Banner Basics

An Introductory Guide to the Banner Information Systems (Banner SIS/FIS/HRIS) at Oregon State University.


Acknowledgement:
The materials in this document were developed by staff at Oregon State University based in part on SCT Corporation documentation for its Banner Systems.

Oregon State University, 1998
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Preface

*Banner Basics* is a training and reference tool for novice Banner users. It provides general information and helps for accessing and using the three Banner systems currently installed at Oregon State University. Separate Addenda for the Student Information System (SIS), the Financial Information System (FIS) and the Human Resource Information System (HRIS) present information unique to each system. You will receive a copy of the addendum appropriate to the system for which you are authorized after registering for a class.

Overview of Banner

Banner is a Graphical User Interface (GUI) software developed and maintained by the Systems and Computer Technology Corporation (SCT). The Administrative Computing staff provides software and user support by integrating OSU-specific enhancements to the Banner system.

The Banner software consists of a group of interrelated systems that control access to a common database. For example, data entered through SIS is shared with FIS and HRIS. Menus guide you through each system and its forms. All three OSU Banner systems use ORACLE database management software to store, manage, retrieve, and protect information.

1. **Banner/SIS** (Student Information System) is a collection of program modules, each associated with an area of student activity (e.g., admissions, registration). Some benefits:
   - Academic advisers have online access to student transcripts and are able to view academic histories.
   - Administrative offices are able to locate information and make it accessible to students quickly and efficiently.
   - University directors and department heads have comprehensive management information in order to monitor and optimize course offerings and faculty scheduling.
   - Students are able to register, adjust, or confirm schedules using a touch-tone phone, campus Kiosks, or the Web.

2. **Banner/FIS** (Financial Information System) modules provide a comprehensive, integrated financial management system that allows the tracking, maintenance, and processing of all relevant financial data. Some benefits:
   - Enables administrators and managers to view departmental and university financial information such as fund balances and budget status.
   - Enables accounting staff to pay vendors and reconcile departmental accounts.
   - Provides vendor payment history for review.
   - Provides document audit processing via the electronic approvals process.
   - Provides grants and contracts information online or through printed reports.
3. **Banner/HRIS** (Human Resource Information System) modules support functions necessary for payroll and human resource administration. Some benefits:

   - Allows Office of Human Resources’ representatives online access to employment histories.
   - Allows faster activation of new-employee payroll records.
   - Allows more efficient administration of payroll and benefits information.
   - Allows mass updates to OSU’s compensation system.
   - Allows employees to access certain employment-related records through the Web.

4. **GQL Data Warehouse** makes all Banner data available for ad hoc reports tailored to user needs. (See Appendix C for more information.)

**Banner Security**

OSU security policies and procedures are in place to protect the confidentiality of Banner information. Computer-level security prevents unauthorized access to the administrative computer system on which Banner resides. Form-level security controls access to Banner forms and, subsequently, to data that is accessed through those forms. Both levels of security are maintained through the use of a unique username and password combination.

A unique username and password must be entered each time a person logs into the Citrix Winframe Server. This provides protection against unauthorized access and multiple sessions by the same user. User access is granted to one or more of the Banner modules (FIS, SIS, or HRIS) at either the query or update level, based on the individual user’s needs. Query-level users are limited to accessing and viewing information, update-level users may also insert, delete, and modify information in the database.

**Accessing the Banner System**

1. **Hardware/Software Requirements**

   You can access a Banner system using your own desktop computer through the Citrix Winframe Server. To get access, you must have software called *WinFrame Client* installed on your computer. Your Departmental Computer Administrator (DCA) will be able to assist you. You or your DCA can get more information on the Web at this address: [http://osu.orst.edu/dept/computing/banner/gui](http://osu.orst.edu/dept/computing/banner/gui) or from Allen Greer, 737-2671.

2. **Getting Authorized**

   All new Banner users must be authorized to access the system by the appropriate authority and attend a “Banner Basics” class. To apply for authorization, use the Request for Access Banner Form included in the Addendum for the system you will use, or obtain the form as shown in this section.
For SIS: Access to Banner SIS requires two things: a completed “Request for Access Banner SIS” form (front and back) and attendance of an “Introduction to Banner SIS” class. The recommended process is to e-mail ISClass@orst.edu with a request to attend a class. You will then be sent a schedule of classes, a “Request for Access Banner SIS” form, and the pre-class materials. Access to the training system can be granted immediately by calling Administrative Computing Training at 737-8767. This will give you the opportunity to explore the system prior to class. If you have any questions about the process or the requirements, feel free to call the SIS Trainer.

