
2. If a redefined function is available, use *Show Keys* (from the toolbar or the pull-down menu) to find the keyboard equivalent for the redefined function or refer to the Keystroke Conversion chart referred to on p. 59.
3. *Use the keyboard equivalent to access the form.*

*To access a **window or block** with keyboard equivalents:*

Use the keyboard equivalents for Next Block (**Ctrl+Page Down**) and Previous Block (**Ctrl+Page Up**) to move among blocks. If the next/previous block is in another window, these keys take you to the other window. Sometimes there are actually two blocks that visually appear to be one, making it *seem* that you are moving within the same block.

*To access a **field** with keyboard equivalents:*

Use the **Tab** or **Enter** key (Next Field) and **Shift+Tab** keys (Previous Field) to move among fields – in the specific order coded into the form. If a field has the Autoskip feature, the cursor automatically moves to the next field as soon as you enter the required number of characters.



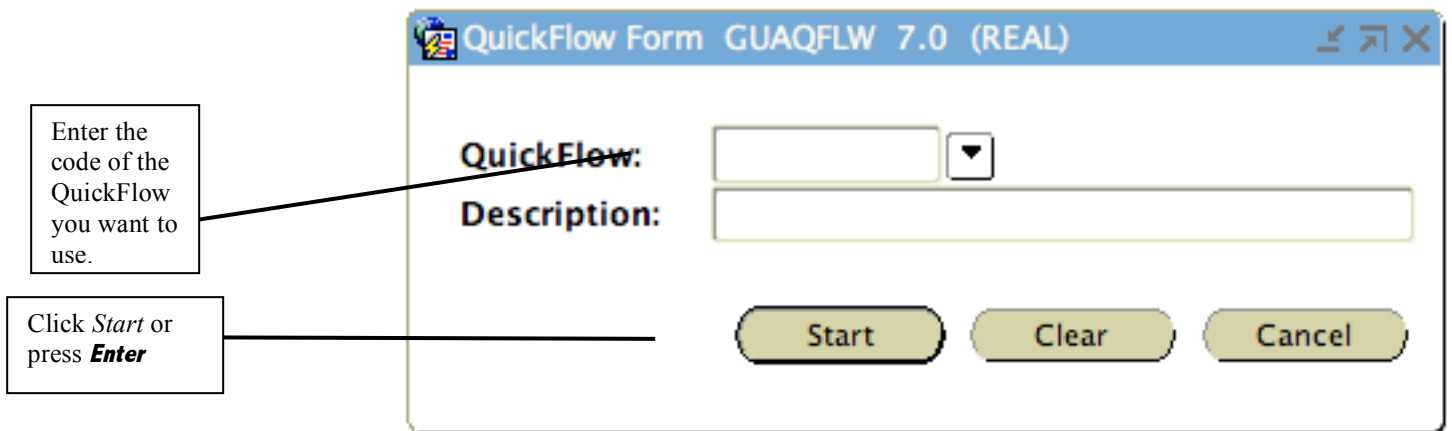
Selecting Help→Show Keys from the menu bar displays a list of program functions and their keyboard equivalents.

QuickFlows

You can use a QuickFlow to access forms that are linked in a chain. Activating a QuickFlow opens the first form in the chain. When you *Exit* that form, the next form you need automatically opens.

To use a *QuickFlow*:

1. Select **File**→**QuickFlow** or use Direct Access to display the QuickFlow Form (GUAQFLW).



2. Enter the QuickFlow code into the *QuickFlow* field. (On a menu form you can enter the QuickFlow name directly into the *Direct Access* field.)
3. Click the *Start* button, press **Enter**, or select the *Next Block* function. The first form in the QuickFlow appears.
4. Enter data on the form.
5. Exit the form (click the *Exit* icon **X**). The next form in the QuickFlow appears.
6. Repeat steps 4 and 5 for each form in the QuickFlow. After you pass through all the forms in the QuickFlow, the GUAQFLW Form reappears.



If you want to exit the QuickFlow before all the forms are accessed, select **File**→**Exit QuickFlow**. If you do not have any data to enter on a form, exit it.

If the message DO YOU WANT TO QUIT? appears, answer [Y].

7. When you are finished with the QuickFlow, exit the GUAQFLW Form. If you want to execute the QuickFlow again, return to step 3.

The *File* Pull-Down Menu – Last 10 Forms

You can quickly access a form that was previously opened in your *current* session. The bottom of the *File* pull-down menu lists the last forms (up to ten) you used in *this* session. You can access any of these forms by simply clicking on *File* to display the list, and then clicking on the name of the form you wish to access.

The only forms that never appear in this list are the QuickFlow (GUAQFLW), Direct Access (GUAPARM), and Object Search Forms (GUIOBS).

Display Navigation Window Key

The Display Navigation Window key displays a navigation window on the top of your screen that allows you to enter the name of a form and then navigate to it. Usually this key is F5, but your individual computer may be set up to use a different key.


The navigation mini-window also contains the My Institution link that appears on the main menu.

To exit the navigation window, press **F5** (or equivalent on your computer) again, or perform a Next Block or Previous Block function.

SEARCHING FOR RECORDS

The Search function can be used to locate a record for a specific individual or entity. Searching is generally performed from a query form.

To activate a search and select a record:

1. Click on the Search icon button. 
2. A query form will be displayed. The query form provides a list of fields, where you may enter search criteria.
3. After entering the search criteria, press **F8**
4. Review the results. Click on the id of the record you want to highlight it. Double-click it to select it.

Using Wildcards in Searches

Wildcard characters may be used to search for a specific record when you are uncertain of the exact contents for a given field. The wildcard characters % and _ are used in the search criteria.

- % represents any number of unspecified characters
- _ represents one occurrence of an unspecified character

The following examples illustrate the use of wildcards:

To get these results	Enter this criteria
All entries that contain <i>ma</i>	%ma%
All entries that begin with <i>ma</i>	Ma%
All entries that have <i>ma</i> as the final two characters	%ma
All entries that have <i>m</i> as the second character	_m%

Using Soundex

The Soundex Search is used to locate records that may have the same phonetic sound or a similar pattern of characters as the criteria you entered. If you're not sure how to spell a name, you can use the Soundex Search window.

To perform a Soundex Search, follow these steps:

1. Click the Search button next to the ID field on a form. An Option List appears.
2. Select the option for the search you want to access. The selected form opens in query mode.
3. Select the Cancel Query function.
4. Select the Search Using "Sounds Like" option from the Option menu or select the Next Block function. The Soundex Search window appears.
5. Enter a string of characters for the last name you want to find.
You can use upper, lower or mixed case. You can enter as much or as little of the name as you know. As long as the first letter is correct, the search will retrieve names with a similar pattern of characters.

6. (Optional) Enter a string of characters for the first name you want to find.
7. Select the Execute Query function. The search form shows all ID's that have a matching pattern of characters.
8. Scroll to the desired ID.
9. Double-click the desired ID. The ID and name are returned to the calling form.

Examples	If you enter this:	The results will include:
	smith	Smith, Schmidt, Smythe, Smithy, Smithe
	peterson	Patrick, Patricks, Peters, Peterson, Patterson, Petras, Petrush

ID/Name Search

A new search feature can be used in most ID/name fields to look up a name and/or ID from the SPRIDEN Table and return all ID and name information to the current form. You can enter a complete ID, a complete name, search criteria for an ID, or search criteria for a name.

There are two exceptions to this new feature:

- The ID/name search is not available for ID and name fields that don't go against the SPRIDEN Table.
- Other ID and name fields that are displayed with variations may not have this functionality applied, depending on the functional decision of the product. You can tell whether this functionality is available if you can tab into the name field.

You can also use the ID/name search feature in cases where you can skip the ID field and enter a name without having an ID in the database. Some examples of this are emergency contacts, dependents, and beneficiaries. In these cases, the ID/name search logic ignores the validation of the name & stores your entry in a table other than SPRIDEN.

As an alternative to the new ID/name search feature, you can click the **Search** button to go directly to your product-specific search form as you did in previous releases.

Note: The ID/name search functionality does not work in query mode.

Entering a Complete ID

1. Enter the full ID (for example, 213946) in the **ID** field.
2. Press Enter. The ID and name appear.

Searching by Complete Name

1. Make sure the **ID** field is blank.
2. Tab to the **Name** field (unlabeled field next to the **ID** field).
3. Enter the full name. The format is last, first, middle with a comma between each part of the name. Spaces between each piece are optional. Characters can be upper or lower case.
Examples: Smith,Thomas,James Smith,Thomas (no middle name) taylor,suzanne,katherine
4. Press **Enter**.

