Introduction to Banner

Table of Contents

In this class 2
What is Banner? 3
Banner 9 Forms Navigation 4
  To Open: 4
  The Banner Welcome Screen 4
Welcome Screen components 5
Searching for an Object (Form, Menu, etc.) 6
Naming Conventions 8
What is a Form? 9
Parts of a Form 9
The Notification Center 10
Navigating Tabs, Records, and Fields: 10
Exiting Banner Securely 11
Looking up people in Banner 11
A more informed search: The SOAIDNS Form 15
Rules for Name Searches 16
Download Data from Banner Forms to Excel 17
Data Entry 18
  Name Change 18
  Change an Address (This is done by the Registrar's, CE/Grad, and HR office only) 19
Data Entry Standards 20
Keyboard Shortcuts 22

In this class

1. This class introduces the Banner application and provides tips for using it more effectively.

2. The "business" you conduct using Banner will probably NOT be covered here. There are over 2400 forms for recording everything from recruiting activity to grading, club membership to alumni donations and employee benefits. CWIS, the self-service part of Banner, has over 1000 reports and several hundred processes that are used at Curry. People in your office likely have a much wider range of Banner expertise than what will be covered here.

3. If you do much work in Banner you will need to continue learning about various forms and features. This class will familiarize you with various Banner resources.

    - Banner/CWIS sub-tab under the Technology tab in the myCurry portal
    - Banner Bookshelf (Index at Common\Banner 8 Bookshelf\Bkshlf8x.pdf)
    - Ellucian Support Center
    - eCommunities
    - Banner Help Center (Online Help) and CWIS Help buttons

What is Banner?

1. Banner is an Enterprise Resource Planning (ERP) system designed to automate processes, provide access to institutional data, manage resources, and strengthen decision making. It consists of Banner 9 Forms and CWIS.

2. Banner 9 Forms is the administration portion of the product and will be the primary focus of this introduction. It is available to most staff and full-time faculty and in a limited way to some student workers.

3. CWIS (Curry Web Information System a.k.a. Banner "Self-Service") has many user-directed features as well as custom reports and processes written by Curry developers. It is accessed directly and via myCurry portal links.

4. The Banner database is the main repository for Curry's institutional data and is the best place to go for reliable data.

5. Ellucian is the Banner vendor. Curry College licenses their full suite of Administration Systems, Human Resource, Finance, Financial Aid, Student and Advancement and has a support contract with Ellucian for resolving problems or answering user inquiries.

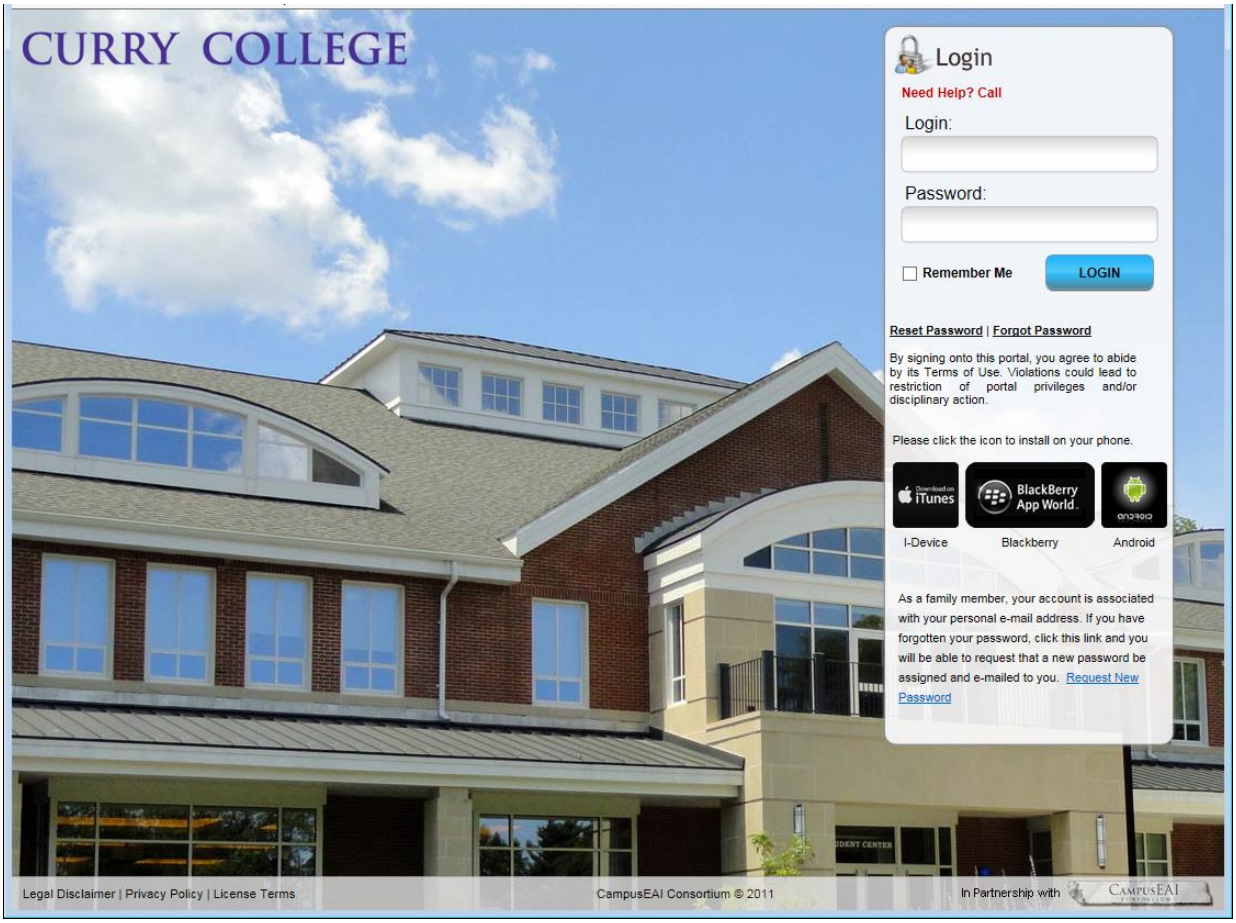
6. Banner data is available in many ways to various people associated with the campus. Students primarily use data and processes in the CWIS via the myCurry portal and Curry mobile app. Staff and Faculty use both the CWIS and Banner 9 Forms.

Banner 9 Forms Navigation

To Open:

1. Select the purple "B" icon labelled "Banner9" on the QuickLaunch area of the portal, OR click your desktop "B" icon, OR go to https://banadmin.curry.edu:8443/applicationNavigator

2. A logon Screen opens
3. Logon: Enter your username
4. Password: Enter your myCurry portal password
5. Click the LOGIN button

