

Banner General Quick Reference

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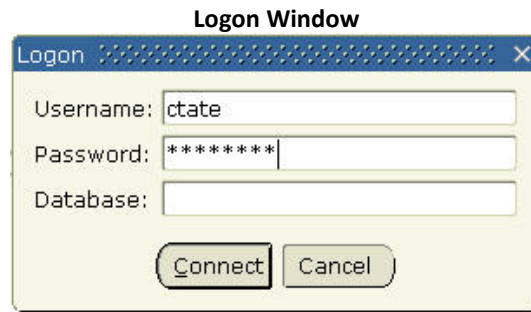
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Logon

- Open Internet Explorer
- In Address field enter the following URL:
<http://www.siu.edu/its/banner>
- Select appropriate Banner link (Mac/PC)
- **Username** – Key in your username (e-id)
- **Password** – Key in e-id password
- **Database** – Leave blank
- Click **Connect** or press Enter
 - The Banner Main Menu will open



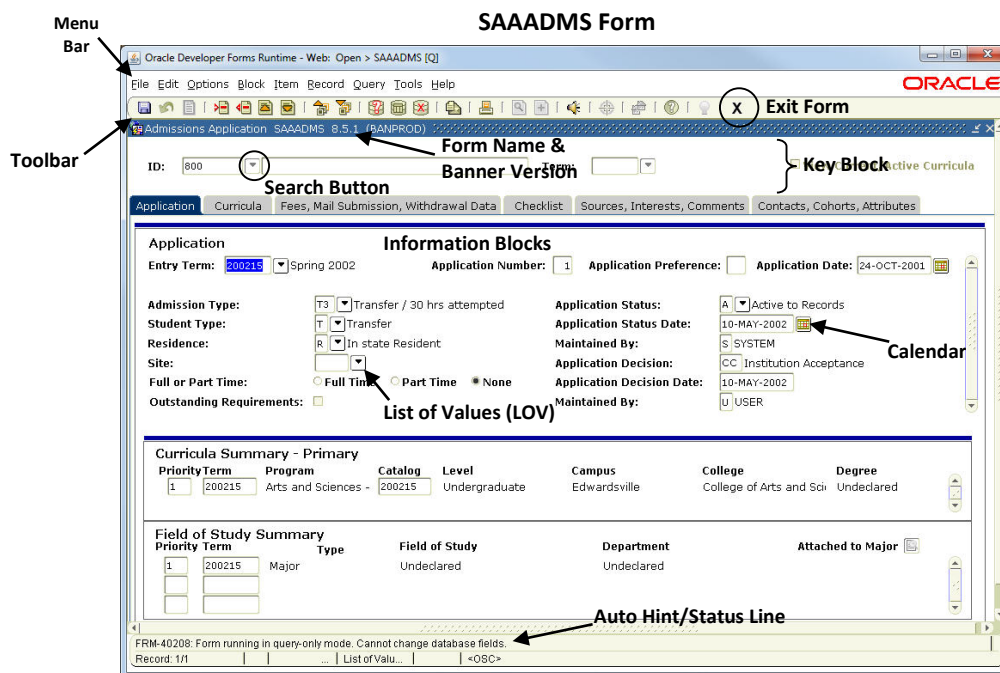
Password Change

Your password to Banner is maintained as you manage your e-ID password. You will never change your password from within Banner.

Initial Logon

- Do not attempt to log into Banner until you have received an email from ITS Production Control
- After you have attended training and submitted a completed System Access Request Form (SARF) you will receive an email from ITS Production Control with instructions for you initial log in
- Email oitacts@siue.edu:
 - If email not received after 2 business days of forwarding your SARF to Production Control
 - If your account is locked

Banner Form Example



List of Values (LOV)