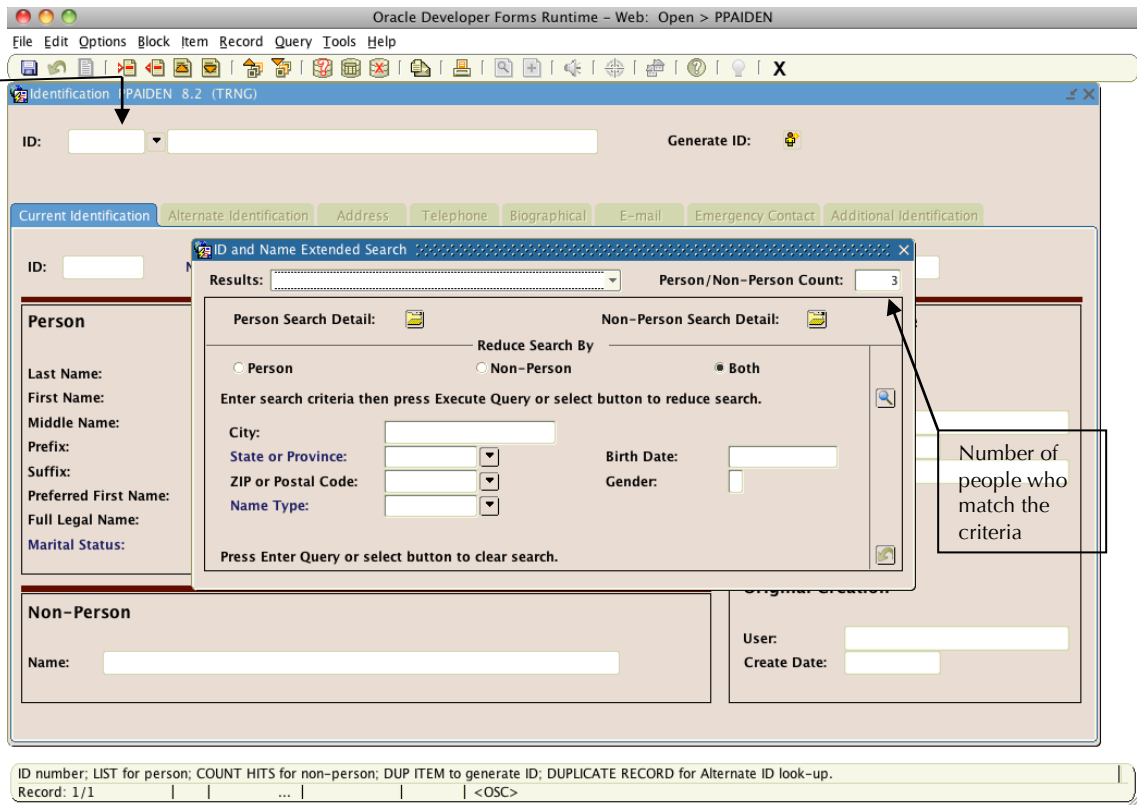
- If one match is found, the ID and name are returned to the form.
- If more than one match is found, the ID and Name Extended Search window appears. The field next to the **Search Results** field shows the number of matches.

Searching by Partial ID

1. Enter a partial ID in the **ID** field. Use the Oracle wildcard % to represent any number of characters.
Example: 21% To search for all IDs that start with “21”
2. Press **Enter**.
 - 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. The field next to the **Search Results** field shows the number of matches.

Enter a partial ID in this field. Be sure to include the Oracle wildcard %.

Press Enter. If there is more than one match, this window appears



Searching by Partial Name

1. Make sure the **ID** field is blank.
2. Tab to the **Name** field (unlabeled field next to the **ID** field).
3. Enter a partial name in the **Name** field.

The format is last, first, middle with a comma between each part of the name. Spaces between each piece are optional. Characters can be upper or lower case. You must use the Oracle wildcard % to represent any number of characters.

Examples:

- smith,J%* To search for all IDs with the last name “Smith” and first names that start with “J”
- mag%,p%* To search for all IDs with last names start with “Mag” and first names start with “P”
- ,Barbara* To search for all IDs with the first name “Barbara”

4. Press Enter.
 - 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. The field next to the **Search Results** field shows the number of matches.

The screenshot shows the Oracle Developer Forms Runtime - Web interface. The main window is titled "General Person Identification - SPAIDEN 7.0 (Ban7 DB)". It features several tabs: "Current Identification", "Alternate Identification", "Address", "Telephone", "Biographical", "E-mail", and "Emergency Contact". The "Current Identification" tab is active, showing an "ID:" field and a "Generate ID:" button. A secondary window, "ID and Name Extended Search - SPAIDEN 7.0 (Ban7 DB)", is overlaid on top. This window has a "Search Results:" field displaying "124" matches. Below this, there are sections for "Person Search Detail" and "Non-Person Search Detail". The "Person Search Detail" section includes fields for "City", "State or Province", "ZIP or Postal Code", "Name Type", "SSN/SIN/TIN", "Birth Date", and "Gender". The "Non-Person Search Detail" section includes a "Name:" field. At the bottom of the search window, there are "User:" and "Create Date:" fields. A box on the right side of the search window highlights the "Number of people who match the criteria" field, which contains the value "124". Annotations with arrows point to the "ID:" field, the search criteria input, and the search results area.

Selecting an ID from the ID and Name Extended Search Window

1. Pull down list of matches in the **Search Results** field in the ID and Name Extended Search window.

Note: Previous names and IDs are indented under the current name and ID.

2. Scroll to the desired name and ID.
3. Click the desired name and ID. The ID and name are returned to the form.

Pull down the list of matches in this field.

Scroll to the ID you want and click.

If a name is indented, it is the previous name for the ID.

The screenshot shows the Oracle Developer Forms Runtime window titled "Oracle Developer Forms Runtime - Web: Open > PPAIDEN". The main form is for "Identification: PPAIDEN 8.2 (TRNG)". It features an "ID" field with a dropdown menu. A "Generate ID:" button is visible. Below the ID field, there are tabs for "Current Identification" and "Alternate Identification". A "Person/Non-Person Count:" field shows "2338". The "Person" section includes fields for Last Name, First Name, Middle Name, Prefix, Suffix, Preferred First Name, Full Legal Name, and Marital Status. The "Non-Person" section includes a Name field, User, and Create Date fields. A "Person Search Detail" dialog box is open, showing search criteria and options to "Reduce Search By" (Person, Non-Person, Both). The search results list includes:

- Westin-McCaw, Tatiana C. L72778
- McCaw, Tatiana C. L72778
- Westin, Tatiana C. L72778
- Yee, Sylvia M. 501281
- Yee, Sylvia Mei-Ling 501281
- McCaffrey, Sylvia Yee 501281
- McCaffrey, Sylvia 501281

 The "Person" radio button is selected in the search detail dialog. The status bar at the bottom indicates "Record: 1/1" and "<OSC>".

Reducing Your Search in the ID and Name Extended Search Window

You can reduce your search by record type, city, state, ZIP, name type, SSN, birth date, or gender.

If both person and non-person records match your selection criteria, the **Both** radio button is selected by default. To reduce your search by record type (person or non-person), select the **Person** or **Non-Person** radio button in the Reduce Search By block of the ID and Name Extended Search window. Your choice identifies the kind of IDs you want to search. The field next to the **Search Results** field shows the number of matches.

To reduce your search by city, state/province, ZIP code, name type, SSN/SIN/SFN, birth date, or gender, follow these steps:

1. Enter your search criteria in the fields in the Reduce Search By block.
2. Click the Search button or select Execute Query. The field next to the **Search Results** field shows the number of matches.

Select the radio button that identifies the kind of IDs you want to search.

Enter your search criteria in one or more of these fields.

This is the number of IDs that match your refined search criteria.

CODE/DESCRIPTION LOOKUP

A lookup feature can be used in most code fields that call an LOV, Options List, or another validation form.

The code/description lookup feature lets you:

- Enter a complete code or description.
- Look up a code/description based on a partial entry.
- Display the entire LOV or form and select a code.

Entering a Complete Code or Description

1. Enter the full code (for example, *AF07*) or full description (for example, *Annual Fund 2007*).
2. Press **Enter**. The code and description appear. Depending on the field, the cursor may automatically skip to the next field.

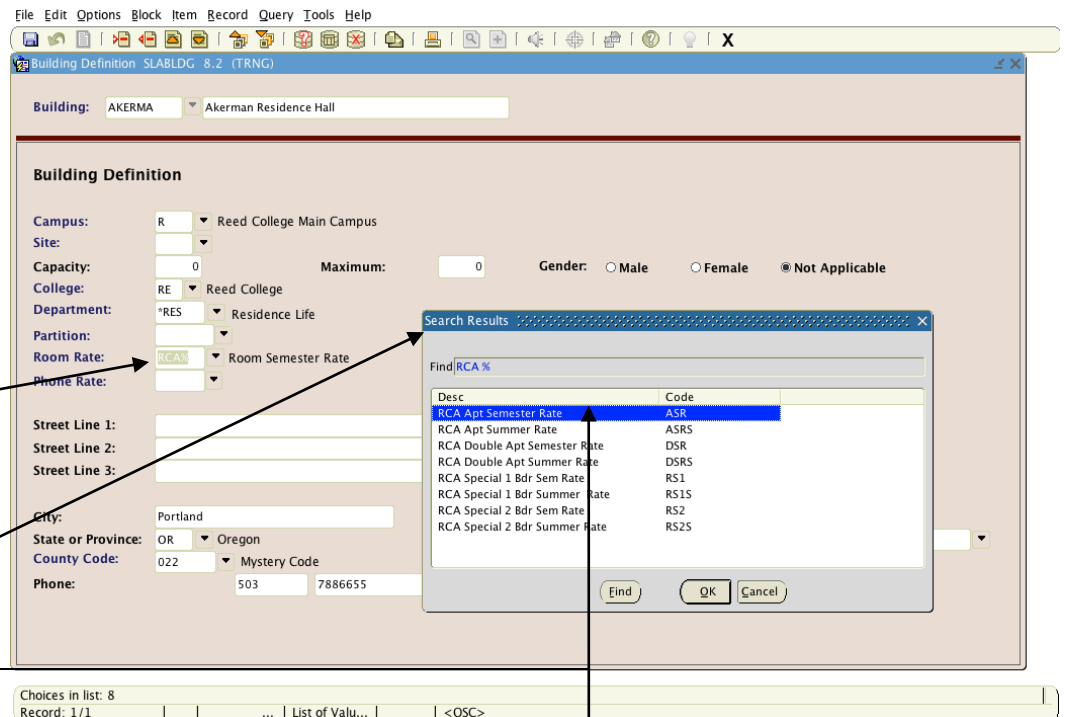
Looking Up a Partial Code or Description