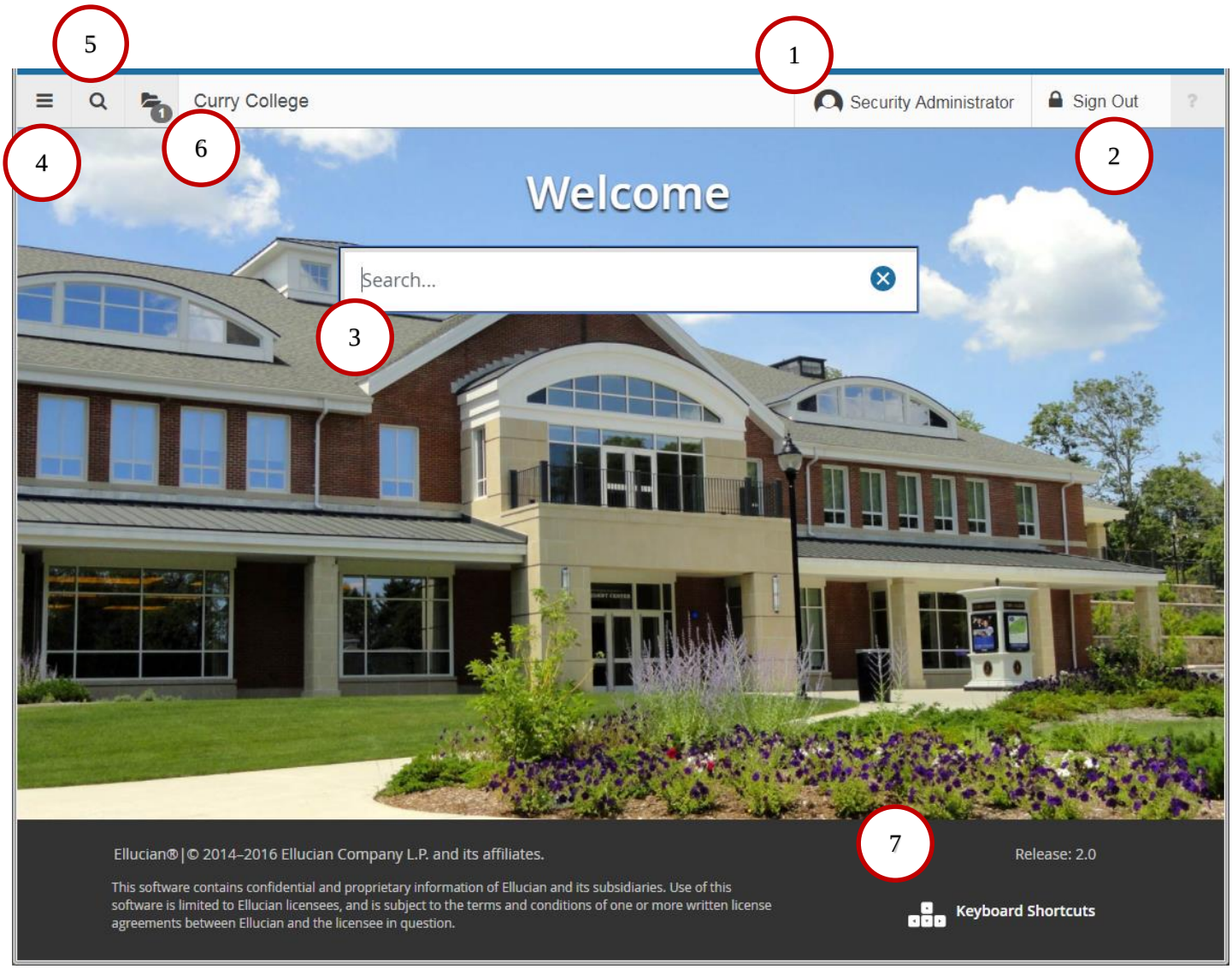


The Banner Welcome Screen

Once logged in, the landing page is the Welcome Screen. It acts as an Application Navigator to the various Banner Forms. Most navigation components of the Welcome Screen are available on other forms and most options work like buttons and can be toggled on and off by clicking.

Welcome Screen components

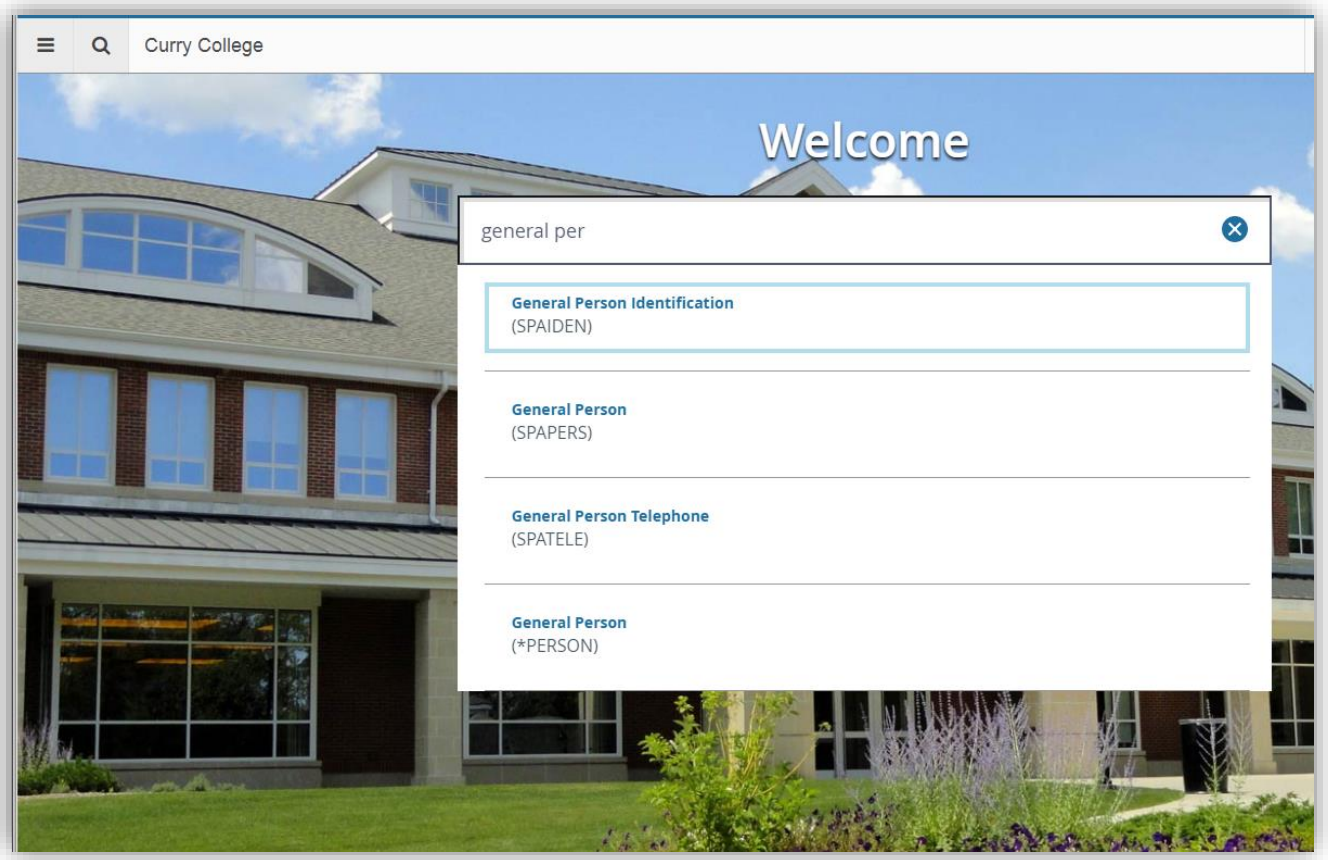
1. User who is logged in
2. Button to log out
3. Search bar in the middle of the screen
4. Pop out menu
5. Search button
6. Folder to access recently used forms
7. Keyboard shortcuts reference



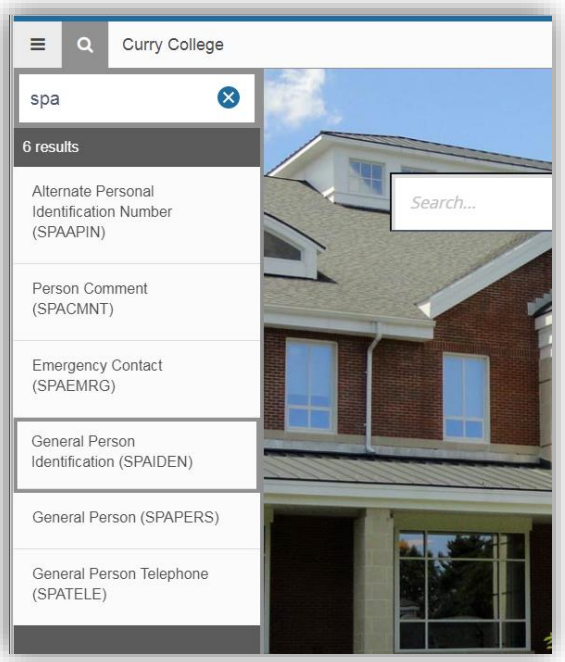
Searching for an Object (Form, Menu, etc.)

- Use the **Search…** box on the Welcome Screen

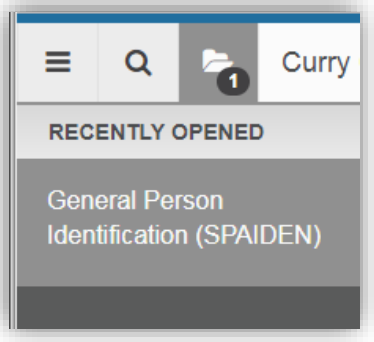
  Start typing the title or the 7-character name and objects with that name start appearing underneath to click or arrow-through. Click the one highlighted or hit enter to open the page. *Please note that if you don't have access to a form, your search will return* "No Results Found".