For FIS: Access to Banner FIS requires two things: a completed “Request for Access Banner FIS” form and completion of the pertinent training. Forms are available from the Office of Business Affairs/MIS, Strand 31, or you may call 737-6040 to request one. Sign your form and obtain the signature of your department head, director, dean or vice provost. Send the completed form to Business Affairs/MIS. After the form has been received and approved, you must complete the FIS training. At the end of the class you will receive a memo assigning your username and password and describing your level of access to FIS.

For HRIS: Contact the Office of Human Resources at 737-3103 for a “Request for Access Banner HRIS” form. The form must be approved before attending an HRIS training class.

NOTE: All Banner users are expected to comply with OSU policies in regard to confidentiality and security of records. For further information, see the back of your access form or the Addendum for your system.

3. Getting a Username and Password

You will be assigned a unique username and password combination to log in to the administrative computer system and then into a Banner system. The purpose of the username and password is to ensure that only authorized users access the system. OSU policy requires that you use your own personal user name/password; do not share them.

Your username and “pre-expired” password are designated by the Database Administrator and given to you in a Banner Training Session (see Getting Banner Training for more information).

Username: Your username will remain the same unless you change departments. The format for a username is “OPSS” preceding a four-character department code, an underscore character (_), and a three-character unique user identification (usually the user’s initials, with “n” used as a placeholder when there is no middle initial). For example:

ops$regs_sss       ops$cbus_sns
Passwords: The security of data in each Banner system depends upon how well you select and protect your password. Because your original password is given to you in written form, you must change the password in your first Banner session. Follow these password guidelines:

- Passwords may range from 7 to 31 characters in length.
- Passwords must begin with an alpha character.
- Passwords must include at least one alpha (A - Z) and at least one numeric (0-9) or special character ($ or _).
- Choose a string of characters that will be easy to remember but will not be guessed easily by others.

To protect the security of your password:

- avoid using real words,
- avoid writing your password down or telling others,
- make sure no one is watching you enter your password, and
- change your password periodically.

Passwords may either expire or be disabled. When a password expires, you can enter the Banner system after changing your password. When a password is disabled, you must apply for a new password before entering the Banner system.

- Expired Password
  Your password will expire one hundred (100) days from the creation or last change date. You will begin receiving notification 14 days before expiration. If your password expires, when you log in, the Oracle Password Change Form, GUAPSWD (below) will appear.

![Oracle Password Change Form](Figure 1)

Your User ID is displayed. Enter your current password, the new password, then type the new one again to verify. Click **Save** and **Exit**. You have the option of changing your password before the expiration date. After logging in to Banner, type GUAPSWD in the Direct Access field at the top right of the screen and complete the form as above. **Note:** You cannot change your password more than once in any 24-hour period.
• Disabled Password
  Your password will be disabled under two conditions: you have 10 successive failed attempts to log on, or you have not logged on for 360 days. To reinstate a disabled password, you must go to the Central Computing Main Office, Milne Computer Center, Room 206, with picture ID, and ask to have your password reinstated. The new password will be pre-expired. When you first access Banner, you will be prompted to change it.

If you forget your password, you must follow the directions above to request a new one.

4. Banner Versions

• Production Version—PROD. This is the Production version for day-to-day activities which accesses the current version of Banner forms and is linked to the OSU database. When you log in, the form identification line (near the top of each form) displays PROD.

• Training Versions—DEV2 and DEVL. These two versions of Banner access past, current, or future versions of forms linked to two different test databases. New Banner SIS trainees who have applied for access to the Banner system can call Administrative Computing Training, 737-8767, to gain immediate access to the appropriate training version for their needs. When you log in, the form identification line displays either DEV2 or DEVL.

5. Logging In and Out

Logging In: From your desktop, start the PROD version of Banner. To access the system for which you are authorized, enter the username and your password (not case sensitive) in the Logon form:

```
| Username: [Type your username and [Tab]] |
| Password: [Type your password and [Enter]] |
| Database: Leave blank |

. . . or click Mouse in next field
. . . or click [Connect]

Figure 2
```

(To access the Banner Training system, start DEV2 or DEVL from you desktop and enter the training username and password. See Getting Banner Training.)