1. Enter a partial code or description. Use the Oracle wildcard % to represent any number of unspecified characters. If there is no wildcard, the search looks for an exact match.
Example: A% to search for all codes and descriptions that start with “A”
2. Press **Enter**.
 - If one match is found, the code and description are returned to the form.
 - If more than one match is found, the Search Results window appears with all matches
 - If no matches are found, the auto hint displays an error message.
3. Scroll (if necessary) to the desired value in the Search Results window.
4. Double-click the value or press **Enter**. The window closes, and the selected value is returned to the code field.

Enter a partial code/desc.
Be sure to include the
Oracle wildcard %.

Press Enter. This window
appears if more than one
match is found.

Go to the code you want
and double-click it.



DISPLAYING THE ENTIRE LOV OR FORM

You can display the entire LOV or form if you do not know a full or partial code/description to enter.

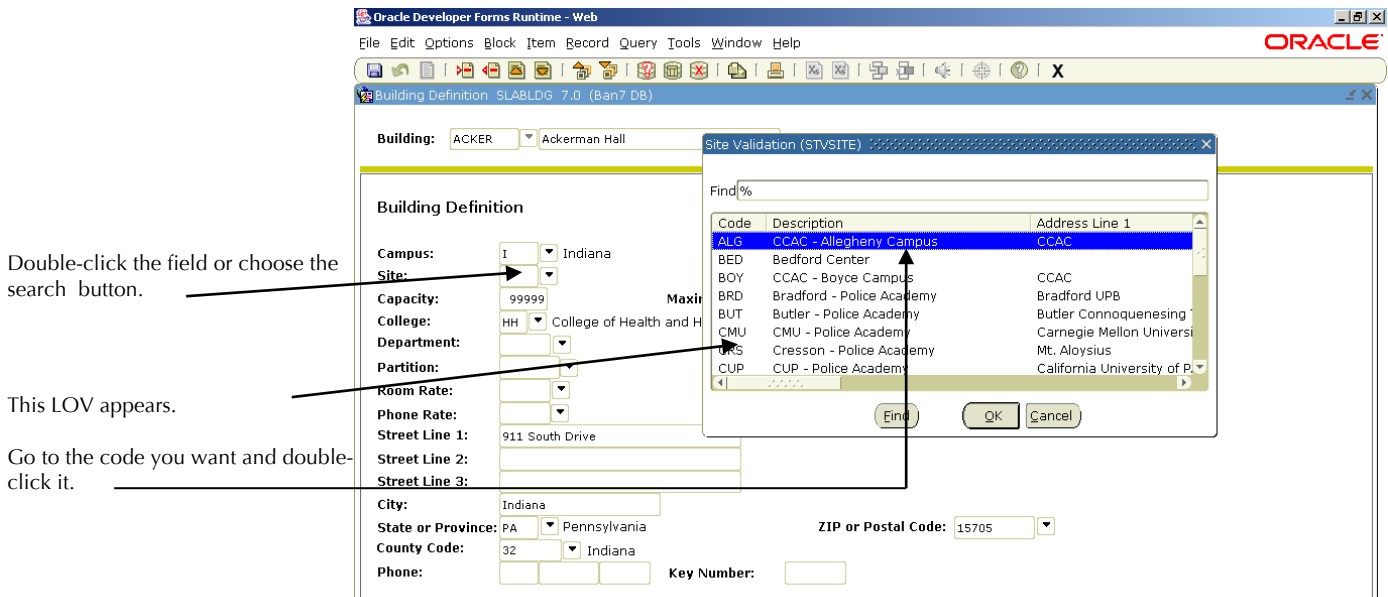
1. Double-click the code field.

Note: If you are on a form called from another form, press the **Ctrl** key before you double-click. (Double-clicking on a called form exits with a value to the calling form rather than displays an LOV.)

2. If more than one form or window is associated with the field, an Option List appears. Click the option that displays the LOV.

Otherwise, the LOV or form appears automatically.

3. Scroll (if necessary) to the desired value in the LOV or form.
4. Double-click the value. The LOV or form closes, and the selected value is returned to the code field.



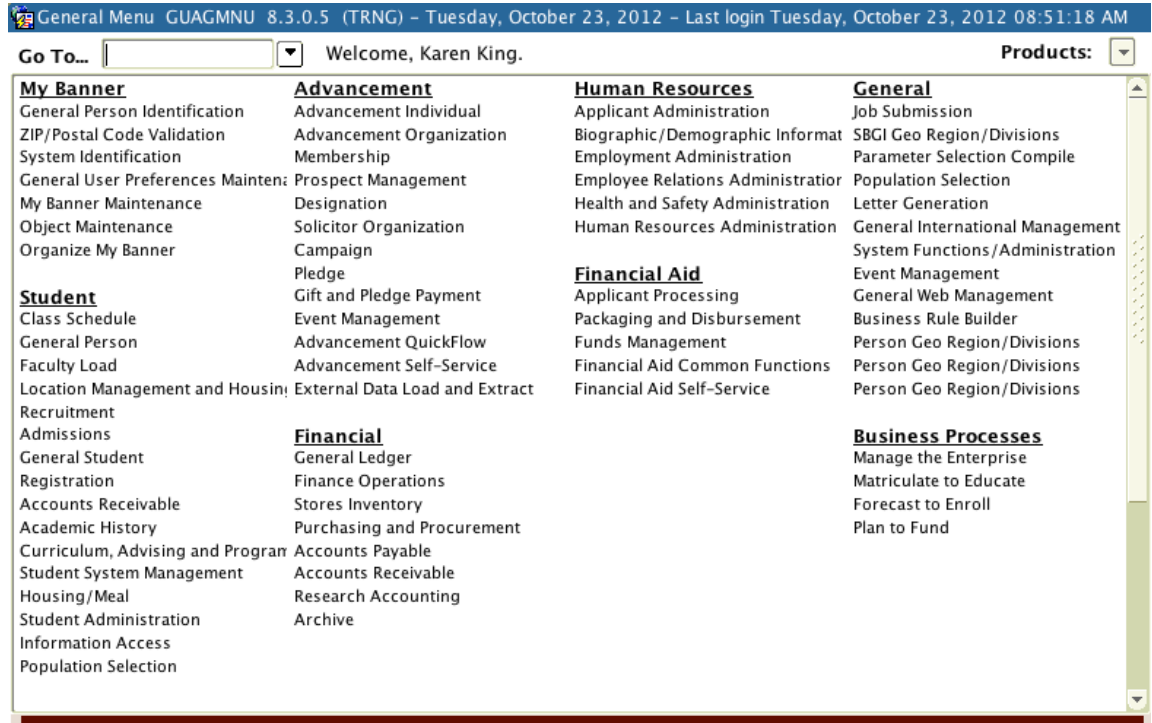
OTHER BANNER OPTIONS

Site Map

You can view a list of the top-level menus and one level below them.

The sitemap appears on a separate page accessible by selecting the Site Map link on the main menu.

There are no fields on it, only links to the various menus and forms. If you select a menu from the site map, the main menu appears, displaying the menu you selected with one level expanded.



Calendar

There are three ways to display the calendar:

- Double-click any date field, or click the *Calendar* button. If the date field has a value, the calendar highlights that date. If the date field is empty, the calendar highlights the current date. You can double-click a date on the calendar to return it to the calling form.
- Use *Direct Access* to display the *Calendar Form* (GUACALN). When accessed this way the calendar works independently of any form or field. You cannot select a date and return it to a form.
- Select Help>Calendar. When accessed this way the calendar works independently of any form or field. You cannot select a date and return it to a form.