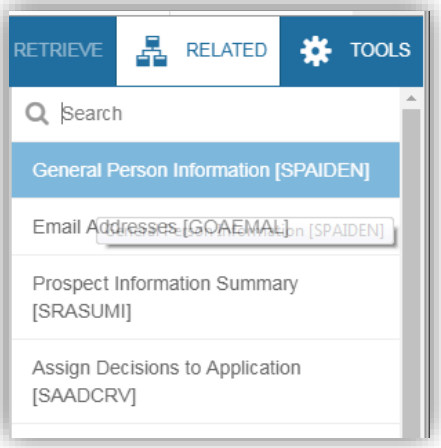
- Click the **Search Icon** (or CTRL+SHIFT+Y) on any screen



- Re-open a form that has already been used in this session via the **Recently Opened** folder icon



- Find a form using the **Related** button that lists related forms [NOTE: "Related" is not available from the welcome screen]



Naming Conventions

Forms/Processes

- Come with the software
- Their names are always 7 letters

The first letter of the form/process indicates its product association:

- "G" = General
- "S" = Student
- "F" = Finance
- "R" = Financial Aid (R stands for Resource)
- "P" = Human Resources (P for personnel)
- "A" = Alumni/Development

The second letter identifies the application module

- This has a unique value based on the module

The third letter identifies its type

- "A" = Application form – For entering, updating, or querying information
- "B" = Base Table
- "I" = Inquiry Form – For looking up existing data
- "P" = Process/Report
- "R" = Rule form, or Repeating Rules Table, or Report – Allows tailoring to institution
- "T" = Temporary Table
- "V" = Validation Table or View – For creating the choices in other forms

Letter 4-7 is a unique descriptor of function

- Usually they are an abbreviation of the form
  Examples:
  SPA'EMRG' = Emergency form
  SPA'MEDI' = Medical form
- If last letter is a Q it is a query (look up form)

Reading a Form/Process Name

Example:

ROAINST

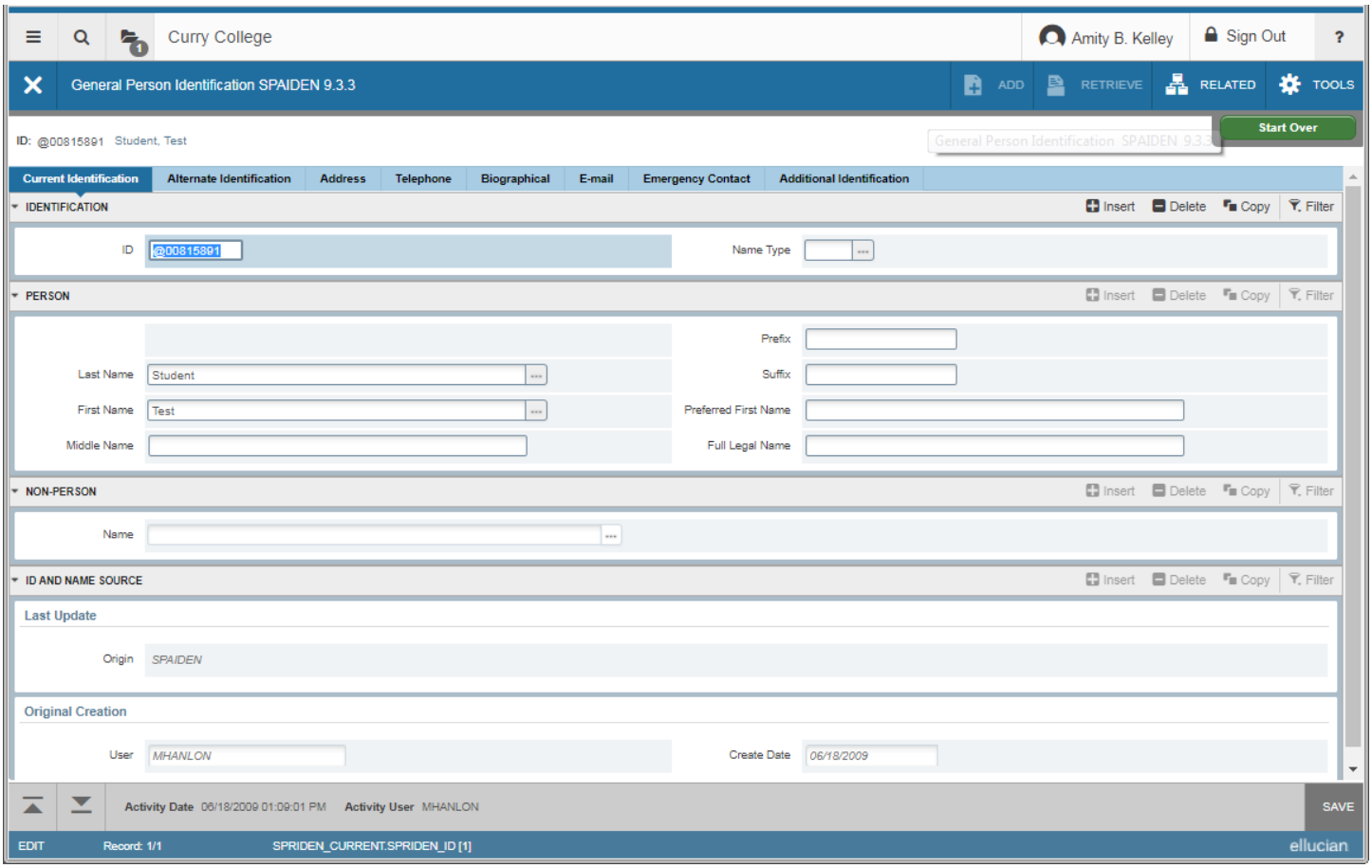
R Financial Aid - mode
O Common Functions - menu
A Application
INST Institutional Options – abbreviation of function

What is a Form?

A form is an online document where you can enter and/or 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 sections, tabs, windows, dialog boxes, and alert boxes.

Parts of a Form

1. **Menu** button, **Search** button, **Recently opened** button, Institution, User, **Sign Out**, and **Help** live on the top of the form
2. **Title Bar** is the blue bar near the top that shows the Form name, its 7-character identifier, its version, and some buttons [note that "ADD" and "RETRIEVE" button are not used at Curry]
3. Most forms have **Related** and **Tools** and **?** (Help) options
4. Many forms have **Sections** (occasionally referred to as "blocks")
5. **Navigation icons** (for next and previous section and for moving through records)
6. **Functional icons** for **Insert, Delete, Copy, Filter**
7. **Tools** for Exporting, Printing, etc.
8. **Message bar** at the bottom indicating READ or EDIT access, Record displayed (i.e. 1/1), and database field

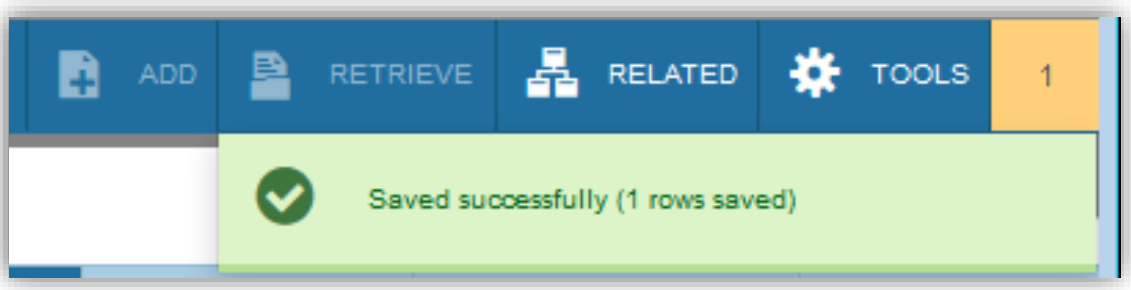


The Notification Center

A button pops-up occasionally in the upper right corner of a form to display various notifications. This is called the Notification Center. When an action is performed in a form, three color coded alerts are possible, as is an informational message.