When you enter a valid username and password, the initial Banner screen displays. You are now in Banner. Click your system’s icon at the left of the screen to display your system’s main menu. Or, if you know the name of the form you wish to view, type that name into the Direct Access box at the top right side of the screen.
Logging Out: At the end of your session, you must log out of Banner in order to protect against unauthorized use. To log out of Banner, first execute the [Exit] function at any menu. At the Citrix Window, double-click the Exit - Logoff icon. This releases the space reserved for your session and makes it available for someone else.

Getting Banner Training

An important part of getting started with Banner is attending a Banner training session. Please read Banner Basics before you attend the training session.

Signing up for Banner Training: The navigational Banner training sessions provide basic introductory information about Banner, including format of forms and navigating menus and forms.

1. SIS: Administrative Computing offers SIS Banner training sessions at least once a month. You can sign up for the next session by sending e-mail to the Information Services workshop registrar at: ISClass@orst.edu or registering on the Web at: http://osu.orst.edu/dept/isteach/isclass.htm

2. FIS: Business Affairs/MIS offers FIS Banner training sessions at least once a month. You can register for the next session by calling MIS at 737-6040.

3. HRIS: Training sessions and registration procedures will be announced through the HRIS newsletter and the HRIS Web site at: http://osu.orst.edu/admin/hristeam/index.htm

Training Username and Password: SIS trainees may use the Training System before the class to begin exploring Banner, including the menu structure, forms and navigation aids, naming standards, available functions, and sample queries. To access the current Training system, call 737-8767 for a username and password. FIS trainees will receive a training username and password at their first training session.
Understanding Banner Forms

In this document, the following typestyles denote specific elements of Banner.

- **Functions**, commands that generate some activity, are in capitals and lower case, enclosed in brackets:
  
  [List Of Values]

- **Parts of a form** are in bold italics, caps and lower case:
  
  *Key Block*

- **Data names** (fields, blocks, etc.) are in caps and lower case:
  
  Last Name

- **Messages** (at bottom of form) are enclosed in “less than, greater than” symbols:

  <Query cancelled>

At this point, you may find it helpful to refer to Appendix B, *Banner Basics Terminology*, before continuing. For more help in understanding Banner forms, see *Learning to Navigate in Banner* and Appendix A, *Banner Function Key Map*.

1. Form Names in Banner

Banner forms follow a standard naming convention. Names are seven characters long. The **first character** of the form name identifies the primary Banner system to which the form belongs, for example:

- G = General
- S = Student
- F = Finance
- P = Human Resources/Payroll
- N = Position Control/Payroll

See the Addendum for SIS, FIS, or HRIS for additional information about form-naming conventions and specific form-naming examples.

2. Types of Banner Forms

Three basic types of forms are available to Banner users.

- **Menus** enable you to move through Banner. The SIS, FIS, and HRIS Addenda include information about using menus.

- **Functional (or application)** forms perform specific update and retrieval functions and enable you to query for specific information.

- **Validation** forms enable you to view the values defined for a field.

The following samples illustrate layout and content of three types of Banner forms.
3. A Menu Form Sample

A. A *Form Menu Bar* contains *Drop-down Menu* options. Click on the menu name and then select the desired action from the list.

![Banner2000 Menu Bar](image)

**Figure 5**

B. The *Tool Bar* provides another method to perform many Banner functions. Click an icon to perform the following actions:

1. Save or Commit button  
2. Rollback button  
3. Insert or Add Record button  
4. Remove or Delete Record button  
5. Enter Query button  
6. Execute Query button  
7. Cancel Query button  
8. Previous Record button  
9. Next Record button  
10. Previous Block button  
11. Next Block button  
12. Print button  
13. Graph Information (*feature not available*)  
14. Show Keys button  
15. Documentation (*feature not available*)

![Banner2000 Tool Bar](image)

**Figure 6**
C. The **General Menu** gives you access to your system’s main menu. Click on the system name and continue through the menu structure to reach the desired form.

D. These **Icons** give you access to your system’s main menu. Select the correct system and continue through the menu structure to reach the form you want. Or you may enter the form name in the Direct Access field.

E. The **Direct Access** field is the **Current (active) Field**. Enter the name of the form you want here (e.g., SPAIDEN for SIS users) and [Enter] for quickest access.

F. **Buttons** are named, shaded rectangular areas in a form. Clicking on a button may take you to another window or form or execute a process within the current form. What happens depends on the individual button. (See also 4, I and J.)