Calculator

There are three ways to display the calculator:

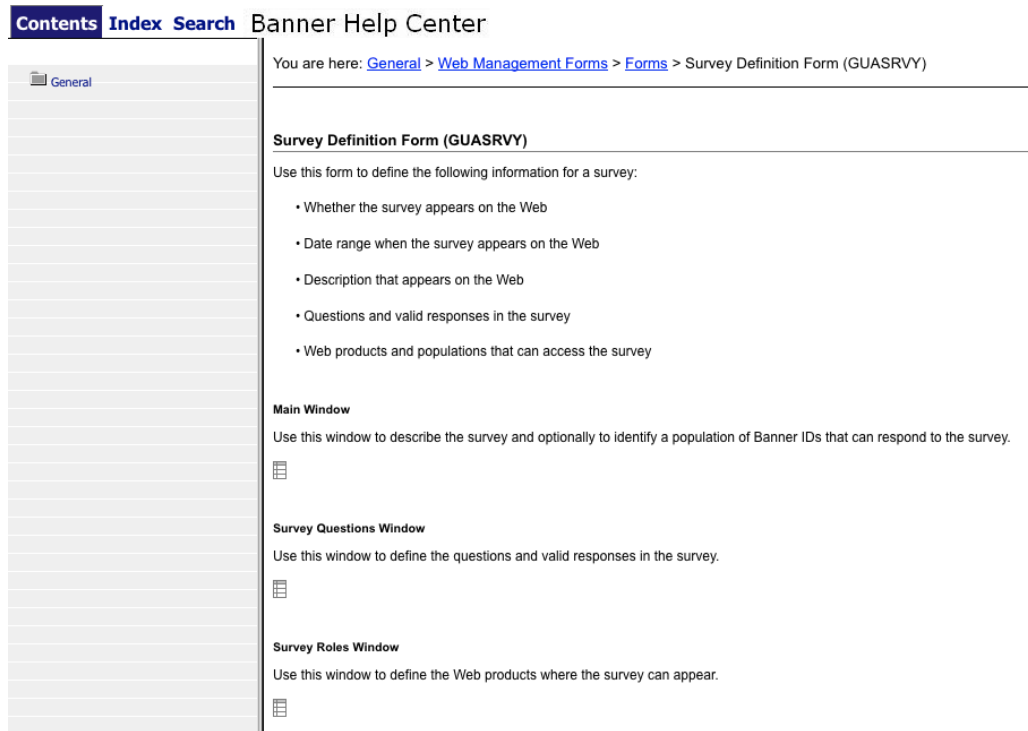
- Double-click any numeric field, or click the *Calculator* button.
- Use *Direct Access* to display the *Calculator Form* (GUACALC). When accessed the way the calculator works independently of any form or field. You cannot return a calculation to a form.
- Select Help>Calculator. When accessed this way the calculator works independently of any form or field. You cannot return a calculation to a form.

Online Help

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

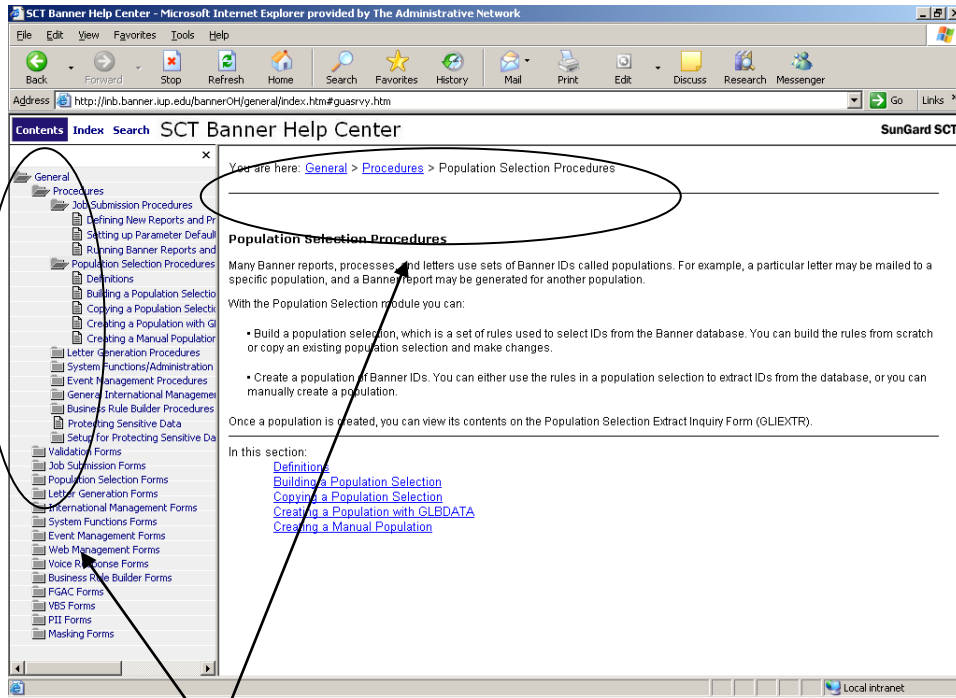
Accessing Online Help for a Form

When you access online help information about the current forms is displayed. From there you can browse to other topics within the help system or use the search and index features to look for specific topics.



Browsing for Topics

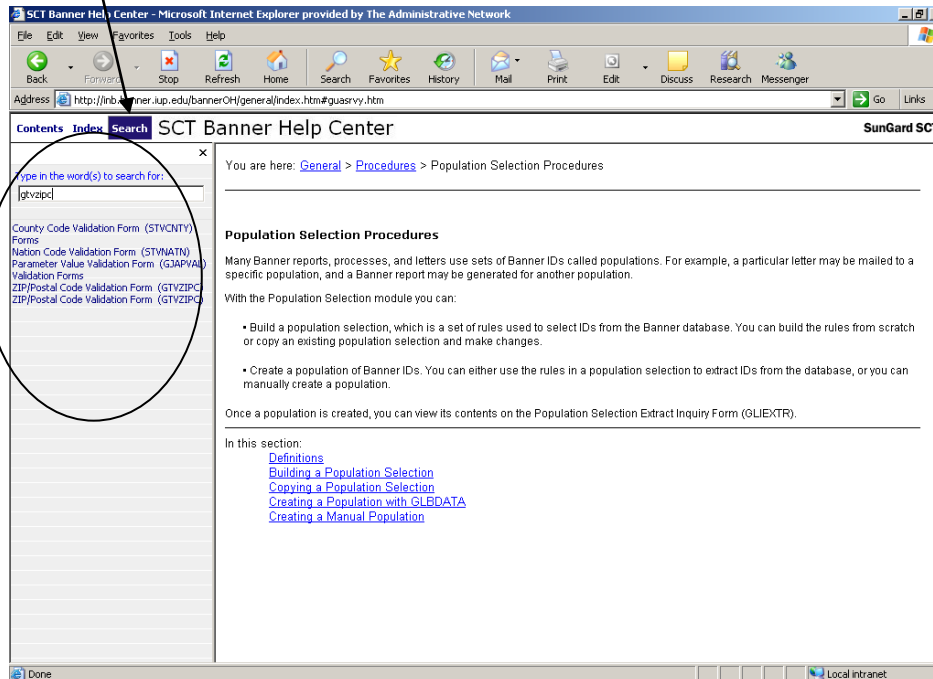
The Contents tab and the bread crumb trail both enable you to browse for topics categorically. Form and field is organized by Banner module. Task information is contained under the Procedures heading.



Browse with the Contents tab and bread crumb trail.

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.



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 on the closest alphabetical match.

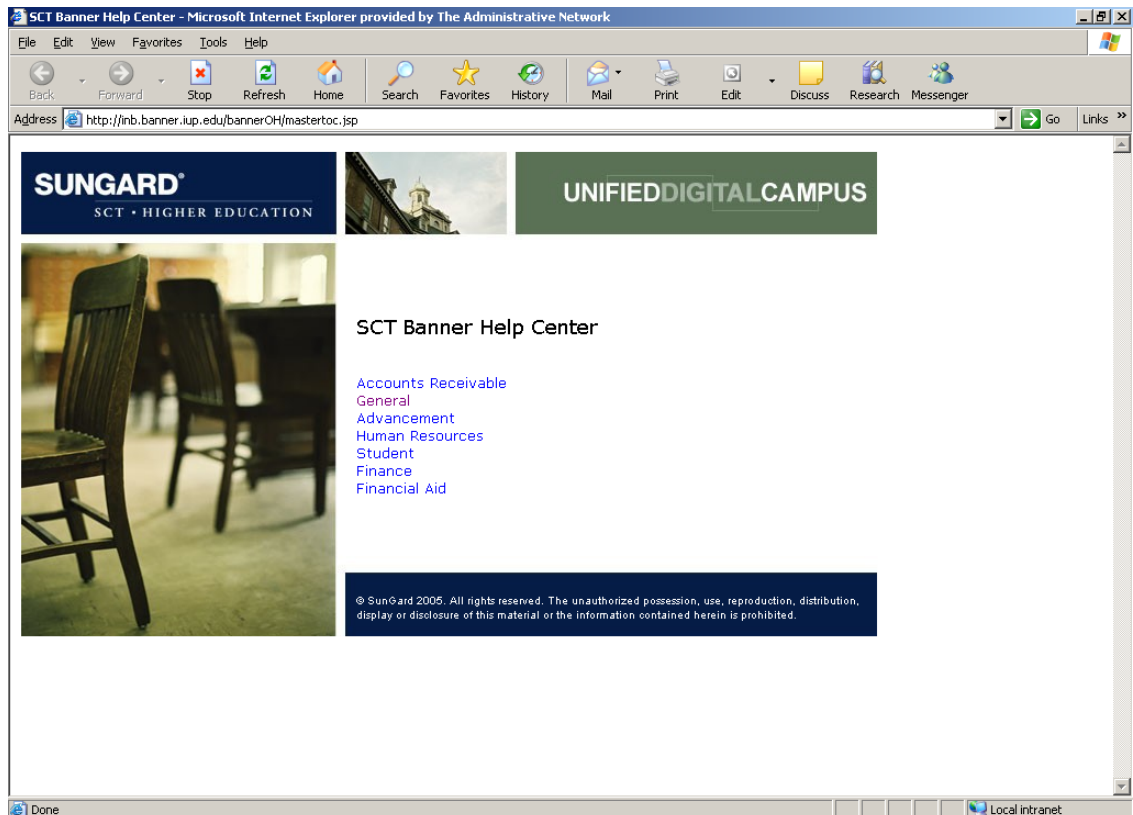
Using the Field Link

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

Accessing the Help Center

If you want information about forms and tasks for another Banner product use the Help Center link, which is available from the main menu of Banner or from anywhere within the help system.