GREEN indicates **SUCCESS**
YELLOW indicates **WARNING**
RED indicates **ERROR**
BLUE indicates **INFORMATION**

The button/box in the upper right, next to Tools, indicates the number of notifications that are present. To hide them, click that box. This is often necessary to continue working.



Navigating Tabs, Records, and Fields:

You can navigate to different records in several ways:

1. Navigate through tabs using:
    a. Mouse to select a tab
    b. Next Section button in lower left ▼
    c. Previous Section button in the lower left ▲
    d. Keyboard shortcuts of Alt + PageUp OR Alt + PageDown

2. Navigate through records using:
    a. Mouse to select Next ► (and ►| to end)
    b. Mouse to select Previous ◄ (and |◄ to beginning)
    c. Keyboard shortcut to next record using the Down-arrow ↓
    d. Keyboard shortcut to previous record using Up-arrow ↑

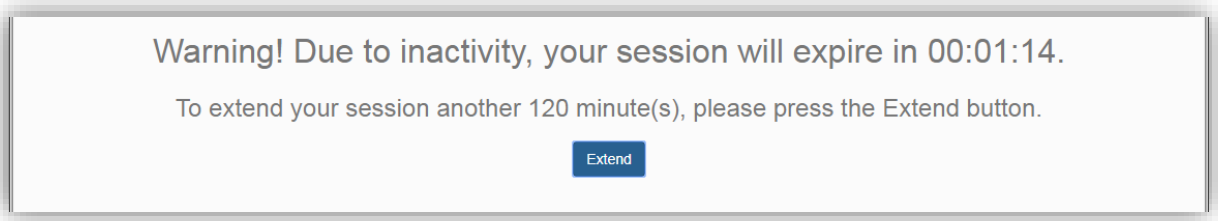
3. Navigate within a record, field to field, using the mouse or tab

Processes

Some offices on campus run Banner *processes* both during the day and on an automated basis at night. The Ellucian documentation on processes is usually very detailed and can provide a user with the necessary settings. One process that is common to multiple offices is the Student Schedule process or SFRSCHD. Processes are often run for a specific group of students called a Population Selection. Please visit the myCurry portal for additional documentation on "pop sels".

Exiting Banner Securely

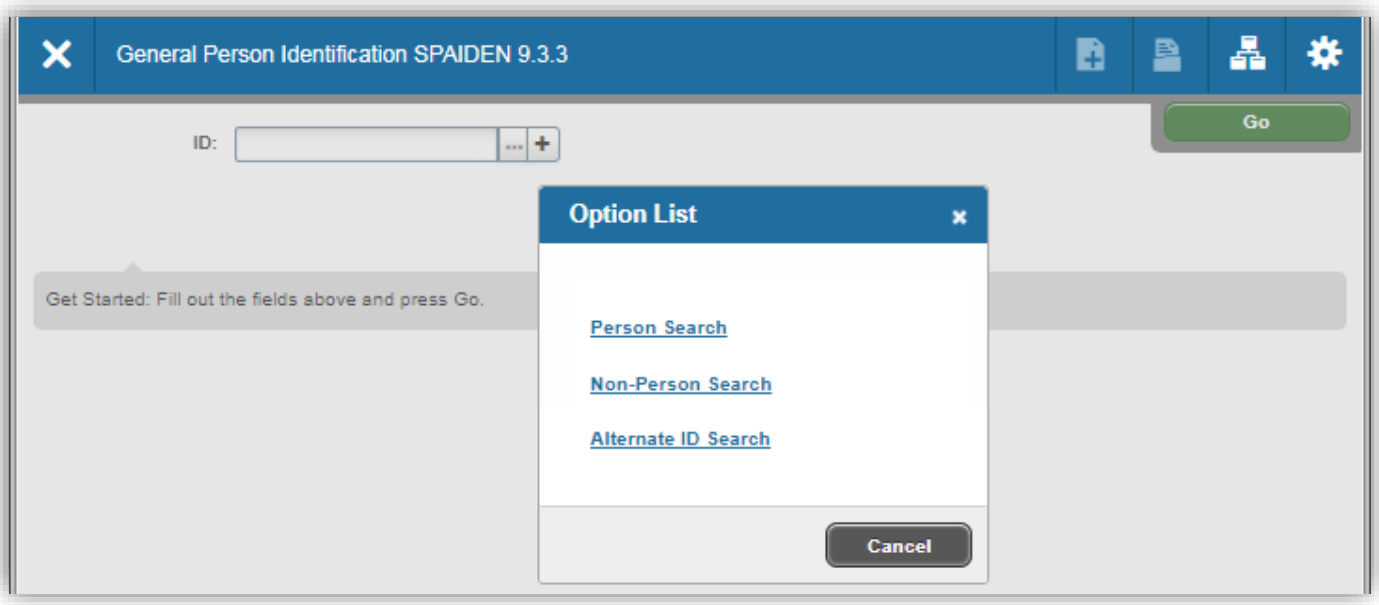
Signing out of Banner can be done from any form using the Sign Out option in the upper right corner. Like most web-based applications, after exiting, closing the browser is the best way to ensure that the connection to Banner is truly closed. A best practice is to close ALL instances of that browser. The product itself has "time-out" parameters that will cause users to lose connections after several hours of inactivity. This window of inactivity is even shorter if the user has accessed Banner 9 from the myCurry portal. The portal does give the option to extend the session in a window like the one below.



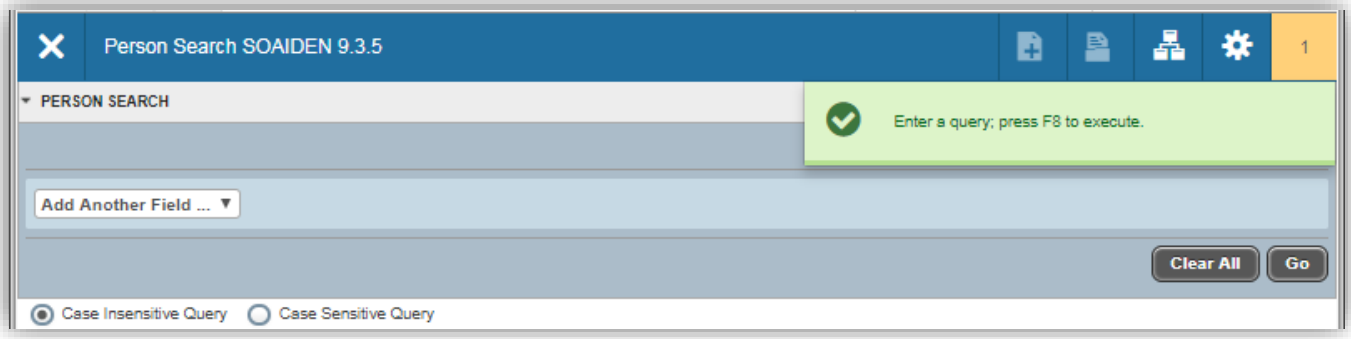
Looking up people in Banner

When looking up a person, your first assumption should be ***that the name is there***. Be aware that the name may be misspelled. The forms to use are: SPAIDEN (or APAIDEN/PPAIDEN for IA/HR), SOAIDEN, and SOAIDNS

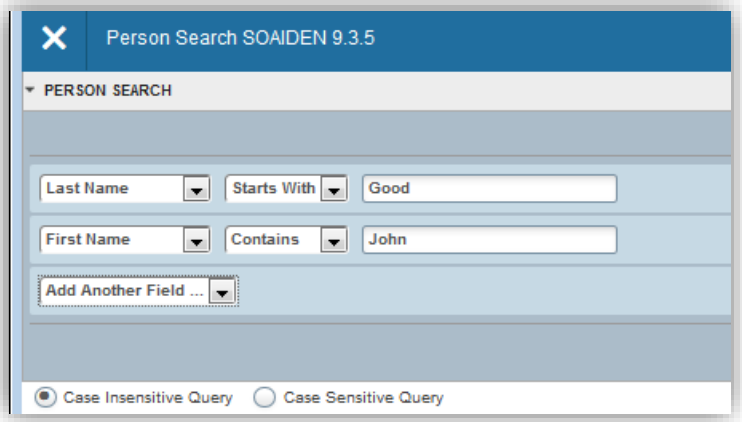
1. Open SPAIDEN, select the "…" (ellipses) to get the **Option List** box to open. Click on **Person Search**.



