Welcome to Banner Training

Navigation - 6.x

National-Louis University / COLLEGIS
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## Banner Navigational Training

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Navigation 1
Scope of Banner 6X at NLU

Banner 6X System

Self Service for Student & Faculty

Student

Financial Aid

Alumni Development

Accounts Receivable

General

Human Resources

Finance

Self Service Employee
Initial Logon - Application Install

Banner 6X is internet native, while Banner 5X was client-sever based. In 5X you had to access Banner via Citrix, now with Banner 6X you don’t need to use Citrix, rather you simply access it like any other web application, by its URL.

1 - Open web browser and go to this URL
www.nl.edu/banner6 or for Mac users www.nl.edu/banner6mac

2 - The first time you access Banner 6X in this way an application will download and will need to be installed on your computer. Click “Yes” to allow the install

These instructions with screen prints are for Microsoft Internet Explorer.

For information on NetScape, contact the OIT helpdesk.

3 - Click “Next” for Destination Folder

4 - Click “OK” when installation is complete
Logon

1 - Open web browser and go to this URL:

www.nl.edu/banner

or for Mac users, www.nl.edu/bannermac

Note, these URLs will not be operational until February 9, 2004

2 - Logon to Banner with your username and password.
Please note that the Banner Logon is not case sensitive.

Database can be left blank.
Banner Environment

Direct Access lets you go to a specific form.

Menu bar
Title bar
Toolbar
Auto hint
Status line

Navigation 5
Banner Password Change Form
(GUAPSWD)

Use this form to change your Banner password.
Your new password becomes effective when you exit and re-enter Banner.

Oracle User ID = your Banner Logon ID
Oracle Password = your current Logon password
Database can be left blank
Parts of a Form

Field - A field is an individual item on a form, such as Last name or First Name

Record - A record is a collection of fields within a block
NAVIGATION
(Button and Menus)

Buttons

Menus

Buttons on the Main Menu

Three buttons are available from the main menu:

View/send messages
Displays the site map

Displays the hierarchical tree menu

Navigation
You can also use your mouse to navigate.
- Click on the field you want to go to.
- Click and drag on the scroll bar to move between records.
- Click in a check box to activate it.
ID/Name Search

Enter complete ID or hit tab and
Enter complete Name
- Name must be in format, last, first, middle
  - Ex: smith, jon
  - Ex: Doe, Jane, Marie

(Note: This search is not case sensitive, and spaces are optional after commas. Search can be done in any form with ID field.)
ID/Name Search Cont.

Partial ID or Name can be entered using wild cards

\[%\] = Multiple characters

\[_\] = Single character

**Ex.** 324\% To search for ID's that start with 324

**Ex.** Smith,J\% All Smith’s with first name starting with J

**Ex.** %ith%,Joe Any one with the first name of Joe who has “ith” in their last name.

**Ex.** Smith,J_e Any Smith with J something e for a first name.

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

Previous names and IDs are indented in drop down list..

Select drop down box to see results.

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

Click here to view detailed list

Refine your search by entering values here and pressing the search button.

EXIT
ID/Name Search Cont.

Alternate search, click Magnifying Glass to begin.

Then click person or non-person search.

Select person and click ‘Search and Display More Detail’ in Options to get more detail.(next page)

Enter parameters to search on and press f8 or execute query button.

Double click on person you want to select.

Watch for hints to help you.
ID/Name Search Cont.

SOAIDNS - Person Search Detail Form

Upon entering form, press Ctrl+F11 to execute query and then review detailed information to make selection of appropriate person you are searching for.
SPAIDEN - Identification form - Address information

Upon entering form do a 'next-block' three times, or do a 'next-block' once and select 'Addresses' in the pull-down options menu.

Note that an address can be made inactive by checking 'inactive' button, by having a 'to' date before the current date, and by having a future 'from' date.

Scroll through multiple addresses using arrow keys or scroll bar.

Reminder: Do not use # signs in the address.

When entering a new address and there is already an address for that type, make sure to enter yesterday's date in the 'to' field of the old address, or the date prior to the 'from' of the new address. No gaps or overlaps of dates should exist for addresses.
Addresses Cont.

**SOADDRQ** - Address Summary Form

Upon entering form enter ID and do a 'next-block' to view a summary of a person's addresses. Addresses cannot be updated from this form. To update addresses go to SPAIDEN, or click on 'Add/Change Address Detail' in the pull-down options menu.
Phone Numbers
SPAIDEN / SPATELE

**SPAIDEN** - Identification form - Address/telephone information

Upon entering form do a ‘next-block’ three times, or do a ‘next-block’ once and select ‘Addresses’ in the pull-down options menu.

If a telephone number is associated with an address and is indicated as the primary phone for that address on SPATELE, it will appear here.

Search for other telephone numbers by clicking the magnifying glass.
SPATELE - Telephone form

Upon entering form do a 'next-block' to view all of the telephone numbers. Changes can be made from this form.

International phone numbers can be entered on this form by entering the international access number here and the remainder of the number in the number fields.

Primary indicator (one per associated address type.)
Email Addresses

GOAEMAL

GOAEMAL - Email Address Form

Upon entering form input ID number and do a 'next-block' to view email address information

The email form can also be accessed by clicking on 'Email Addresses GOAEMAL' in the pull-down options menu when you are in the address area of SPAIDEN, or when you are in the telephone form SPATELE.

Double click to select a type until you are familiar with them

Select ‘Preferred’ if this is the person’s preferred email address. Only one email address can be selected as preferred.

Comments may be entered about the email or web address
Object Naming Convention

**Position 1** - Identifies the primary system owning the form, report, job, or table.

**Position 2** - Identifies the module owning the form, report, job, or table.

**Position 3** - Identifies the type of form, report, job, or table.

**Positions 4, 5, 6, and 7** - Uniquely identifies the form, report, job, or table.

Ex:  
- **S** - Student system
- **P** - Person module
- **A** - Application, input or update form
- **I** - Identification
- **D**
- **E**
- **N**

Ex:  
- **G** - General system
- **U** - Utility module
- **A** - Application, input or update form
- **P**
- **S**
- **W**
- **D**
GUIOBS - This form allows you to search for an object such as a form or a report.

Double click in the Direct Access box, or type GUIOBS and hit enter.

Enter parameters to search on. Wildcards may be used.

Select type of object to search for from drop-down menu.

Execute query by pressing Ctrl+F11 or clicking ‘execute query’ button.

Double click object to select it.
**Job Submission**

**GJAPCTL**

**GJAPCTL** - Through this form, jobs, reports, and processes can be run.

Enter name of job, report, or process and go to next block.

Enter printer to sent output to, or enter DATABASE to review output online.

Enter values for the parameters.

An explanation of the parameter your cursor is on will appear here.

Click ‘Save Parameters’

To review output sent to DATABASE, select ‘review output’ in the pull-down options menu.

Click ‘submit’ and then save and note job name and number.

Navigation 21
Review of Job Output

GJIREVO - Saved Output Review Form

Through this form you can view the results of your jobs submitted through Job Submission (GJAPCTL) where you entered 'DATABASE' for the printer.

Select Process, Number, and File Name of the file you want to display.

Double click in this field to see a list of files.

Click ‘Show Document (Save and Print File)’ to save the file. Review file and then save in the location you want, with the file name you want as a .txt file type.