From either the main menu or within the help system the Help Center appears.



BANNER DATA ENTRY TIPS:

Shortcuts for Entering Information

<i>Topic</i>	<i>Tip/Trick</i>
System date	In most date fields, entering a single, non-numeric character followed by Enter or Tab will display the current date. It's easy to remember <i>T</i> for <i>Today</i> , or <i>S</i> for <i>System Date</i> . Even special characters work for this shortcut. Forget what today's date is? Enter a question mark and Banner will tell you.
Dates within the current month	If you enter a two-digit number in a date field, Banner assumes the current month and year. For example, if the month is May and the year 2005, 10-MAY-05 has the shortcut <i>10</i> .
Dates within the current year	If you enter a four-digit number in a date field, Banner assumes the current year. For example, if the year is 2005, 15-JUN-2005 has the shortcut of <i>0615</i> .
Populating records on forms	After entering the SSN, click in the first enterable field, and the record will be populated. Note: This shortcut works for about 80% of forms. Remember that you proceed out of the key block by performing a Next Block function.
Shortcut to calendar or calculator	Double-clicking in a number or date field will display the calculator or calendar, respectively.
Enter <i>EXIT</i> to quit Banner	Enter <i>EXIT</i> in the Go To field on the main menu to end your Banner session.

Navigation Shortcuts from the Main Menu

Topic

Tip/Trick

Shortcuts in the Go To Field

Enter *SITE* to navigate to the site map.

Enter *TREE* to navigate from the site map to the product tree.

Enter *REFRESH* to:

- Refresh your personal menu (My Banner) after making changes on GUAUPRF
- Return to the Banner menu even if you are buried deep inside other menus
- Refresh the site map

Press the up or down arrow keys to navigate to any of the last 10 forms you accessed.

Enter the menu name to expand the menu.

Example: *GENJOB

Expands the General JOBSUB directory.

Enter *EXIT* to end your Banner session.

Enter the Quickflow name to automatically open the first form in the Quickflow.

Enter a job name and GJACPTL will open and run it.

Enter **PERSONAL* to open the My Banner menu.

Enter **MENU* to open the SCT Banner menu no matter where you are.

Creating Person and Non-Person ID's in Banner (Common Matching)

Overview

Creating a new General Person record – that is, entering information on a particular student, alumna/us, vendor, or organization into the system for the very first time – is a special case of data entry that requires special attention to detail in an effort NOT to create duplicate records for the same person, vendor, or organization.

Common Matching uses a rules-based algorithm to check for possible database matches before a new person or non-person record is added to the system

About the Process

- A Common Matching form can be called from the key blocks of person or non-person data entry forms when generating an ID or entering an ID that does not exist in Banner.
- Users may execute the common matching process at any time during data entry of person information from the Common Matching Entry form.
- If a matching record exists, users have the option to enhance existing data by inserting new information. Existing data will not be overwritten.

Matching Status

There are three possible results of running the Common Matching algorithm:

- New
- Match
- Potential Match

New: If no records are found to match the rules, a status of *New* is returned. You may then create a new person or non-person record or exit and return to the %IDEN form.

Match: If one and only one record matches the rules, a status of *Match* is returned and the **Match** tab will be highlighted. Data for the matched PIDM will be returned for review.

Potential Match: A status of *Potential Match* occurs if some fields match but not all, or if multiple records match exactly. For example, a potential match would occur if first name and last name match but DOB does not match. When potential matches exist, the **Potential Matches** tab will be highlighted with the number of potential matches and the records which were identified will be listed for review.

Using Common Matching

The Common Matching Entry Form (GOAMTCH) allows you to determine whether an entity (person or non-person) matches an existing record before it is entered into the database.

Always use the assigned Source code Matching Source

The banner form GOAMTCH will be called when a user tries to create a record on %IDEN forms. GOAMTCH will be called if an ID is entered that does not exist or if the **Generate ID** feature is used. If not called automatically, GOAMTCH can be accessed from the **Options** menu from the key block of %IDEN forms.



SEARCH FIRST! Before you create a new record for a person or organization, you must conduct an ID and/or name search to make sure that the person or organization has not already been entered into the database.

The presence of two records of information for what is really the same individual (a situation which you may hear referred to as “duplicate PIDMS”) can cause serious problems in the system. At the very least, this situation may cause you many hours of time and effort to undo once it is discovered, so it is better to take careful steps to avoid its happening in the first place!!

Search Standard

What Makes a Thorough Search?

1. **Search by successive levels:** Search by full or partial ID number if you have one, then all last names you may have for the individual; if necessary, search by last name *and* first name. Use the “sounds like” option if, for example, all you have is a semi-readable name and/or perhaps a memory of the way the name sounded when spoken over the telephone.
2. **Examine results carefully:** If your search yields any results – that is, if *some* records are displayed – carefully check each ID number, last name, first name, middle name, and birth date to determine if there is a full match with the individual you were searching for.
3. **Check for related information:** If your search displays a record which is suggestive of a match but not conclusive, highlight (put your cursor on) the likely record and select *Options/Search and Display More Detail* in the Menu Bar of the form. The address information may help you ascertain if you have a genuine match. If any matriculation information displays for the highlighted record then you know that this individual already has a record in the system.

If You Find the Record

If you are sure you have found an existing record that matches the individual for whom you were planning to create an Applicant or Student record, click on the **Select** icon (or double-click the ID number) and Update the record according to specified procedures.

If the Record DOES NOT Already Exist

If you are sure that you have NOT found a matching record after conducting a thorough search, then enter a new record following Reed’s specified procedures.

The various types/levels of search – ID, Last Name/First Name, Similar-sounding Names – are described in detail on the pages which follow.

ID Search

1. If you are about to create a *Person* record – starting at the APAIDEN form – enter the ID number. If a record already exists in the system, the name will immediately appear in the *Name* field, to the right of the ID number. Executing a **Next Block** command at this point will display further information.
2. If you only have a partial Identification Number (or are uncertain about part of it), click on the at the end of the name field and select **Person Search** to display the Person Search form (SOAIDEN).
3. Enter the numbers that you have in the *ID* field of the SOAIDEN form, with a wildcard (**% symbol**) **before and/or after** taking the place of any missing numbers. (See “Initiating an ID Number Search”, on the following page).

4. Click the **Execute Query** icon on the Toolbar (or click **Query/Execute**; or press **F8**).
(Results are shown on the next page).

Did You Get a “Hit”?


A. **YES**

If the record you were looking for is included in the displayed list, double-click on the number to bring the information back to the APAIDEN form.

B. **MAYBE**


If SOME records display, check the ID number, last name, first name, middle name, and birth date to determine if there is a match with the record you were planning to enter. You can also put your cursor on the likely record and select *Options/Search and Display More Detail* from the Menu bar of the form, to display the SOAIDNS Person Search Detail Form. The additional information there may help you ascertain if you have a genuine match.

C. **NO**

If NO records display, check the message bar at the bottom of the screen to see if any search problems occurred. If so, correct the problem if possible and search again. If no correctable problems are indicated, click the **Rollback** icon  ; then conduct a name search (from the APAIDEN form).

Name Search

This step must be performed for ALL of the names supplied by the person or organization to avoid creating a duplicate record into the system.

1. From the ID field in the Keyblock of APAIDEN, Tab to the *Name* field. Enter the name you are searching for (Last, First, Middle) using wildcards (%) as needed, and press **Tab** or **Enter**. If a record exists to match your query, the ID number and name will be returned to the form. If several records exist that are potential matches, an ID and Name Extended Search box appears. Click on the down arrow on the Search Results field to display the results. The number to the right of the down arrow represents the number of results of your search. Scroll through the results to determine if you have a match. If so, highlight the correct record and click. The ID and Name will be returned to the form.
2. Another search option from the APAIDEN form is to click , then **Person Search** to display the SOAIDEN form. Enter the first few characters of the last name –or whatever portion of it is known– into the *Last Name* field, with a % symbol before and/or after the given part taking the place of any number of missing letters.
3. The search function is case sensitive, so be certain to enter the name or parts of name using capital and lower case letters as appropriate – **and/or be sure to click on the “No” radio-button at the lower left corner of the Person Search Form to turn off the case sensitivity.**



Case Sensitive Query?