2. SOAIDEN opens up with the Notification Center displaying a Green message and a "Filter Box" and a default of "Case Insensitive Query".

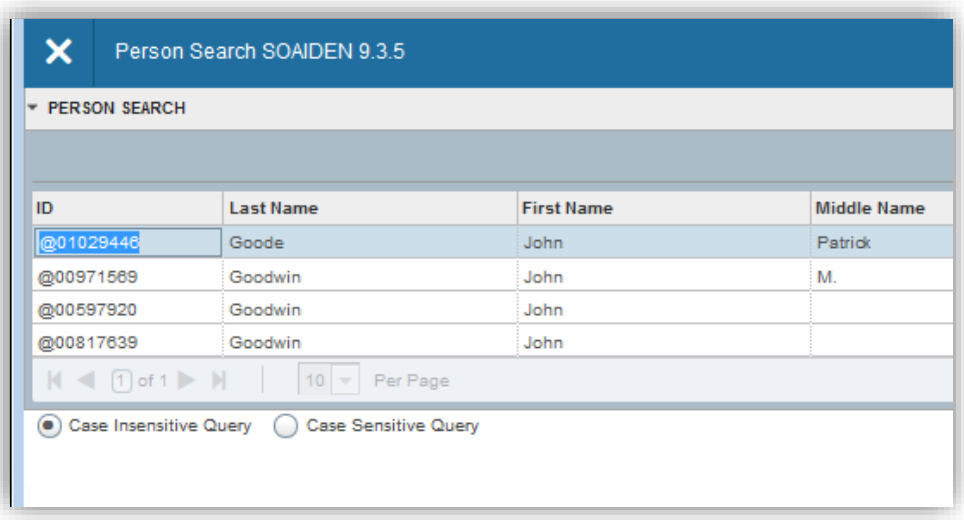


3. Select the filter criteria from ID, Last Name, First Name, Middle Name, Change Indicator, and Name Type.
4. Immediately, a second filter box appears to choose: Contains, Like, Starts With, Ends With, Equal, or Not Equal.



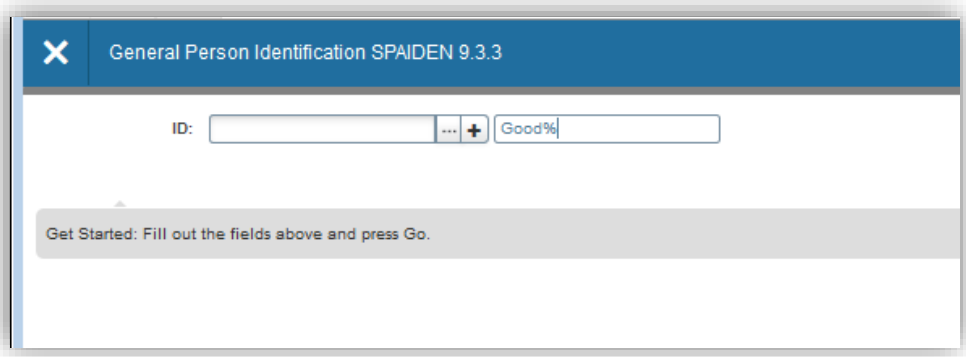
5. Select GO to apply that one filter, or select another field to include more filters, and GO.

6. When the list appears, double click on the person you want and open the record.

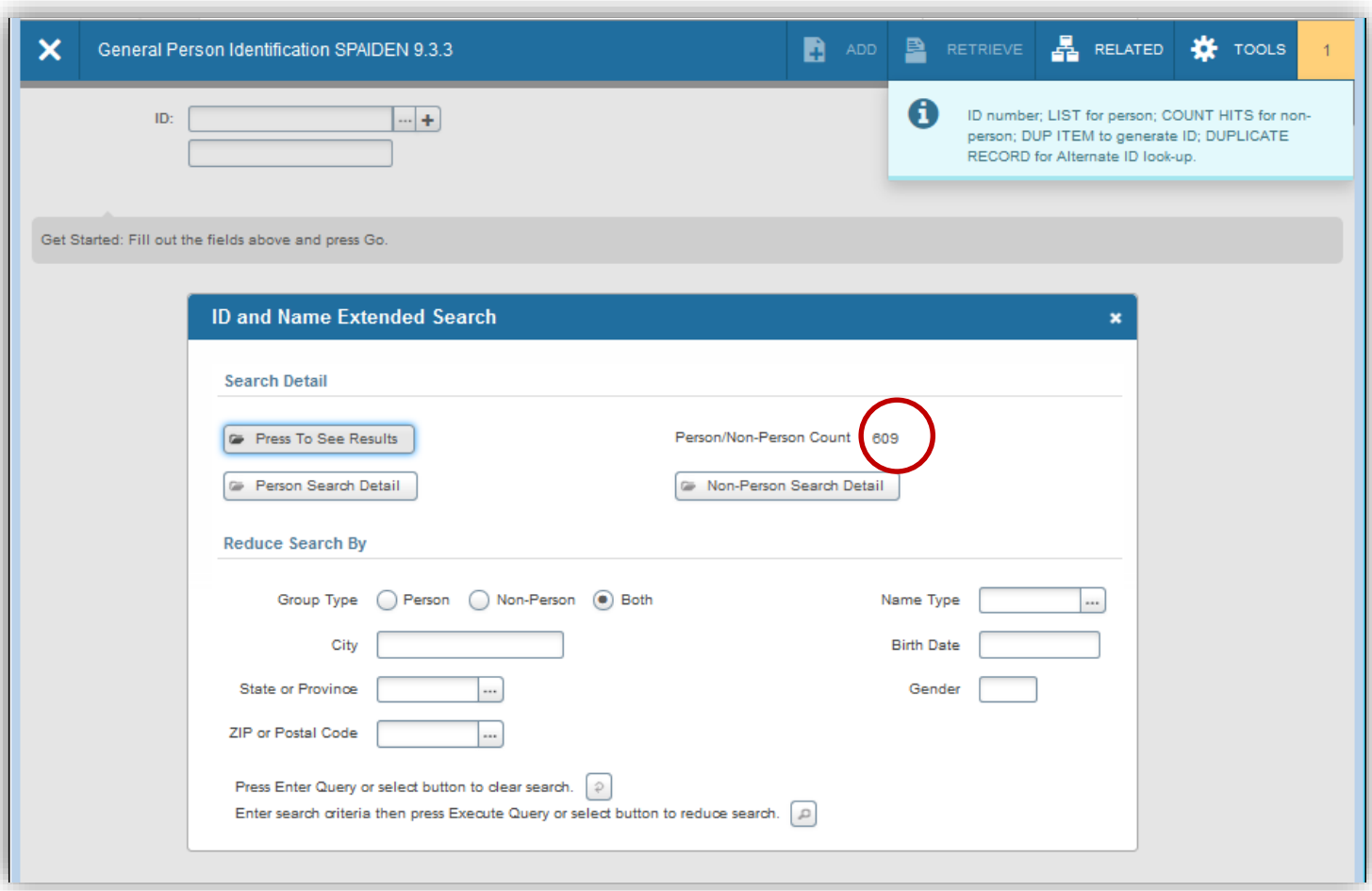


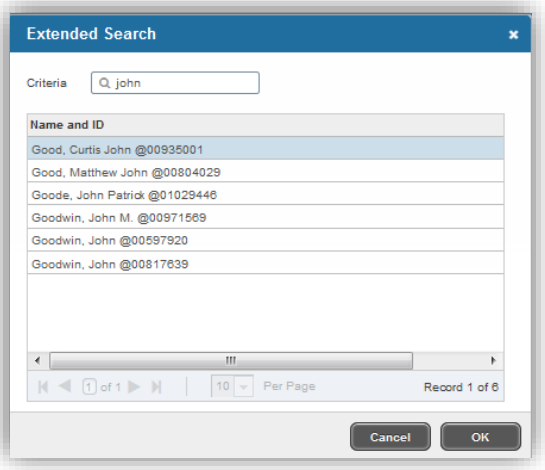
This is a great method for determining whether a given name is in the database already. However, if you need to use other information to narrow down which person, having a common name, is the one you need, you may need the Extended Search.

In the SPAIDEN key block, tab to the right to show the name box, and type part of the name with wildcard character(s) and hit ENTER and an Extended Search window appears. It has options to reduce the search using other characteristics (city, state, zip, birth date, gender, etc.).