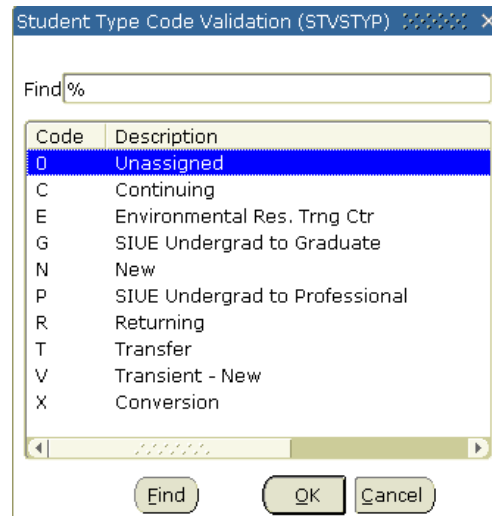
Using List of Values to Populate Field

- (Search) indicates the field has **List of Values**
 - Click on (Search) to open list
 - If an **Option List** opens click to select appropriate option
 - Some LOV are not available in query mode
 - Double click on the desired value

Shorten the LOV

- Click before or after the **% sign** (wild card) and enter a letter or string of letters
 - Use the % sign in any position
 - Use more than one % if appropriate
- Click the button
- Double click on the desired value
 - The list closes and field populates with the value

Address Type LOV



My Banner

Create a personalized menu that fits your needs. Customize with frequently used Objects (Forms, Menus and QuickFlows).

Create My Banner Menu

- Key **GUAPMNU** in the **Object Search** field on the Banner Main Menu
 - Press **Enter**
 - This opens the My Banner Maintenance form
- By default, cursor should be in Object column of Personal Menu

Note: Order of objects in My Banner will be in the order that objects were entered.
- **Object**– Key in desired object name
- **Description** – Can be changed (optional)
 - Changed description is only shown in My Banner
- To add additional objects:
 - Press Down (arrow)
 - Key in object name
 - Key in new description (optional)
 - Repeat until all objects are added

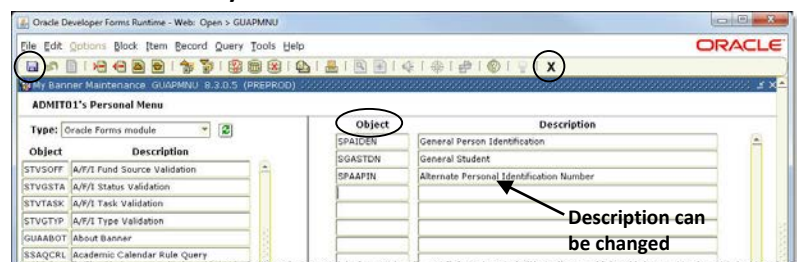
- Click (Save)
- Click (Exit) to close form and return to Banner Main Menu

Note: Changes to My Banner will not show on Main Menu until the next login to Banner

Banner Main Menu



My Banner Maintenance GUAPMNU



Modify My Banner

- Key **GUAPMNU** in the **Object Search** field on the Banner Main Menu
 - Press **Enter**

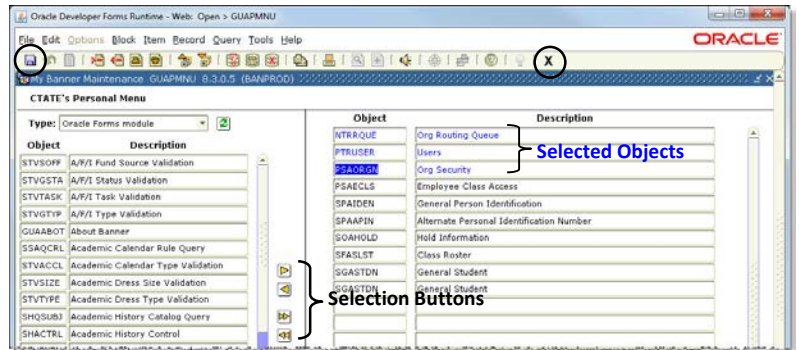
Add Objects

- Follow procedure for **Create My Banner Menu**

Delete Objects

- Double click on object(s) to select to remove from Personal Menu (right side)
 - Text color will change to **blue**
- Click (Remove) to remove selected object(s)
- **OR** click (Remove All) to remove **all** objects from Personal Menu
- Click (Save)
- Click (Exit) to close form and return to Banner Main Menu