No Yes

4. Click the **Execute Query** icon on the Toolbar (or click **Query/Execute**; or press **F8**).

Did You Get the Expected Results (this time)?

A. YES

If you are certain that the record you were looking for is included in the displayed list, double-click on the ID Number of that record to select and retrieve it to the SPAIDEN form.

B. MAYBE

1. **If SOME records display**, check the ID number, last name, first name, middle name, and birth date to determine if there is a match with the record you were planning to enter. You can also put your cursor on the likely record and select *Options/Search and Display More Detail* from the Menu bar of the form, to display the SOAIDNS Person Search Detail Form. Then **Execute**

Query. The rest of the form will fill in, and the additional information there may help you ascertain if you have a genuine match. **Exit** the SOAIDNS form to redisplay SOAIDEN.

2. If the list of “matching” records is particularly long, you may want to search on both **Last Name** and **First Name** together to narrow it down.
3. If you think you have a genuine match, follow the instructions under “YES” above.
4. *If you’re not sure if you have a genuine match, select **Options/Search Using “Sounds Like”** (also called “Soundex Search”) from the Menu Bar on the form. Enter similar sounding Last Name and/or First Name in the appropriate “Sounds Like...” name fields. (Unlike other searches, the Soundex search function is not case sensitive.)*
5. Execute the search. (Press **F8**, click the **Execute Query** icon on the Toolbar, or etc.)

C. NO

If NO records display – or if some records display but you’re not sure there is a match with the application you have in hand – cancel the query (click the **Cancel Query** icon, select **Query/Cancel**; or press **Ctrl-q**). Press **F7** to start a new Query. Try searching also on any other last names you have for the individual, and/or variations of the name using wildcards and/or the **Search Using “Sounds Like”** option.

Search Using “Sounds Like” – Search by Similar Sounding Names

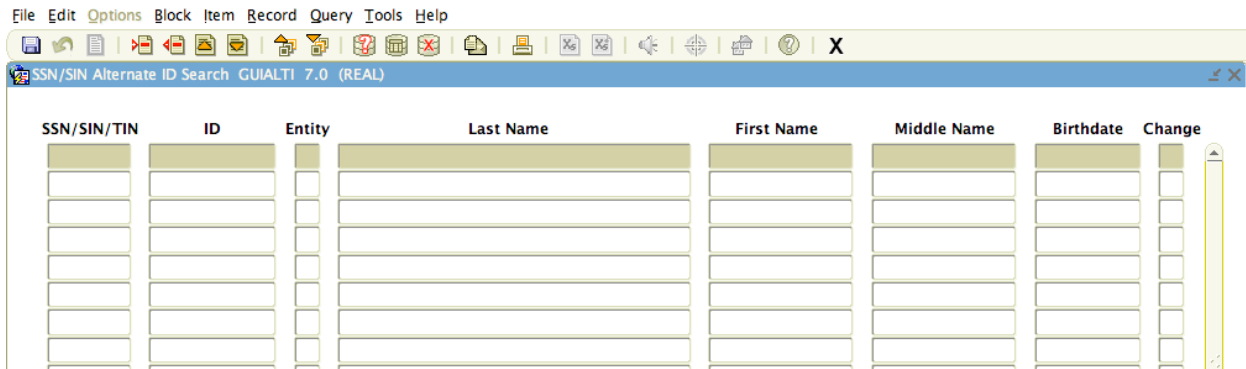
1. Still on the SOAIDEN screen, press **Ctrl-q** to cancel out of the ID and Name searching mode (as instructed on the auto hint line at the bottom of the screen).
2. Select **Options/Search Using “Sounds Like”** (also called “Soundex Search”) from the Menu Bar on the form. Enter similar sounding Last Name and/or First Name in the appropriate “Sounds Like...” name fields. (Unlike other searches, the Soundex search function is not case sensitive.)
3. Execute the search. (Press **F8**, click the **Execute Query** icon on the Toolbar, or etc.)

Search using Alternate ID

The SSN/SIN Alternate ID Search Form (GUIALTI) provides a way for you to find the Banner ID of a person or organization when you know one of the following items, or a portion of it:

- SSN (United States)
- SIN (Canada)
- TFN (organizations)
- Name
- Date of Birth

Did You Get the Expected Results (this time)?



If no matching records are displayed after you have exhausted all search possibilities, then Exit the Person Search Form (SOAIDEN), back to the Identification Form (APAIDEN), and you are able to enter a new record with the procedures established for REED.

SYSTEM REPORTS: PRODUCING AND PRINTING

In the system, reports are run through a process called Job Submission. If you know the name of the report, type it in the *Direct Access* field.

If you do not know the name of the report, the Job Submission form may be accessed directly by typing GJAPCTL in the *Direct Access* field.

Job Submission (GJAPCTL)

Process: Parameter Set:

Printer Control

Printer: Special Print: Lines: Submit Time:

Parameter Values

Number	Parameters	Values
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

Submission

Save Parameter Set as Name: Description: Hold Submit

GJAPCTL

If you do not know the name of the report, click on the down arrow after the Process field and query the form.

If you are looking for the Prospect Strategy Report, but cannot remember the title, the search might look like the following:

Process: Title: System:

Description: Type:

Printer: Lines Per Page: Special Print Stock:

Validation: Command: Activity Date:

Execute Query

Scroll through the results

The screenshot shows the 'Process Maintenance' window with the following data:

Process	Title	System	Description	Printer	Lines Per Page	Special Print Stock	Validation	Command	Activity Date
AFPTLF	Campaign Telefund Prospects	A	Telefund cards to support a telethon effort. Telefund cards can be produced for contacts within a campaign or for any po...		68				12-JUL-1993
AWRPSTR	Prospect Strategy Report	A	Prospect Strategy Detail/Pipeline Summary report		55	PORTRAIT			03-MAY-2007
SRREMAL	Electronic Prospect Email	S	Electronic Prospect Batch Email		55				06-DEC-2002
SRRPREL	Migrate Electronic Prospects	S	Migrate Electronic Prospects to Production Banner Tables		55				03-DEC-1999

Double click on the highlighted object to return to GJAPCTL with the object's name. Subsequent **Next Block** functions will move you through the various blocks.

Printer field

Each report requests a different set of parameter values.

Hints as to values

You can save different parameter sets of the same report

The screenshot shows the 'Process Submission Controls' window for 'AWRPSTR' (Prospect Strategy Report). It includes the following sections:

- Printer Control:** Printer: DATABASE, Special Print: PORTRAIT, Lines: 55, Submit Time: []
- Parameter Values:** A table with 8 rows of parameters and their values.

Number	Parameters	Values
01	Fiscal Year	2008
02	Prospect ID(s)	%
03	Primary Staff Assignment	%
04	Staff Assignment Type	PRIM
05	Prospect Rating TYPE Code	%
06	Prospect Rating CODE	%
07	Prospect Status	%
08	Report Format	D
- Submission:** Includes a checkbox for 'Save Parameter Set as', fields for 'Name' and 'Description', and radio buttons for 'Hold' and 'Submit'.

Double-click on the Printer field to view a list of system printers. Choose one or enter the word DATABASE. Entering DATABASE will allow you to view the report online, print or save it. Refer to the GJIREVO QuikSheet for instructions.

While entering parameters specific to each report, click to view a list of available values. Once all parameters have been entered, **Next Block** to go to the Submission Block.

To save this configuration of parameters, check the *Save Parameters* box and enter a name in the *As* field and a title. Click the *Submit* radio button and **Save** to submit the report. A dialog box informs you if the parameters are saved.

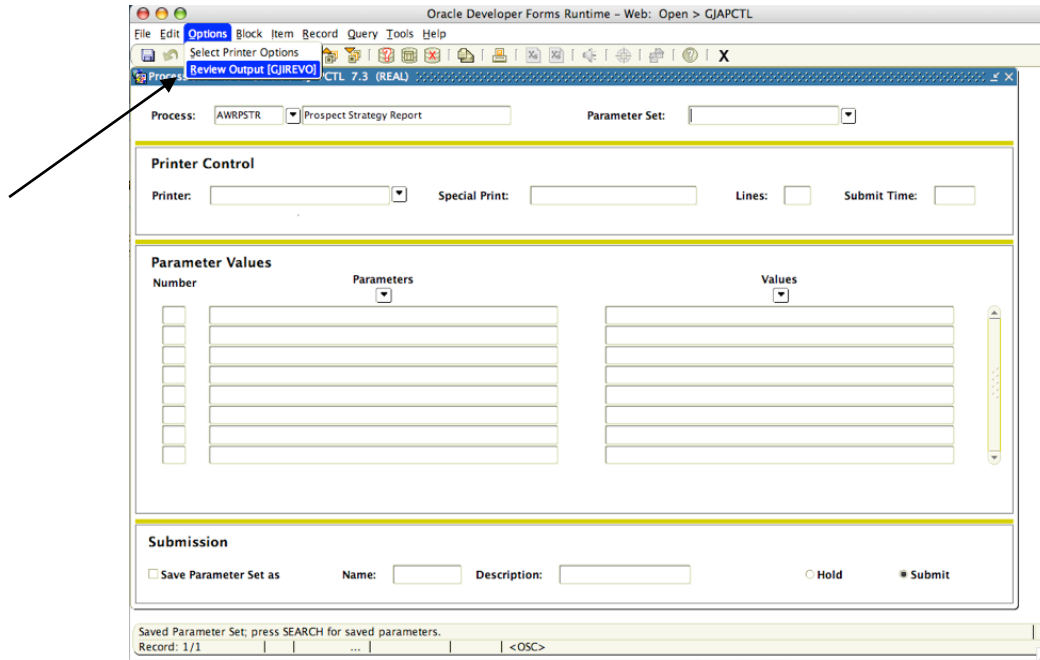
The next time you want to run this report, enter the name of the parameter set (in this case AWRPSTR) into the parameter field at the top right of GJAPCTL.

