About Banner
Banner is the main administrative system at CCSU. It contains products (or systems) used to maintain all Student, Finance, Financial Aid and Alumni information and limited Human Resources information. Banner is an “integrated system”, meaning information is shared between the various products, eliminating the need to duplicate data entry.

Information in Banner is stored on forms. Banner forms are documents used to enter and store information in the Banner database. They visually organize information so that it is easy to enter and read. Each Banner form has a specific 7-character name that is used to identify the form. An example of a form name is **SPAIDEN**, which is the General Student Identification form.

Each of the 7-characters in a form name has a specific purpose:

**Character 1:** Identifies the Banner product (system) owning the form. The S means that the SPAIDEN form is owned by the Student system. Other products (systems) are:
- F – Finance
- R – Financial Aid
- P – Human Resources
- A – Advancement

**Character 2:** Identifies the Banner module (sub-system) owning the form. The P means that the form is owned by the Person module (sub-system) of the Student system. Each product has unique modules.

**Character 3:** Identifies the type of form. The ▲ means that this is an Application form.

**Characters 4-7:** Identifies a unique 4-character code, or abbreviation, for what is on the form. **IDEN** is an abbreviation for identification. Each form has its own unique 4-character code.

Logging in to Banner 8
When you access Banner 8, two web windows will open. A window titled **IN Banner** will appear then quickly change to **Oracle Application Server Forms Services**. The plug-in needed for Banner will run and launch a second window, **Oracle Developer Forms Runtime - Web** which is the actual Banner program. (Examples of the windows are on the next page.)
NOTE: Both windows must remain open while you are using Banner – if you close the window entitled Oracle Application Server Forms Services your Banner session will close.

To log in to Banner 8:
2. Log in with your BlueNet account username and password, then authenticate using Duo Security.
3. Open the Secure Desktop from within the Secure Enclave.
4. Double-click the Banner icon from the Desktop.
5. At the Login dialog box, enter your Banner username, Banner password and then click on Connect.

Banner 8 General Menu
The Banner 8 General menu, shown on next page, provides access to Forms, Links, Help and Broadcast Messages.
1. The Go To field is used to access forms directly.
2. My Banner menu is a menu that you set up to include the forms that you use most often.
3. The Banner menu is a list of all the product menus (i.e. Student, Finance, etc) and forms in the Banner system.
4. The X on the toolbar is used to exit Banner.
5. The Products drop-down list is used to access the various Banner products (i.e. Student, Finance, etc). To open a product menu, click and hold the drop-down arrow, highlight a product then release the mouse button.
6. The Menu link is used to access the General Menu, shown below.
7. The Site Map link is used to access the Site Map menu, shown below.
8. The Help Center link is used to access Banner Help.
9. The My Links section provides quick access to changing your Banner password and accessing Banner messages. The Personal Links can be customized with links to forms or web sites (in this example, the first Personal Link has been customized to link to the General Person form).
10. The My Institution section provides quick access to the CCSU web site.
11. The Banner Broadcast Messages section displays Broadcast messages sent out to all users.
Navigating to a Form

There are 3 ways to navigate to a form in Banner: using the Banner Menu, the My Banner Menu or the Go To field.

Using the Banner Menu

The Banner Menu lists all of the menus and forms in the Banner system. To use this menu to navigate to a form:

1. If the Banner menu is not expanded, double-click the Banner menu. You will now see all of the Banner products (Student, Finance, Financial Aid, Human Resources, Advancement), shown below.

2. Double-click on the name of the menu you want to open. You will now see a list of the sub-menus under the menu you opened.
3. Double-click on the name of the sub-menu to open. You will now see the form names in that menu and possibly additional sub-menus. To open a form, double-click on the form name - the form will open and your cursor will be in the Key Block.

**Using the Go To Field**
The Go To field is the fastest way to navigate directly to a form in Banner. Each form in Banner has a 7-character name associated with it, which you must know to use the Go To field.

To use the Go To field, to open a form:
1. From the General Menu, click in the Go To field, shown above.
2. Enter the form’s 7-character name (i.e. SPAIDEN), shown below

   ![Go To Field](image)

3. Press Enter. The form will open and your cursor will be in the Key Block, shown below.

**Shortcut:** Click in the Go To field and use the up and down arrows on your keyboard to scroll through forms accessed in the current session (once you log out, the list resets). Once the name of the form is in the Go To field, press Enter to access the form.

**Using the My Banner Menu**
The My Banner menu, located at the top of the Main Menu, is a menu that you set up to include the menus and forms that you use most often. To use the My Banner Menu to navigate to a form:

1. Double-click on the My Banner menu to open it, shown below.
2. Double-click on the form name. The form will open and your cursor will be in the Key Block.