My Banner Maintenance GUAPMNU



Preferences

- Select **File** (Menu Bar), **Preferences**
- Use Preferences settings to view form name [XXXXXXX] in menus and set other display options

Display Options

- Click Display Options tab

Display Options Block

- Check boxes:
 - Display Form Name on Title Bar
 - Display Form Name on Menu
 - Display Release Number on Title Bar
 - Database Instance on Title Bar

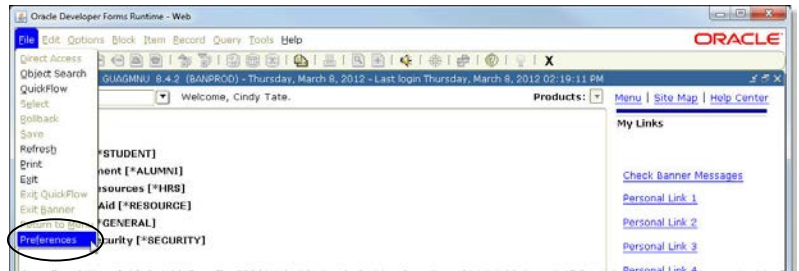
Alert Options

- Check boxes (optional):
 - **Prompt Before Exiting Banner** (If box not checked, will close Banner without any warning)
 - Display Additional Confidential Warning
 - Display Additional Deceased Warning
 - **Display Duplicate SSN/SIN/TIN Warning** (If you are responsible for data entry to create/update person information)

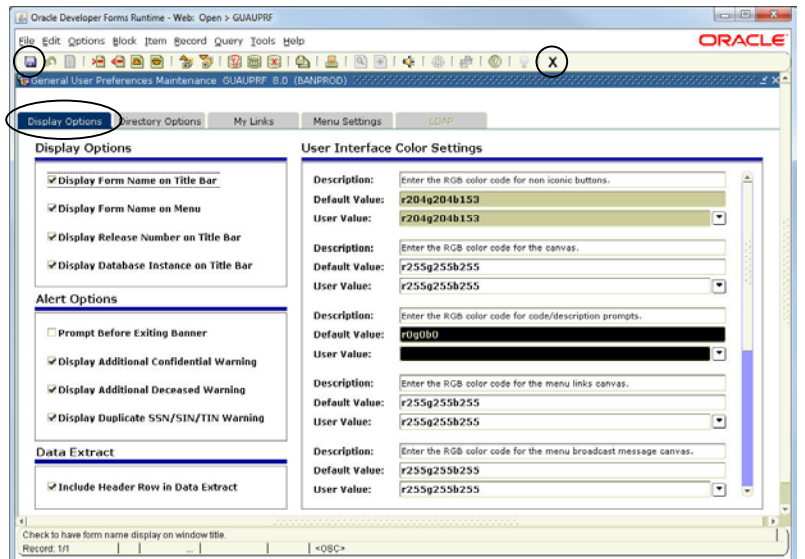
Data Extract

- Check box for **Include Header Row in Data Extract**
- Click (Save)
- Click (Exit) to close form and return to Banner Main Menu