G. The **Auto Help Line** provides online help. (See *Getting Help Online.*)

4. A Functional Form Sample

A. The **Form Identification Line**, at the top of the form, includes the form name and form version. This line changes based on how you logged into Banner (Production or Training versions). See *Banner Versions* for more information.
B. The **Key Block**, near the top of the form, provides or requests information needed to access data. For menus and validation forms, the key blocks are permanently coded. For functional forms, the information in the key block is normally entered by the person making the query. **Key Block** information, such as **ID Number**, is used to access the database and retrieve data.

C. The **Block Line** indicates the break between **Data Blocks**. Use [Next Block] to move the cursor to the next data block that has at least one enterable field. If the area is in another window, that window will be opened.

D. **Data Blocks** contain collections of data **Fields**. The **Field Name** precedes the **Field**. Fields may be empty when the form is first displayed. The fields are filled, either by you or Banner, as you progress through the form. You can enter, query, or change information in a field. When a field is enabled or “enterable,” the field text appears in black. When a field is disabled or “display only,” the text is gray. The information in each data block is stored in the database as one or more **Records**.

E. Clicking on a **List of Values**, or **LOV**, **Button** will take you to a pop-up window that typically contains the codes and descriptions that are entered on a validation form. You may [Select] one of the codes to return it to the current form.

F. A **Pull-down List** is a list of two or more possible values for a field. If an arrow appears at the right side of the field, then the field has a pull-down list. The default entry appears inside the field. You may select a different value from the list.

G. A **Check Box** is a field that can be toggled on or off. Often it is a “yes/no” indicator, with a check indicating “yes.”

H. **Radio Groups** are groups of two or more **Radio Buttons**. Each **Radio Button** represents one possible choice from the group. Choices in a **Radio Group** are mutually exclusive; only one **Radio Button** may be selected. In the sample, **Radio Group** choice A is selected.

I. **Option Buttons** that may appear next to the **Standard Buttons** are different for each form. When clicked on, an **Option Button** may take you to a branch window, a pop-up window, or may execute a process. The button’s name tells you what it will do. The Options drop-down menu has an equivalent menu selection for each **Option Button** on a form.

J. These three **Standard Buttons** appear on most forms. Each provides a specific action for the form. **Rollback** takes you back to the **Key Block**, deleting any unsaved data in the form’s data blocks. **Save** saves entered data. **Exit** closes the current form.
K. The **Record Indicator** on the Auto Help Line at the bottom of the form, indicates the current location within the list of records. It shows the number of the current record and the total number of records on the form, e.g., [Record: 5/27] indicating record 5 of a possible 27 records. A ? after the slash indicates that there are more records.

L. **More…** appears in the lower right corner of each form that has additional windows with more block(s) of information.

5. **A Validation Form Sample**

If a validation (List of Values) form is available for a field, the field name is a **LOV Button**. You may click the button to access the form, in this case an Address Type Validation table.

![Address Type Validation Form](image)

A. The **Find** field allows you to use a Wildcard search to limit the list of valid values. Enter the search criteria, using the Wildcard %, before and/or after, and click **Find** to search the list for all entries that match your criteria.

B. This sample validation form lists codes and descriptions of address types valid for OSU.

C. **Horizontal and Vertical Scroll Bars** allow you to [Arrow] left and right or up and down for additional information or more items in a list.

D. Clicking **OK** returns you to the form you are in with the highlighted value.

E. Clicking **Cancel** exits out of the list without bringing back a value.
Learning to Navigate in Banner

Understanding menus, form formats and content, form names, and navigation aids will help you use Banner forms efficiently. Navigation tools specific to SIS, FIS, and HRIS are included in the Addendum for each Banner system.

1. Navigation Tools

- **Mouse:** In the Banner system, you may use the mouse to move between fields within a window, to access drop-down menus, and to activate buttons.

- **Drop-down Menus:** Clicking on any selections in the *Form Menu Bar* above the *Form Identification Line* will allow you to access all navigation functions.

- **Keyboard:** The keyboard is sometimes required for navigation. There are keystroke sequences for all navigation functions. You may prefer using keystrokes, for instance, pressing the *TAB* key to move from field to field within each block of a form.

- **Auto Help Line:** The messages that appear in this line in the gray area at the bottom of the form can provide basic navigation guidance. For more information, see *Getting Help Online*.