To set up your My Banner menu for the first time:
1. Double-click on the My Banner menu to open it, shown above.
2. Double-click on Empty – Select to Build to access the My Banner Maintenance form (GUAPMNU).
3. Click in the Object field, type the 7-character name of the form (i.e. SPAIDEN) and press Enter on your keyboard, shown below. The description field will fill in automatically. Repeat this step for each form you would like to add.

4. When you are done adding forms, click on the Save icon (or the File menu, then Save).
5. Click on the Exit icon \(\times\) (or the File menu, then Exit) to close the My Banner maintenance form.
6. To see the changes to your My Banner menu, exit Banner and log back in.

**Using Banner Forms**
The parts of a typical Banner form are:
1. **Menu bar** – contains pull-down menus for navigating through forms
2. **Toolbar** – contains icons representing shortcuts to various menu options
3. **Title bar** – displays the descriptive name of the form, the 7-character name of the form and the Banner database name
4. **Key block** – the first block on many forms; used to enter key information to determine what is displayed on the form
5. **Block** – section of a form that group’s information together. Forms can have one or more blocks. The blocks can be tabbed, where there are tabs at the top of the form that allow you to move between blocks (as in this example), or they can be non-tabbed, where blocks are accessible by performing a Next Block function or using the Options menu.
6. **Field** - labeled space of a block containing information you can enter, query or display specific information
7. **Record** - group of fields that make up a logical unit. There may be more than one record within a block.
8. **Auto-hint/Status Line** - describes the field where the cursor is located, displays error and processing messages and record counts
If you need to navigate to another form from the current form, press the F5 button on your keyboard to access the Go To field. Once the Go To field is open, enter the 7-character form name and hit Enter.

**Next Block Function**

To view data on a form, you must enter information in the Key Block, and then perform a Next Block function. The information you enter in the Key Block will vary depending on the type of form you are on. For example, if you are on a Student form, you may need to enter the Term and ID number in the Key Block; if you are on a Finance form, you may need to enter a Fiscal Year and Index number in the Key Block.

Once you perform a Next Block function to move from the Key Block, you will be on the first block of the form and will continue to use Next Block to navigate to other blocks. A Next Block function can be performed several different ways:

1. Click on the Block menu, then Next, shown below.

![Next Block Menu](image)

2. Click on the Next Block icon located on the Toolbar.
3. On tabbed forms, click on the tab for the block.
4. Press Ctrl + Page Down on your keyboard.
5. Press the F2 key on your keyboard to access a list of blocks, and then click on the name of the block.
6. Right-click anywhere on a block to access a shortcut menu, and then click on the name of the block.

Once you have performed a Next Block function, you can use your tab key or mouse to move between fields.

**Rollback Function**

Performing a Rollback function returns you to the Key Block of a form. A Rollback function can be performed several different ways:

1. Click on the File menu, then Rollback.
2. Click on the Rollback icon located on the Toolbar.
3. Press Shift + F7 on your keyboard.
4. Right-click anywhere on a block to access a shortcut menu, and then click on Rollback.
Options Menu

Every form in Banner contains an Options menu, which is used to navigate to different blocks of the current form or to navigate to other forms containing related information. Click on the Options menu, and then click on an option to access it. There are also 2 shortcuts you can use to access Options:

1. Press Alt+O to open the Options menu, then press the underlined letter to access that Option. On SPAIDEN, for example, pressing Alt+O then the letter A will access the Address block.
2. Press the F2 key on your keyboard to open a complete list of Options, including navigation functions and a list of blocks, then click on an option.

Query Mode

Some forms open up in query mode. A query is done to look up data on forms that contain many records. The forms that open in query mode have the following instructions at the bottom of the form: Enter a query; press F8 to execute, Ctrl + Q to cancel. To use a form in query mode:

1. Click in any field and enter your search criteria.
2. Perform an Execute Query function by doing one of the following:
   - Press the F8 key on your keyboard
   - Click on the Query menu, then Execute
3. The query results will be displayed. To perform another query on the same form, click on the Query menu, and then Enter.

Exiting Banner 8

There are two ways to exit Banner:

1. Click on the File menu, and then select Exit.
2. Click on the Exit icon \(\times\) located on the Toolbar.
   - If you are on a form, the Exit command will close the current form (or block if you are on a block of the form). If you are at the Main Menu, the Exit command will allow you to exit Banner. If you choose to exit Banner completely, you will first be prompted with “Are you sure you want to exit this SCT Banner session?”
   - Click on Yes to exit Banner.

NOTE: After exiting Banner, the web browser window titled Oracle Application Server Forms Services will remain open – you can click on the Refresh button at any time to reopen the Banner window and log back in to Banner. If you are completely finished with Banner after logging out, simply close the window.
Where to Find More Information
You can access information about Banner and additional user guides by visiting http://www.ccsu.edu/bannersupport.