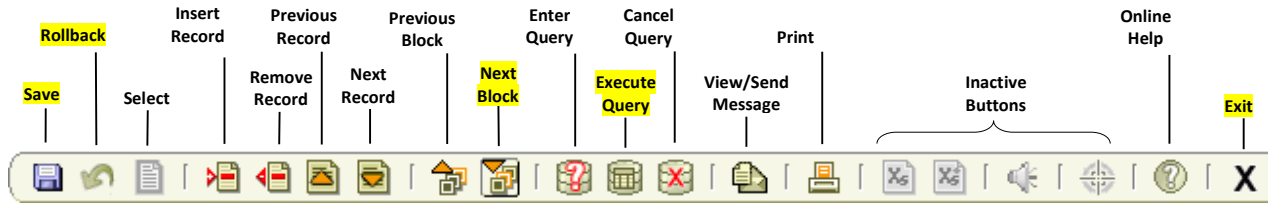
Banner Main Menu GUAGMNU File Menu



General User Preferences Maintenance GUAUPRF



Form Toolbar



- (F10) – Save:** Save data entered or changed
- (Shift+F7) – Rollback:** Returns to Key Block
- Select:** Select data to return to Key Block or data field from search/query
- Insert Record:** Add record to Information Block
- Remove Record:** Permanently remove a record
- Previous Record:** Returns to previous record viewed (if more than one)
- Next Record:** Goes to next available record (if more than one)
- (Ctrl+PageUp) – Previous Block:** Returns to previous Information Block viewed
- (Ctrl+PageDown) – Next Block:** Goes to next available Information Block
- (F7) – Enter Query:** Enter data to query on
- (F8) – Execute Query:** Returns data that matches query
- Cancel Query:** Query/search is cancelled and returned to original form
- View/Send Message:** Send messages to and receive messages from other Banner user, if appropriate security
- Print:** Print form
- Online Help:** Opens online help, if available
- (Ctrl+Q) – Exit:** Exit form or Banner

Note: Shortcut keys listed in brackets where available.

Shortcut Keys

For menu items not available on the toolbar.

Clear Block	Shift+F5
Clear Field	Ctrl+U
Clear Record	Shift+F4
Count Query Hits	Shift+F2
Display Error	Shift+F1
Duplicate Field/Item	F3
Edit	Ctrl+E
Help (Item Properties)	Ctrl+H
List	F9
List Tab Pages	F2
Previous Field	Shift+Tab
Show Keys	Ctrl+F1
Update Record	Ctrl+F2

Name Search

Open Form

- Key in the desired form name in the **Object Search Field (Go To...)** on the Banner Main Menu
 - Press **Enter**

Open Query Form

Note: If the University ID is known, key it in the ID field and press Enter.

- In the **Key Block** of your form, click (Search)
- Select search from the Option List (if it appears)
 - Person Search (SOAIDEN)
 - Alternate ID Search (GUIALTI)

Query for a Person

- Key in known criteria (Last Name, First Name) in the appropriate field
- Use the % wildcard in any position (Ha%). (Always use the % when including a middle name or initial)
- Click (Execute Query) to retrieve match(s)

No Results

- The **Auto Hint/Status Line** says: "Query caused no records to be retrieved. Re-enter."
- Click (Cancel Query)
- Click (Enter Query) to remove criteria from field
- Enter new criteria and click (Execute Query)

Select a Record

- If necessary use the (Down Arrow) or (Up Arrow) key to position the cursor in the appropriate line
- Click (Select)
 - The Key Block on the calling form will populate and the Query form will close

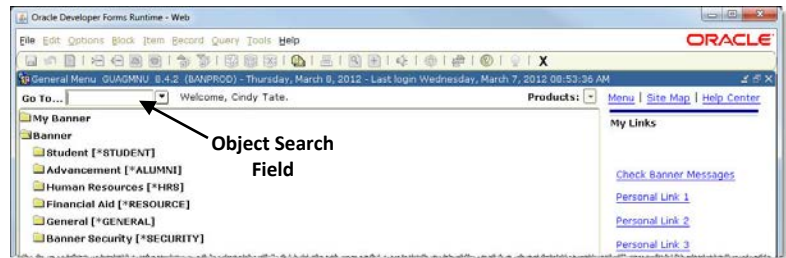
Move to Information Block

- To view record data, click (Next Block) to move from the **Key Block** to the **Information Block** of the form
- To return to the **Key Block** to select search for another record, click (Rollback)