2. Navigation Functions

These common navigation functions can be carried out with mouse, menus, and/or keyboard.

- [Next Field] and [Previous Field] are used to navigate within a specific data block on a form. Mandatory fields must be completed before moving to the next field or returning to the previous field.

- When the lettering in a button is black, the button is operable. When the lettering in a button is gray, the button is display only. The Enter key will operate a button that is outlined in black.

- The [Next Block] and [Previous Block] functions are used to navigate between data blocks.

- [Exit] returns you to the preceding form or menu. **Note** that in *any* window of a form, when the form identification line shows the same form name, [Exit] will take you completely out of the form. Any unsaved information you have entered will be lost.
• The [List of Values] function takes you to a validation form from which you may select a value for a specific field (see 4.E, page 10).

• The [Rollback] function clears the current form of data (except Key Block information) and moves the cursor to the Key Block.

• [Help>Keys] on the Form Menu Bar lists keystrokes for available field-specific functions.

At this point, you may find it helpful to refer to Appendix A, Banner Function Key Map, for a list of Banner functions and keystrokes required to invoke a function from your computer.

**Keystroke Warning:** Banner remembers and processes every keystroke you type. If you press a key and nothing happens, check the Auto Help Line message. When Banner is processing a function (e.g., Query), the Auto Help Line displays “Working...” Do not press any keys during this time unless you are aware of the outcome.

3. Customizing Your Screen

• **Minimizing the Citrix/Banner screen.** A Banner form’s appearance on a computer screen is determined by the size of the monitor and the screen resolution. A larger monitor with a higher resolution (e.g., 1024 x 768), gives a view of the entire Citrix screen. Click the minimize button in the top right corner of the Citrix session bar to minimize a Banner screen and get back to your desktop.
If you have a smaller monitor and a lower screen resolution (e.g., 640 x 480), the Citrix title bar will not be visible at the top of your screen. Press Alt+Star (*) on the number pad to move the Citrix screen down and gain access to the minimize button.

- **Moving the Auto Help Line.** In either screen resolution, the gray Auto Help Line drops below the form. For easier viewing, move the Auto Help Line up by following these steps:

  - Place the cursor on the double line at the bottom of the gray bar;
  - adjust the placement of the cursor until a double arrow appears;
  - hold the left mouse button down while moving the line up; and
  - release the button to check the placement of the line.

*Note: If scroll bars appear, lower the line slightly to remove.*

### Getting Help Online

Banner provides four different types of online Help:

1. **Auto Help Line**
   The *Auto Help Line*, the first line in the gray field at the bottom of the window, is a location for messages. The message changes automatically, dictated by the field you are in or an action you have taken. *Auto Help* gives information about the data field, including its name, the type of data to enter and/or the format to use. It also tells you if related data is available, e.g., [List of Values], and/or what action to take after entering a value. This line will also display informative or error messages such as `<Query caused no records to be retrieved. Re-enter>`. The *Auto Help* text message will change if you move the cursor or if another message is displayed.

   **Tip:** When using Banner, it’s a good idea to pay attention to the *Auto Help Line*!

2. **Help in the Form Menu**
   [Show Keys]. When you click the [Show Keys] icon on the Tool Bar or [Help>Show Keys], Banner displays a list of the functions and the associated keystrokes that are active for the current field. It is important to note that some functions change in meaning from form to form, while others are only valid for certain circumstances. *Appendix A, Banner Function Key Map*, gives the same type of information for the function keystrokes associated with your computer.
3. Dynamic Help

Note: Dynamic Help may not be consistently available.

Banner offers field-sensitive help at the form, block, or field level. When you request Dynamic Help (by choosing [Help>Dynamic Help Query]), the form GUAHELP displays. If the message “Help Exists” is checked, you may select either “Banner” or “Local” help for the selected field.

To select an option, click the circle to its left, then click the button.

A. **Form** provides detailed information about the form, including its purpose, and processing notes about the form. It also identifies other forms that supply data appearing on the form and what prerequisites, if any, must be completed.

**Block** provides detailed information about the block, including the block’s purpose and functions allowed, and identifies any prerequisites that must be completed.

**Field** provides a brief field description, the field usage notes, and the field’s characteristics, such as data type, length, whether the field is defined in the database, whether the field is fixed in length, and whether the field is mandatory.