Save to File and, or Print from Web Browser:

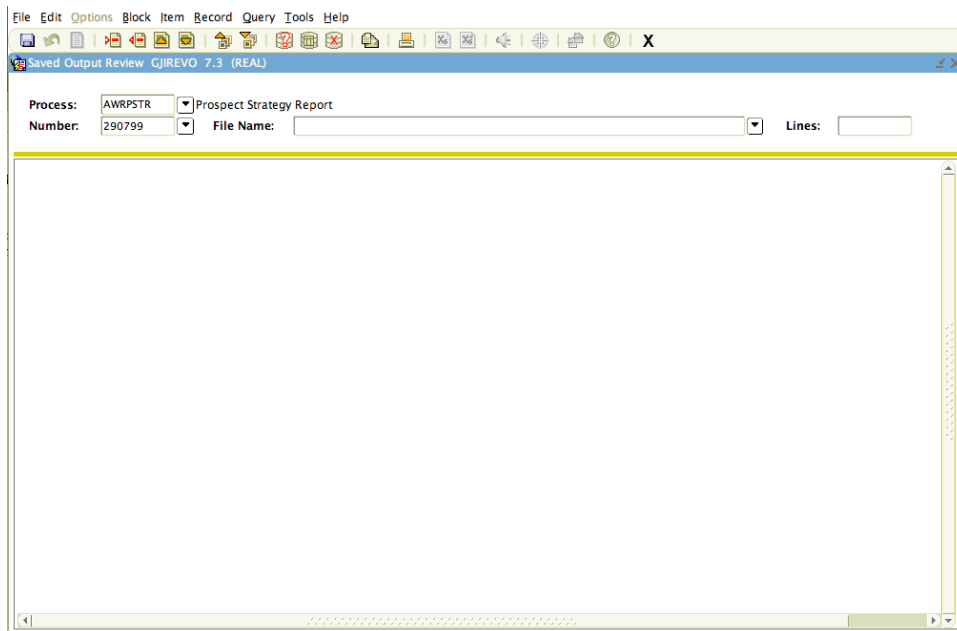
When you execute the job, the job submission output file will appear on the bottom left hand corner of the form.

The screenshot shows a web-based interface titled "Process Submission Controls GJAPCTL 7.3 (REAL)". At the top, there are fields for "Process:" (set to "AWRPSTR") and "Prospect Strategy Report", and a "Parameter Set:" dropdown menu. Below this is a "Printer Control" section with a "Printer:" dropdown, "Special Print:" text box, "Lines:" checkbox, and "Submit Time:" text box. The "Parameter Values" section contains a table with columns for "Number", "Parameters", and "Values", each with a dropdown arrow. The "Submission" section at the bottom has a "Save Parameter Set as" checkbox, "Name:" and "Description:" text boxes, and "Hold" and "Submit" radio buttons. At the very bottom, a status bar shows "Log file: awrpstr_295131.log" and "List file: awrpstr_295131.lis". An arrow points from the left margin to the "Log file" text.

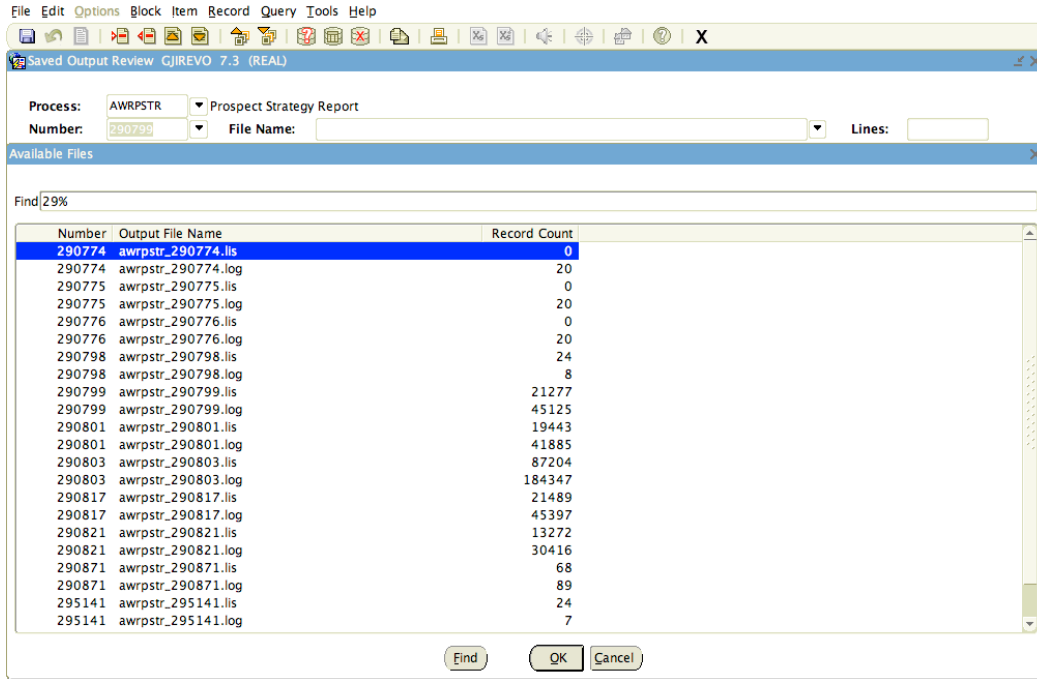
Use the Option Menu to select Review Output



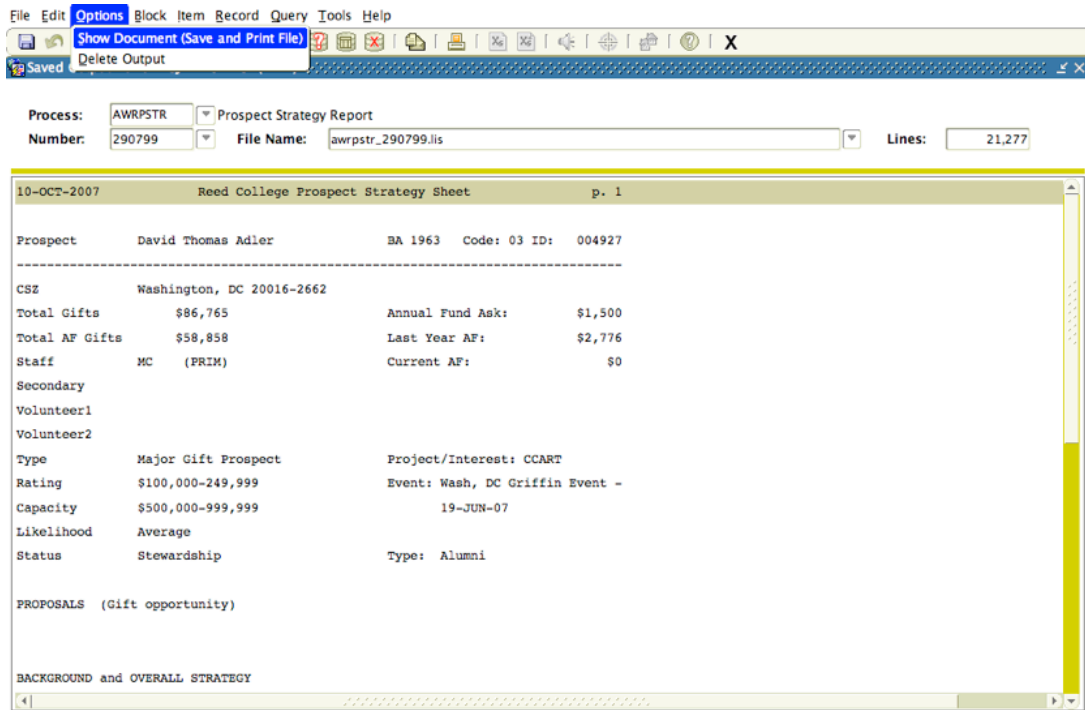
Click  and find the file number that appeared on the bottom of the job submission screen.



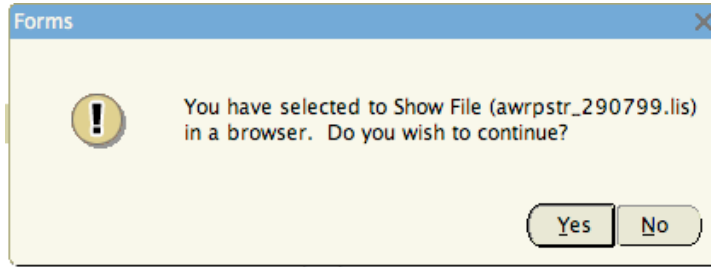
Double click the .lis file or highlight the .lis file and click OK.