Exit Query form without Retrieving a Record

- Click (Exit) **twice** to close form and return to the calling form

Banner Main Menu



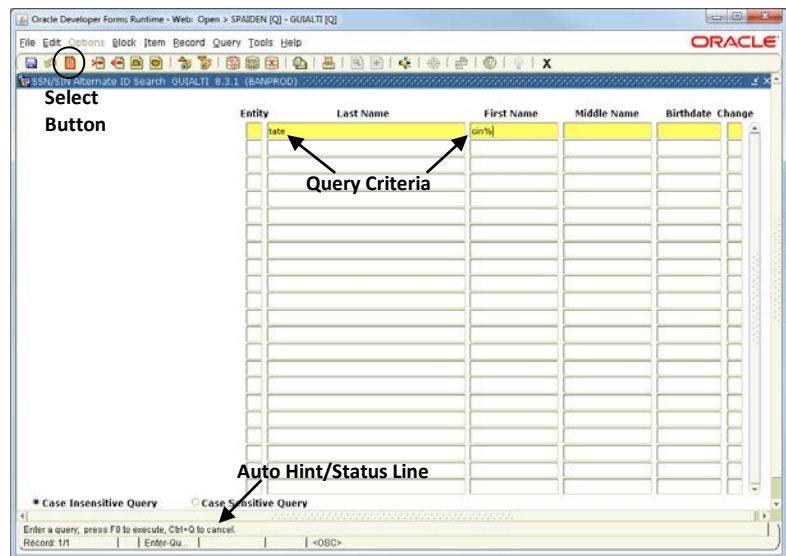
General Personal Identification SPAIDEN



Option List



Alternate ID Search GUIALTI



Person Search SOAIDEN



Extract Banner Data into Excel

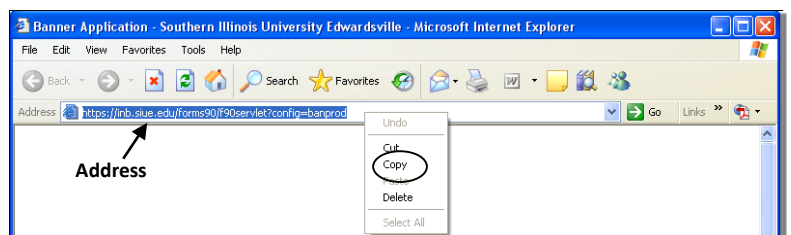
Internet Explorer Setup

- Open Internet Explorer
- Open Banner Production
 - Two new windows will open:
 - Banner Application window – runs in the background
 - Oracle Developer Forms window – Banner forms
- Do **not** login to Banner at this time
- From the task bar (bottom of screen), select **Banner Application** window
- Copy Banner web address
 - Highlight the Address
 - Click the right mouse button
 - Select **Copy**