B. **Banner 2000** provides information prepared by SCT.

**Local** help is currently being maintained at a minimal level at OSU.

Click **Cancel** to leave the displayed information. Click **Cancel** again to exit the GUAHELP form.
## Appendix A: Banner Function Key Map

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<th>Function</th>
<th>Keys</th>
<th>Function</th>
<th>Keys</th>
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<tbody>
<tr>
<td>ACCEPT (SAVE)</td>
<td>F10</td>
<td>LIST OF VALUES</td>
<td>F9</td>
</tr>
<tr>
<td>BLOCK MENU</td>
<td>F5</td>
<td>NEXT BLOCK</td>
<td>Ctrl+Page Down</td>
</tr>
<tr>
<td>CLEAR FORM</td>
<td>Shift+F7</td>
<td>NEXT FIELD</td>
<td>Tab</td>
</tr>
<tr>
<td>CLEAR BLOCK</td>
<td>Shift+F5</td>
<td>NEXT RECORD</td>
<td>↓</td>
</tr>
<tr>
<td>CLEAR ITEM</td>
<td>Ctrl+U</td>
<td>NEXT SET OF RECORDS</td>
<td>Ctrl+&gt;</td>
</tr>
<tr>
<td>CLEAR RECORD</td>
<td>Shift+F4</td>
<td>PREVIOUS BLOCK</td>
<td>Ctrl+Page Up</td>
</tr>
<tr>
<td>COUNT QUERY HITS</td>
<td>Shift+F2</td>
<td>PREVIOUS FIELD</td>
<td>Shift+Tab</td>
</tr>
<tr>
<td>DELETE RECORD</td>
<td>Shift+F6</td>
<td>PREVIOUS RECORD</td>
<td>↑</td>
</tr>
<tr>
<td>DISPLAY ERROR</td>
<td>Shift+F1</td>
<td>PRINT SCREEN</td>
<td>Shift+F8</td>
</tr>
<tr>
<td>DUPLICATE ITEM</td>
<td>F3</td>
<td>REFRESH PAGE</td>
<td>Alt, A, R</td>
</tr>
<tr>
<td>DUPLICATE RECORD</td>
<td>F4</td>
<td>SAVE TRANSACTION</td>
<td>Alt, A, S</td>
</tr>
<tr>
<td>DYNAMIC HELP</td>
<td>Alt, H, Y</td>
<td>SCROLL UP</td>
<td>Page Up</td>
</tr>
<tr>
<td>ENTER QUERY</td>
<td>F7</td>
<td>SCROLL DOWN</td>
<td>Page Down</td>
</tr>
<tr>
<td>EXECUTE QUERY</td>
<td>F8</td>
<td>SCROLL LEFT</td>
<td>←</td>
</tr>
<tr>
<td>EXIT/CANCEL</td>
<td>Ctrl+Q</td>
<td>SCROLL RIGHT</td>
<td>→</td>
</tr>
<tr>
<td>EXIT WITH VALUE</td>
<td>Shift+F3</td>
<td>SELECT</td>
<td>Space Bar</td>
</tr>
<tr>
<td>HELP</td>
<td>F1</td>
<td>SHOW KEYS</td>
<td>Ctrl+F1</td>
</tr>
</tbody>
</table>

**Note:** Items separated by a comma (e.g., [Alt, A, S]), require you to press and release each key before you press the next key. Items separated by a plus sign (e.g., Shift+F1), require you to press and hold the first key down, press the second key, and then release both.
Appendix B: *Banner Basics* Terminology

**Action Menu:** a drop-down menu listing navigation and command functions.

**Application Form (also Functional Form):** a form used to enter, update, and query information in Banner.

**Block:** a section of a form containing related pieces of information. For example, Banner forms may include a key block at the top which identifies the form, and one or more framed data blocks, each focusing on one group of data.

**Button:** a shaded rectangle preceding a field that, when clicked, performs some function, e.g., List of Values, move to a different form, etc.

**Citrix Session Window:** the open window in which Banner form windows are placed. Used to minimize a session.

**Database:** a collection of data tables where all Banner data are stored.

**DCA:** Departmental Computer Administrator.

**DEVL:** a Banner version that contains a collection of test data and the pre-release version of forms.

**DEV2:** a Banner training database that contains a collection of test data to be used by trainees.

**Field:** a data item within a block. For example, an address information block may include fields such as address, city, state and zip code.