A "Person/Non-Person Count" displays in the upper right, and that number can be reduced by entering info in the bottom half of that window and then clicking the search icon at the very bottom. After doing that, click the Press to See Results button.

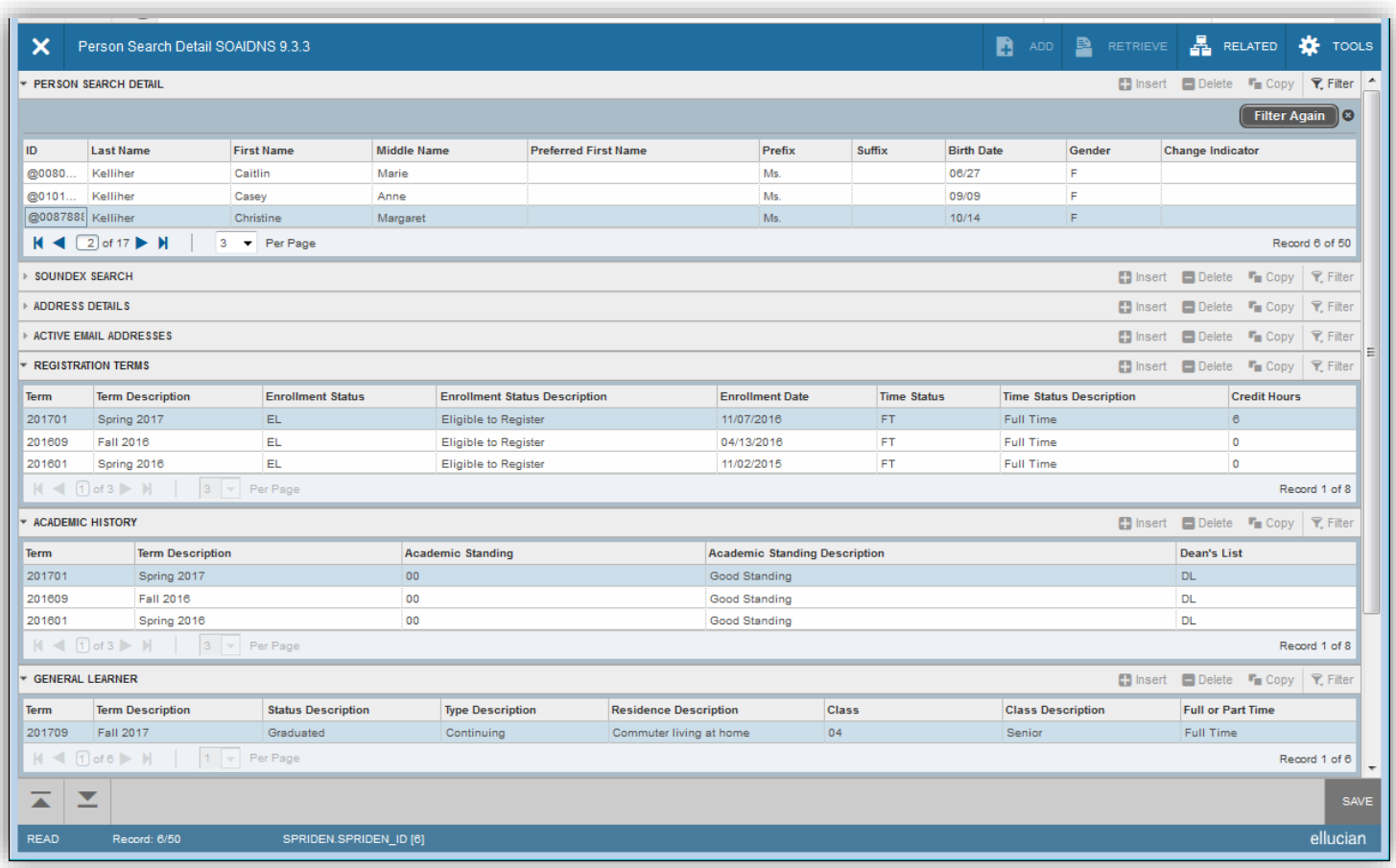

General Person Identification SPAIDEN 9.3.3
ADD
RETRIEVE
RELATED
TOOLS
1
ID:
ID number; LIST for person; COUNT HITS for non-person; DUP ITEM to generate ID; DUPLICATE RECORD for Alternate ID look-up.
Get Started: Fill out the fields above and press Go.
ID and Name Extended Search
Search Detail
Press To See Results
Person/Non-Person Count
609
Person Search Detail
Non-Person Search Detail
Reduce Search By
Group Type
Person
Non-Person
Both
Name Type
City
Birth Date
State or Province
Gender
ZIP or Postal Code
Press Enter Query or select button to clear search.
Enter search criteria then press Execute Query or select button to reduce search.


Extended Search
Criteria
john
Name and ID
Good, Curtis John @00935001
Good, Matthew John @00804029
Goode, John Patrick @01029446
Goodwin, John M. @00971569
Goodwin, John @00597920
Goodwin, John @00817639
1 of 1
10
Per Page
Record 1 of 6
Cancel
OK

A more informed search: The SOAIDNS Form

For Banner users who work with Student data, there is another option when searching for the "right" student in Banner.

While the SOAIDNS form doesn't allow searching with any criteria other than first or last name (and it is Case Sensitive), once your selection is shown at the top, you can step down through the records with the down arrow and see information about Address, Email, Registration Terms, Major, and Academic History.



Rules for Name Searches

Look up for the Last Name

1. Even if you are sure of the spelling, use wild cards in the search. Remember that the person may be in the database with a misspelling. If you look up the name with wildcards, you may be able to find all misspellings and duplicates.
2. Important – Forms are occasionally case sensitive, meaning that if a name is in the database with capital letters then searching form them using capital letters is required. Most search screens have an indicator where sensitivity can be specified.

To facilitate look up, you can use a wild card.

1. % is the symbol for wild card.
2. Type in the % key for unknown letters or possible spaces.
3. Remember, some people have hyphenated last names, i.e. John Murphy-Brown. To look up hyphenated names: type %Brown for John Brown who is really Murphy-Brown.

Look up for the First Name

You may:

1. Leave it blank. (usually the best option)
2. Type the first initial followed by a % or several letters followed by a %.
3. Examples: V% or Val%
   Suggestion: Often people use middle names and shortened forms of names. If you are having trouble finding a person, leave the first name blank.
4. If you find more than one person with the same student name and need to determine which one is your student, enter the SOAIDNS form. In SOAIDNS you can compare names, addresses and other data about the students.

Suggestions for Look Up:

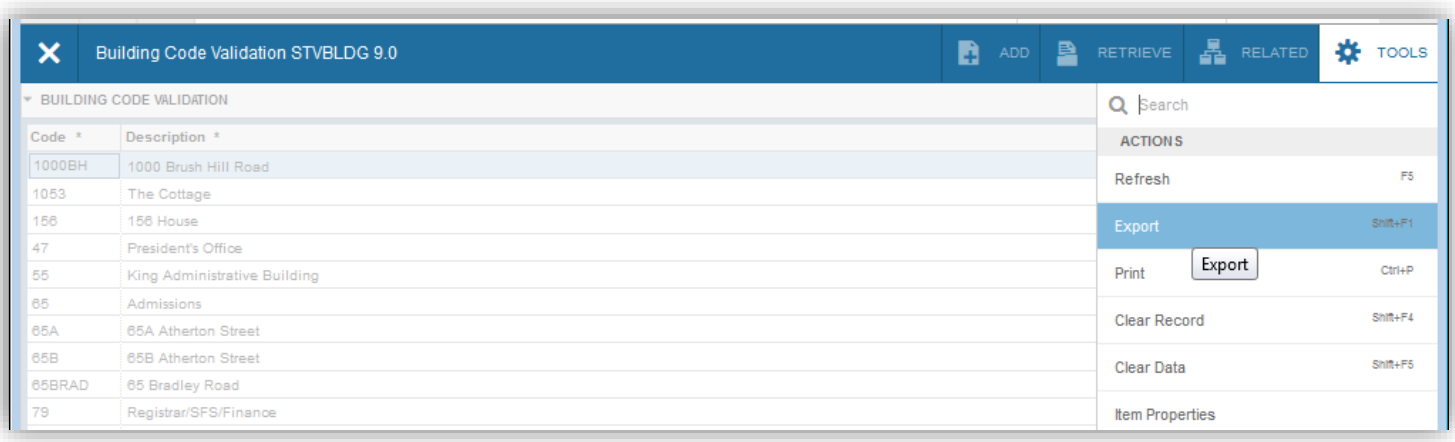
Sounds like:	Search with:	Actual Name:
Dave Ann-again	A%n%g%	David Ahnnigan
Sibil Ah-zeen	A%z%n	Sybil Ajdzien
Mary Za-brisky	Z%b%sk%	Larissa Mary Zabiskie
Tom Fitzgerald	F%t%g%d%	Shawn Thomas Fitzgerald
Jackie Butts	%But%s	Jacqueline Kennedy-Butts
Kerry Yello-chuck	???	???