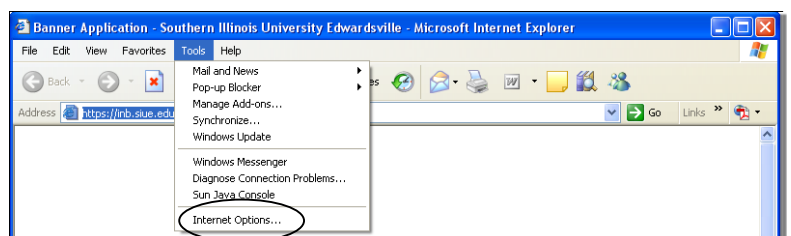
Task Bar



Banner Application Window



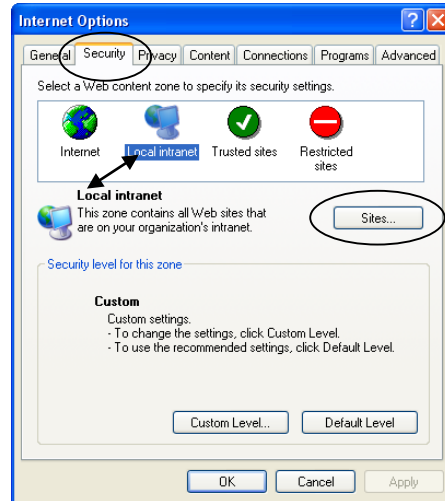
IE Tools Menu



- Select **Tools** (Menu bar), **Internet Options....**

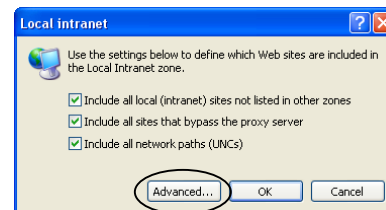
Internet Options Security Tab

- Click on **Security** tab
- Click on **Local intranet** icon
- Click



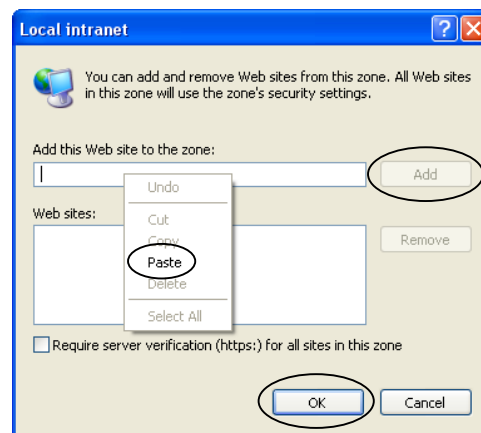
- Click **Advanced...**

Local Intranet Settings



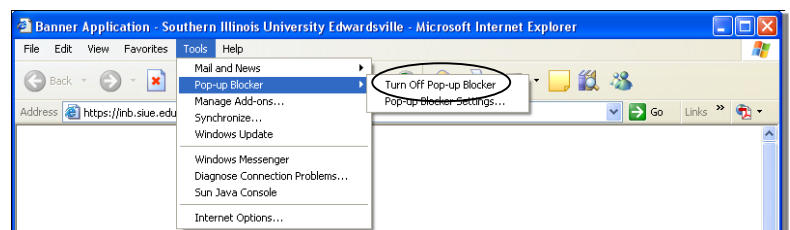
- With cursor in **Add this Web site to the zone:** field, click the right mouse button
- Select **Paste**
- Click **Add**
- Web site will be listed in **Web sites:** field
- Click **OK** three times

Local Intranet Web Sites



- Select **Tools** (Menu bar), **Pop-up Blocker**
- Select **Turn Off Pop-up Blocker**
- If Yahoo or Google toolbars have been installed, these should be uninstalled for best results

Banner Applications Window



Banner Setup

- From the task bar (bottom of screen), select **Oracle Developer** window
- Logon to Banner
- Verify that Include Header Row in Data Extract has been checked in **Preferences** (Page 7)









Extract Data

- Retrieve data to be extracted
- Click **Help** (Menu bar), **Extract Data with Key** or **Extract Data No Key**
 - Extract Data with Key includes information entered into the Key Block
 - Does not extract field names (column headings). i.e.; First column is University ID, then Last Name, First Name, etc
- Select '**Open in Excel**' if asked
- Save file to PC
 - Work with file as needed outside of Banner

NOTE: EXTRACT DOES NOT WORK. If after turning off pop-up blockers and adding the web site to the Intranet zone and cannot extract to Excel, call the Help Desk at ext. 5500 for further assistance. Remember, not all data can be extracted from Banner (the menu option will not be active from the Help menu).





Student Extract Examples

Class Roster SFASLST

- Key in **SFASLST** in the **Object Search Field (Go To...)** on Banner Main Menu
 - Press **Enter**
- **Term** – Key in term
- Key in course reference number in the **CRN** field if known
 - Search for CRN
 - Click  (Search) for **CRN** and select **Search for Sections (SFQSECM)**
 - Click in the **Subject** field and key in subject
 - Click in the **Section** field and key in '>0' (zero sections are not used to schedule classes)
 - Key in other search criteria as needed and click  (Execute Query)
 - Double click on appropriate section to close query and populate CRN on SFASLST
- Click  (Next Block) to view class list
- Click **Help** (Menu bar), **Extract Data with Key** or **Extract Data No Key**
 - If list includes waitlisted students, will get a warning message for each. Click  until message no longer appears
- Select '**Open in Excel**' if asked
- Save file to PC
- Click  (Rollback) to return to the Key Block (to search for another class list)
- Click  (Exit) to close form and return to Banner Main Menu