Use the Option Menu to choose: “Show Document (Save and Print File)”.



The following dialog box will appear:



If this is the correct file, select “yes”.

Your report output will appear in a web browser. You may now save or print from this window.

To print from Web Browser:

Select “File”, “Print”.

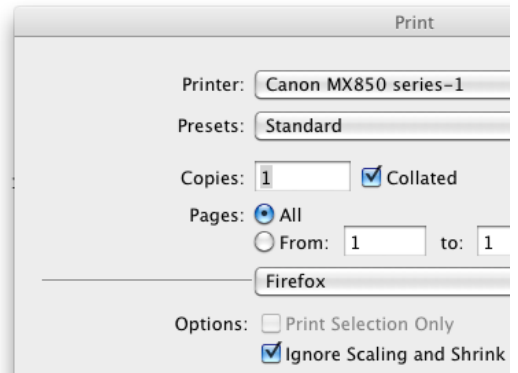
19-JUL-2010 04:20 PM Reed College PAGE 1
Assign Annual Fund Ask Amounts AWPASK2

Campaign Contact Records Deleted: 36783
Campaign Contact Records Rolled: 808
Campaign Contact Records Added: 36019

Special Purpose Records Deleted: 36783
Special Purpose Records Rolled: 808
Special Purpose Records Added: 36019

* * * REPORT CONTROL :

PROCESS: AWPASK2
PARAMETER SEQUENCE NUMBER: 421354
Fiscal Year: 2011
Override Manual?:R
Donor Codes: 0001 PCR1 PAL1 PCR5 0002 0004
Comment 2011 AF Asks
Excluded Prospect Status Codes: NONE
Application: AFWMT

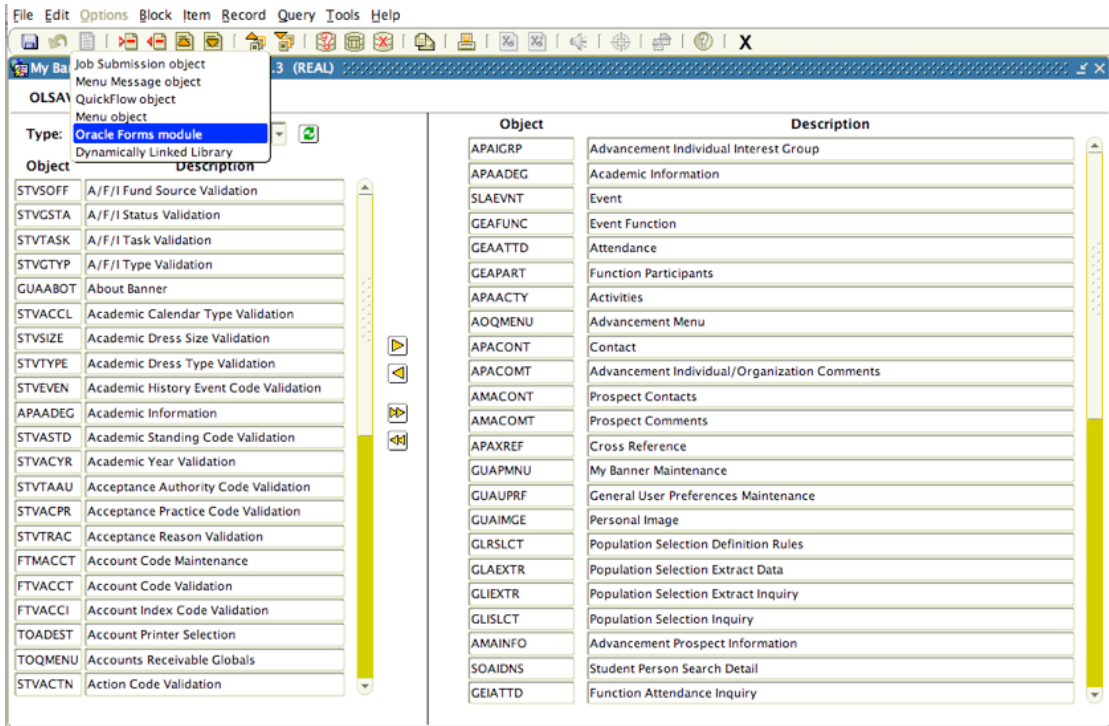




PERSONAL MENUS

To make navigation easier for an individual user, personal menus can be set up using the Personal Menu Maintenance Form (GUAPMNU)

To create your own Personal menu, called My Banner, do the following.

1. Access the Personal Menu Maintenance Form (GUAPMNU)
2. Use the pull-down list above the left pane to select the object type you want to query. The left pane lists the objects of the selected type.



3. Scroll through the objects in the left pane to find what you are looking for. Or, with cursor in left pane, do **Enter Query**, enter search criteria with wildcards, and **Execute Query** to search for a specific object.
4. Select objects to add to My Banner and click  To add all matches to the menu (if there are 20 matches or less), click in the right pane where you want to place the new menu items. Then click 
5. Click **Save**.

KEYSTROKE CONVERSION

Commands can be executed by clicking an icon, using the menu bar, or using a combination of keystrokes. The following table serves to provide a comparison between the Icons, Menu, and Keystrokes.

Please refer to the separate document “Banner™ Commands”.

EXTRACTING DATA TO A SPREADSHEET

You can extract data from *selected* forms to use in a spreadsheet. You can extract detail data from a current block with or without data from the key block (depending on how the specific form has been set up). Once data is in a spreadsheet, one can easily format, sort, and report.

Ellucian delivers the extract feature on **all validation** forms. Ellucian also supports the extract feature on a limited number of rule, application, and inquiry forms where the feature has been tested.

This feature has been tested on the following Student forms:

Extract details with or without key data	Extract details only
SFARCTT	SFAREGQ
SFASLST	SHACRMQ
SHACRSE	SLABQRY
SIAASGQ	SLQEVNT
SOAHOLD	SMACACT
SOAXREF	SOAATRM
SRASUMI	SOACCOL

This feature has been tested on the following General and common forms:

Extract details with or without key data	Extract details only
GJAPDEF	GJAJOBS
GLAEXTR	GLIOBJT
GLIEXTR	GOAADRL
GLISLCT	GUAOBS
GLIVRBL	SLABQRY
GUALETR	SLQEVNT
GUAOPTM	
GUAPARA	
GUIMAIL	
SOAHOLD	

Your system administrator can use the Object Maintenance Form (GUAOBS) to enable the extract feature on any form where the extract has been tested.

You can tell that the extract feature is enabled on a specific form if one or both of the following options are enabled in the Help pull-down menu for the form:

- **Extract Data with Key.** Extracts details in the current block with key data.
- **Extract Data No Key.** Extracts details in the current block without key data.

ADDRESS REVIEW AND VERIFICATION FORM (GOAADDR)

Use this form to display addresses added or changed within Banner or via the Web. You can display all new and changed addresses, or you can limit the view based on a user, date range, and/or source. You cannot add or delete an address with this form, but you can update address information.

The screenshot shows the 'Address Review and Verification GOAADDR 7.0 (REAL)' web application. The interface includes a menu bar (File, Edit, Options, Block, Item, Record, Query, Tools, Help) and a toolbar with various icons. The main form area is divided into several sections:

- Search Filters:**
 - User ID: OLSAVA
 - Source: [Dropdown]
 - Activity Date Search From: [Calendar]
 - To: [Calendar]
 - Not Reviewed
 - Reviewed
- Address Details:**
 - ID: V52483 Reviewed
 - Name: Ms. Alison T. Olsav
 - By: [Text Field]
 - From Date: [Calendar]
 - To Date: [Calendar]
 - Inactivate Address
 - Address Type: ZY Temporary Reed Office
 - Sequence Number: 1
 - Source: [Dropdown]
 - Street Line 1: GW14
 - Street Line 2: [Text Field]
 - Street Line 3: [Text Field]
 - City: Portland
 - State or Province: [Dropdown]
 - Delivery Point:
 - Correction Digit: [Text Field]
 - Carrier Route: [Text Field]
 - ZIP or Postal Code: [Dropdown]
 - County: [Dropdown]
 - Nation: RCO Reed College Organization
 - Telephone Type: ZY
 - Telephone: 503 7886634 6634
- Last Update:**
 - User: OLSAVA
 - Activity Date: 26-OCT-2007

HELP!

Banner has several kinds of help that can give you immediate online assistance:

- **Online Help.** This is the new online information for Banner forms, windows, blocks, and fields. It is currently available for selected forms only. Where it is available, it is the first item on the *Help* pull-down menu. Otherwise it may be grayed out.
- **Dynamic Help.** This is the traditional help for Banner forms, blocks, and fields. Ellucian is gradually replacing Banner Dynamic Help with Online Help.
- **Banner Bookshelf.** To view the detailed Ellucian documentation, along with other CRIS-created documentation, access the CRIS intranet site and click on Information Systems/Documentation/Banner Documentation/Banner Basic Documentation.
- **Help (Item Properties).** This list shows all the properties of the field where the cursor is currently located.
- **Show Keys.** This list shows the Oracle functions and associated keystrokes available in your environment for the field, window, and form where the cursor is currently located.