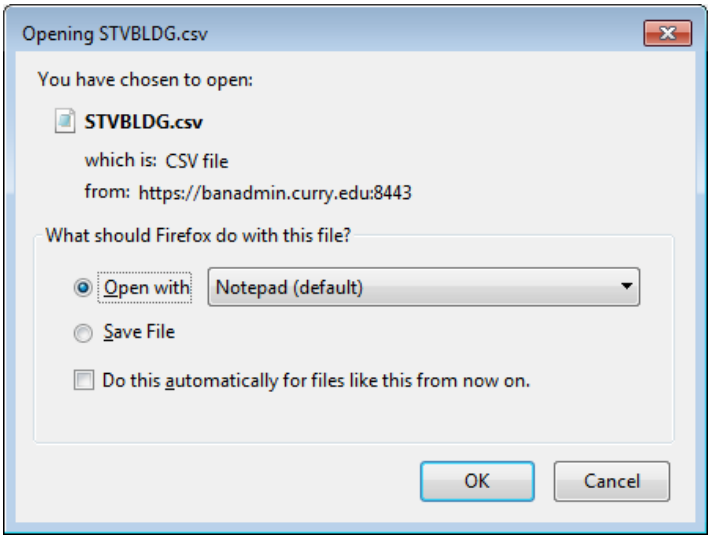
Download Data from Banner Forms to Excel

This is a very neat feature to quickly get the data from a Banner Form into Microsoft Excel for further manipulation or send to other users. This is well suited for forms that have data in multiple rows and columns, i.e. inquiry forms.

To download the data from any form into Microsoft Excel:

1. Display the data on the form as you normally would.
2. Click the Tools button and select Export





1. A box pops open from the browser with a message about what to do with the output, i.e. Open, Save, or Save as. Opt as desired and then you can see all the Form output in Excel.

Data Entry

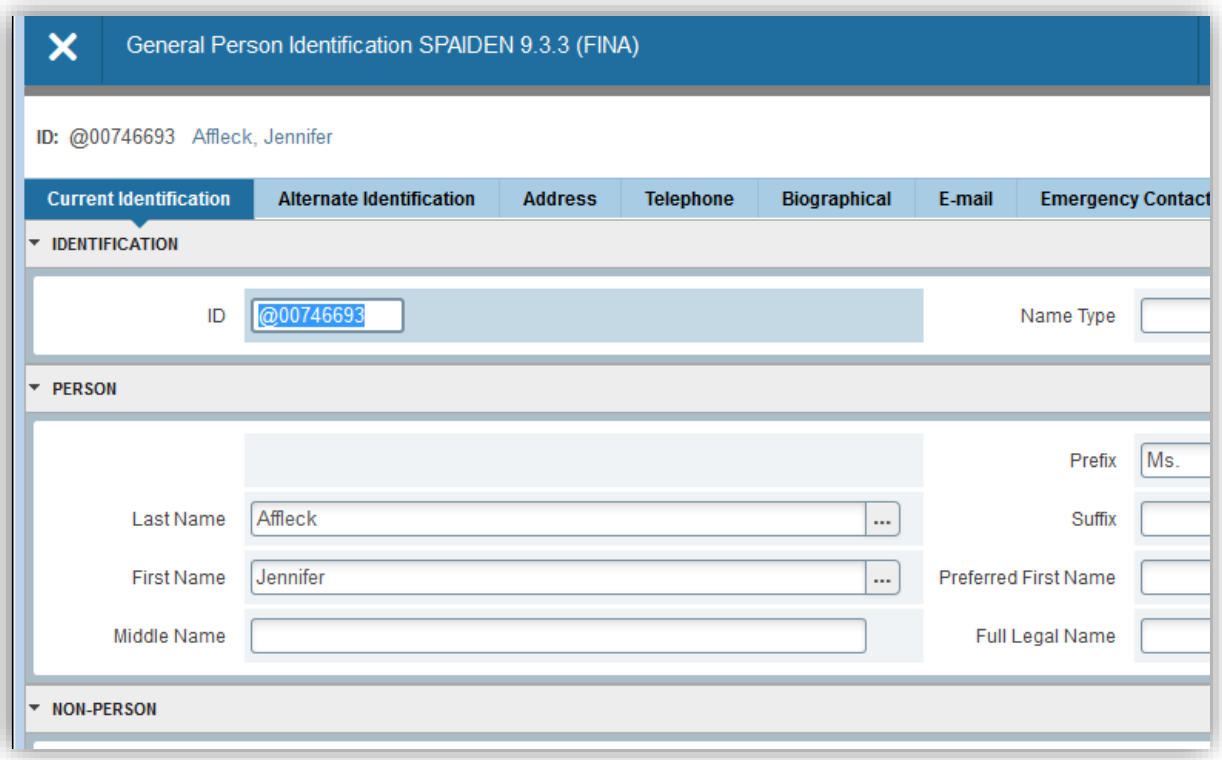
Make corrections on the SPAIDEN form. Check Data Entry Standards for accuracy. Name changes are only made by Departments that enter new students/employees: Admissions, CE, Graduate Studies, Registrar, and HR.

Name Change

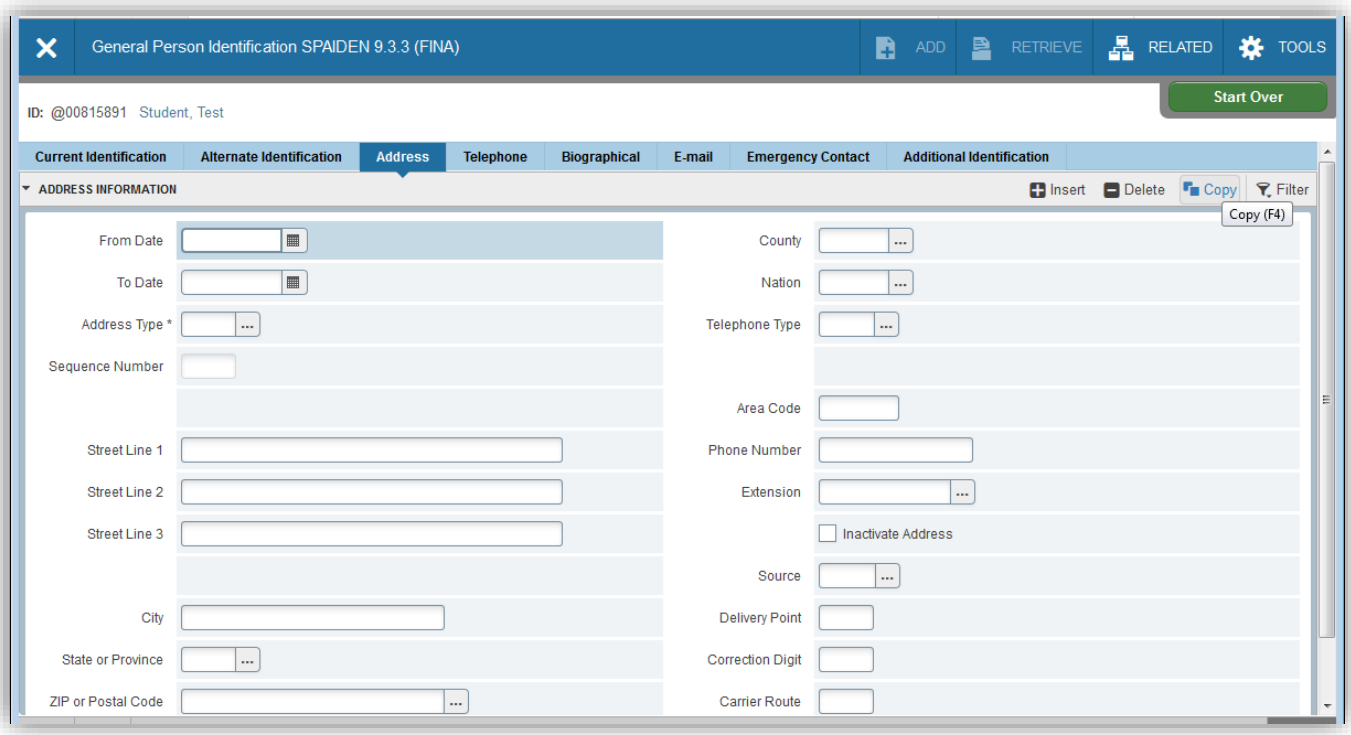
1. Find the record in **SPAIDEN**
2. Change the name in the name fields and click SAVE
3. The old name is conserved on the Alternate Identification tab automatically
4. IMPORTANT: If the name change is a FIX of an incorrect name (i.e. it has never been the person's name, and no one has known them by that name) the Alternate Identification entry for the incorrect name should be removed using the Delete button after the update
5. OTHER CONSIDERATIONS:

   Normally usernames do not change when a name changes, but in special situations, or when an account was created with the wrong name, notify the Tech Center about updating the username.

   Preferred First Names are now often added to records when the legal name has not yet changed but the person wishes to be known by a different name. This should NOT be used for nicknames. Again, if the Preferred First Name is desired for the Outlook address book, or the portal, the Tech Center may need to be updated.



Change an Address (This is done by the Registrar's, CE/Grad, and HR office only)



2. Click on the Address tab in SPAIDEN (APAIDEN or PPAIDEN)

3. If the change is for an error in spelling, street number or incorrect zip code
   - Move to address record that is incorrect by clicking on down arrows or scroll bar
   - Make the change
   - Click SAVE

4. If student has a new permanent address:
   - Check off the "Inactivate Address" button on the right center area of the address record. Do not remove a permanent address. Optional*: If you know the last date the old address was valid, enter it in the To Date field of the inactivated address.*
   - Click SAVE
   - Click the Insert button
   - Type a "D" in the From Date field to make the address effective today, or enter the date it was or will be active
   - Enter a new address
     - Enter Type of address (PR for permanent or use ellipses for drop down list)
     - Enter street address.
     - Enter the zip code and state, city, and county will fill in automatically
     - Verify that all is correct and follows our standards
     - Click SAVE

Data Entry Standards

- **Name Fields:** All names must be entered exactly as the person spells them using both UPPER and lower case characters. Names also must include spaces, apostrophes, hyphens, etc.
  Examples: McDonald De La Hue O'Leary Smith-Jones

- **Name Prefixes:** All people should have a name prefix in the database. Use both UPPER and lower case characters. Include a period at the end.
  Examples: Mr. Mrs. Ms. Dr.

- **Name Suffixes:** If a person has a name suffix, it should be put into the database. A name with a Roman numeral suffix should be entered as II or III or IV. Do not include a period at the end. Do include periods after Jr. and Sr. Always use UPPER and lower case where appropriate.
  Examples: Jr. Sr. Ph.D. Harold Adams IV

- **Addresses:** All address information should go from the most local to the most remote, from top to bottom. So, an office, floor, department, building, etc. should come BEFORE the actual street address. Think in terms of the Post Office trying to get the mail to the person, by reading in reverse order. They start at the bottom, with State, then go to Town, then to Street, then to the next line up for an even more specific location.

  When entering address information, first enter the **Zip Code** and then confirm the city and state with the person (or form which are entering the data.) This reduces the number of keystrokes required for data entry and ensures the correct spelling of the cities and state codes.

  Example:
  Mr. John Q. Smith
  Room 442, Main House
  Curry College
  1071 Blue Hill Avenue
  Milton, MA 02186

- **Street:** When entering street address, use the FULL NAME or the street, do not abbreviate the name of the street, or the word "Street", "Road", "Avenue", "Circle", "Way", "Lane", "Drive", "Parkway", or any other such information.

- **Compass Directions:** When entering compass directions, use "North", "South", "East", "West", "NW", "NE", "SW", and "SE". Do not use periods.

- **Apartment Numbers & Suites:** When entering apartment numbers, use the code "Apt." (Be sure to put a blank space after the period), but DO NOT enter a # to indicate the apartment number. When using the word "Suite", enter the entire word, no abbreviations.
  Examples:
  Correct: Apt. 203 Suite 1492
  Incorrect: Apt. #203 Apartment 203 APT. 203

- **Post Office Boxes & C/O:** Post Office boxes should be entered using the text PO Box then the number. No periods or spaces are used to separate the P from the O, and the word Box should be both UPPER and lowercase. Address in care of another should be entered as C/O in UPPERCASE. The % key should NEVER be used as part of a data field.
  Examples:
  PO Box 237 PO Box 17256 C/O John Q. Smith

- **County:** Leave County blank - we do not use it.

- **Nation:** Nation should remain blank for all U.S. addresses. Please use the "List Field Values" command to obtain the appropriate Nation Code for all foreign addresses.
  Example of Nation Code: 82 South Korea

- **Telephone Numbers:** Do not include dashes or spaces in telephone numbers. Simply enter the numbers into the spaces provided on the screen. The Area Code field has room for more than 3 digits (to accommodate foreign numbers) so be careful to tab over to the Number Field for the next 7 digits and finally tab to the Extension field, only if needed.

- **Address Types:** Valid Address Types include the following with the associated meaning. Please assign the correct type when creating an address.

CODE	DESCRIPTION	
BI	Billing	Used for the address to send an invoice. Not used if the billing address is the same as the Permanent address.
BU	Business	
CA	Campus/Curry	On-Campus Address (Curry)
CB	Curry Staff/Faculty Address	Curry business address
CS	Corporate Subsidiary	
DB	Duplicate Billing	Used only if the bill is being sent to multiple locations. Bills will always be sent to either BI or PR address. A second billing run will be made to send additional DB address types.
HQ	Corporate Headquarters	
MA	Mailing	
OC	Off-Campus/Curry	Student residential address that is not their parents'
P2	Parents 2nd Address	
PA	Parents	The address of the student's parents.
PO	Purchase Order	
PR	Permanent	Person's normal permanent address.
SC	College or Independent School	Used when a potential student is not living at home, but is at a school. This might be a boarding school or another college.
TE	Temporary	Used for people who will be at an unusual address for a specific period of time.

Keyboard Shortcuts

Action	Banner 9 Keystrokes
Cancel Page, Close Current Page, or Cancel Search/Query (in Query mode)	CTRL+Q
Choose/Submit	ENTER
Clear All in Section	SHIFT+F5
Clear One Record	SHIFT+F4
Clear Page or Start Over	F5
Count Query	SHIFT+F2
Delete Record	SHIFT+F6
Down/Next Record	Down Arrow
Duplicate Item	F3
Duplicate Selected Record	F4
Edit	CTRL+E
Execute Filter Query	F8
Exit	CTRL+Q
Expand/Collapse Drop-down Field	ALT+Down Arrow
Export	SHIFT+F1
First Page	CTRL+Home
Insert/Create Record	F6
Last Page	CTRL+End
List of Values	F9
More Information	CTRL+SHIFT+U
Next Field or Item	Tab
Next Page Down	Page Down
Next Section	ALT+Page Down
Open Menu Directly	CTRL+M
Open Related Menu	ALT+SHIFT+R
Open Tools Menu	ALT+SHIFT+T
Page Tab 1 Page Tab 2 and so on	CTRL+SHIFT+1 CTRL+SHIFT+2 and so on
Previous Field or Item	SHIFT + TAB
Previous Page Up	Page Up
Previous Section	ALT+Page Up
Print	CTRL+P
Refresh or Rollback	F5
Save	F10
Search or Open Filter Query	F7
Select on a Called Page	ALT+S
Toggle Multi/Single Records View	CTRL+G
Up/Previous record	Up Arrow