Course Enrollment

- Key in **SSASECQ** in the **Object Search Field (Go To...)** on the Banner Main Menu
 - Press **Enter**
 - By opening a query form directly from the Banner Main Menu will not be able to view information about a course other than the information that appears on the query form
- Enter search criteria
 - **Term** – Enter term
 - **Subject** – Enter subject
 - **Course** – If not entered, query will return all courses
 - Leave blank if searching for all courses for a subject
 - Enter a course number if searching for specific course

- Enter '#%' to look for courses within a specific level
Examples: 2% returns all 200 level courses, 5% returns all 500 level courses
- Use '<', '>', '=' or a combination to search for courses within a range of levels
Examples: >=200 returns all courses 200 and above, <200 will return all courses 199 and below, <>210 will return all courses except 210
- **Section** – Will not use '0' (zero) section for registration
 - Enter '>0'
 - If left blank, '0' sections will be returned in the results
- **Section Status** – Enter 'A' to query only Active sections
- **Enrollment: Actual** – Enter '>0' to query sections that have students registered
- **Enrollment: =** – Enter '>0' to query sections that have available seats
- **Waitlist: Actual** – Enter '>0' to query sections with students on the waitlist
- **Waitlist: =** – Enter '>0' to query sections with available waitlist seats
- Click  (Execute Query)
- Click **Help** (Menu bar), **Extract Data with Key** or **Extract Data No Key**
- Select '**Open in Excel**' if asked
- Save file to PC
- Click  (Cancel Query) followed by clicking  (Enter Query) to search for another subject and repeat process
- Click  (Exit) to close form and return to Banner Main Menu

HR Extract Example:

PHIETIM list of all employees for a specific Payroll ID and Payroll Number.

- Key in **PHATIME** in the **Object Search Field (Go To...)** on Banner Main Menu
 - Press **Enter**
- In the Key block enter the appropriate information:
 - **Organization** – Key in number
 - **Transaction Status** – Select All (Except not Started)
 - **Payroll ID** – Key in BW for Bi-weekly or ST for Student
 - **Payroll Number** – Key in payroll number for time entry information to extract to Excel
 - If the date and time for entering and approving the payroll has passed, will receive a warning on the Auto Hint/Status line that pay period selected is not open for time entry
- Click  (Next Block) to move to **Jobs Information Block**
- Click  (Search) from Jobs information block (between ID and Last Name) to open Web/Department Employee Time Inquiry PHIETIM
- Click **Help** (Menu bar), **Extract Data with Key** or **Extract Data No Key**
- Select '**Open in Excel**' if asked
- Save file to PC
- Click  to close PHIETIM and return to PHATIME
- Click  (Rollback) to return to the Key Block (to search for another payroll list)
- Click  (Exit) to close form and return to Banner Main Menu

Exit

Exit Forms

- Click or on form(s) until **Banner Main Menu** appears



Exit Banner and Close Internet Native Banner Window

- Click (Exit) on **Banner Main Menu** or click (Exit) on the Toolbar



- Click (Exit) to close SIUE Internet Native Banner window



Additional Resources

Phone Numbers

- ITS Help Desk: 650-5500
- Human Resources: 650-2190
- Student Service Center: 650-2080
- Registrar's Office: 650-3770

Web Sites

- Banner Production: <http://www.siu.edu/its/banner>
- Banner FAQ's: <http://www.siu.edu/its/banner/faq.shtml>
- Banner Training: http://www.siu.edu/its/banner/banner_training.shtml
- Human Resources: <http://www.siu.edu/humanresources>
- Registrar's Office: <http://www.siu.edu/registrar>
- ITS: <http://www.siu.edu/its>
- ITS e-ID Maintenance: <http://www.siu.edu/eid>
- ITS Training: http://www.siu.edu/its/fac_staff/training

Email Addresses

- Production Control: oitaccts@siue.edu
 - Locked Banner account
 - Banner access
- ITS Help Desk: help@siue.edu