**Form:** the general term for a Banner screen display. A form may be either a single page or a series of pages.

**Function:** a Banner command that generates some on-screen or database activity. An example is [List of Values]. The function may be abbreviated using the first letters of the command, such as LOV. In *Banner Basics*, these commands are shown in capitals.

**Function Keys:** the keys on your keyboard that you may use to execute various Banner functions. The Banner Function Key Map (Appendix A) lists functions and their required keystroke combinations.
**Functional Form (also Application Form):** a form used to enter, update, and query information in Banner.

**GUI:** Graphical User Interface, a Windows-driven software that supports the use of a mouse for navigation.

**Help:** lines and screens of information that provide immediate assistance with Banner forms, blocks, and fields.

**Key Block:** appears at the top of each type of form and provides or requests information needed to access data.

**List of Values:** a list of possible values for a field, generated by clicking the List of Values (LOV) button next to the field. Value lists are displayed only for those fields that have an associated table of values in the database.

**Menu:** a list of choices displayed on the screen to allow Banner users to select a module, menu, or form.

**Modules:** the program components of the Banner system; each module is affiliated with a particular function, such as admissions or registration (SIS), accounting (FIS), or payroll or benefits (HRIS).

**Mouse:** a navigation device that can be used to move between fields and blocks within a window, access drop-down menus, and activate buttons.

**Navigation:** a term commonly used to describe the process of maneuvering in and between modules and forms.

**Online:** describes the access method used in Banner sessions. Changes made to the data are immediately available to all Banner users. The modules, forms, data and help facilities are online.

**ORACLE:** the database management software used by the Banner system to store, manage, and retrieve information.

**Query:** a request to retrieve and display information from the database.

**Record:** a collection of data fields that are stored and retrieved within the database as a single unit. One or more records may be included in one block of a form.
**Scroll Bar:** a horizontal or vertical bar that appears at the bottom or side of a form window. Clicking the arrows at each end of the bar allow you to view hidden columns in the form.

**Table:** how information is organized in an ORACLE database. Tables are made up of columns and rows. Each column contains one kind of information (e.g., ID number, name, etc.) and each row contains one set of information (e.g., one row for each person).

**Value:** data that is entered or displayed in a field.
Appendix C: GQL Data Warehouse

What is the OSU Data Warehouse?
The OSU Data Warehouse is a consolidation of information from the Banner database (FIS, SIS, HRIS), organized in ways that make sense to the end-user. The OSU Data Warehouse also functions as a standardized reporting tool for Financial and Student and Human Resource information.

What type of information is available?
The OSU Data Warehouse is divided into a number of functional areas, each addressing a different need within the university.

• The Finance (FIS) Data Warehouse contains information regarding many financial transactions including: grants and contracts, purchase orders, journal vouchers and payroll.
• The Student (SIS) Data Warehouse contains information about student activity such as recruitment, admission, registration, transcript history, degrees awarded, and GPA summaries.
• The Housing Data Warehouse contains information related to enrollment in OSU’s dorms and other housing facilities.
• The Accounts Receivable (AR) Data Warehouse contains information related to student and non-student accounts that are due to the university.
• The Human Resources (HR) Data Warehouse contains information related to employees of OSU, such as tenure status and vacation leave.

How do you access any OSU Data Warehouse?
Each of the Data Warehouses listed above conducts training classes that introduce the types of information available and the special considerations for dealing with information specific to that Data Warehouse. Access to any part of the OSU Data Warehouse is only granted after training has been completed.

What software is used to access the OSU Data Warehouses?
All of the OSU Data Warehouses are accessed by using a reporting tool called GQL from Andyne Computing Inc. GQL is provided free to campus users as the university has a site license for this software. Following are hardware and software requirements:

• Windows 3.1, Windows for Workgroups 3.11 or Windows 95 running on a 386/33 PC or better - or - a Macintosh running System 7 or higher.
• A campus network connection with TCP/IP access.
• GQL and SQL*Net installed (contact your departmental computing administrator (DCA)).
• Experience using MS Windows or a Macintosh with a mouse.

Where do you go for more information?
• The Data Warehouse web page at http://osu.orst.edu/dept/computing/warehouse/
• Student Data Warehouse, Allen Greer, 737-2671
• Finance Data Warehouse, FIS Hotline, 737-5950, or http://www.lucre.orst.edu/dwhome01.htm
• Human Resources Data Warehouse, Jacque Rudolph, 737-3103, or Brad Dennis, 737-2077

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