

Banner General Navigation and Fundamentals Training Workbook

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SunGard Higher Education
4 Country View Road
Malvern, Pennsylvania 19355
United States of America
(800) 522 - 4827

Customer Support Center website
<http://connect.sungardhe.com>

Distribution Services e-mail address
distserv@sungardhe.com

Other services

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04/30/2008	New version that supports Banner General 8.0 software.
09/25/2008	Minor revisions that support Banner General 8.0 software.

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Think before you print.

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Introduction



Course goal

The goal of this workbook is to provide you with the knowledge and practice to accurately navigate through Banner. This workbook is divided into five sections:

- Banner Forms
- Main Menu
- Menu Bar
- Toolbar
- Help Features

Course objectives

At the conclusion of this course, participants will be able to

- describe forms, their components and their naming conventions
- explain form relationships
- describe fields, blocks, and records
- search for items in a database
- describe and navigate through the Banner Main Menu
- describe and utilize the functions in the Banner menu bar
- describe and utilize the icons in the Banner toolbar
- describe and access the types of help in Banner.

Intended audience

All Banner users.

Prerequisites

Before completing this course, you should have familiarity with

- using a computer and mouse
- Microsoft Windows Navigation.

Banner Product Suite

Introduction

What is the Banner product suite?

- All-encompassing internet-native software applications for the higher education community.
- Supports functions that need to be carried out for an institution to run efficiently.
- Comprised of various Banner products that have the ability to interface with each other for the purpose of accomplishing necessary tasks.

Suite products

The Banner product suite consists of six products. Your institution may have licensed all or only some of the products.

- Banner General*
- Banner Advancement
- Banner Finance
- Banner Financial Aid
- Banner Human Resources -- Payroll/Position Control
- Banner Student

* Included when any of the other products are licensed.

Interfacing Banner products

Banner products have the ability to interface with each other for the purpose of sharing information and making transactions.

Example: The Banner Human Resources system will interact with the Banner Student system to find out which students are employed and how much they should be getting paid.

Main Menu



Section goal

The goal of this section is to identify Banner Main Menu and its components.

Objectives

After completing this section, you will be able to

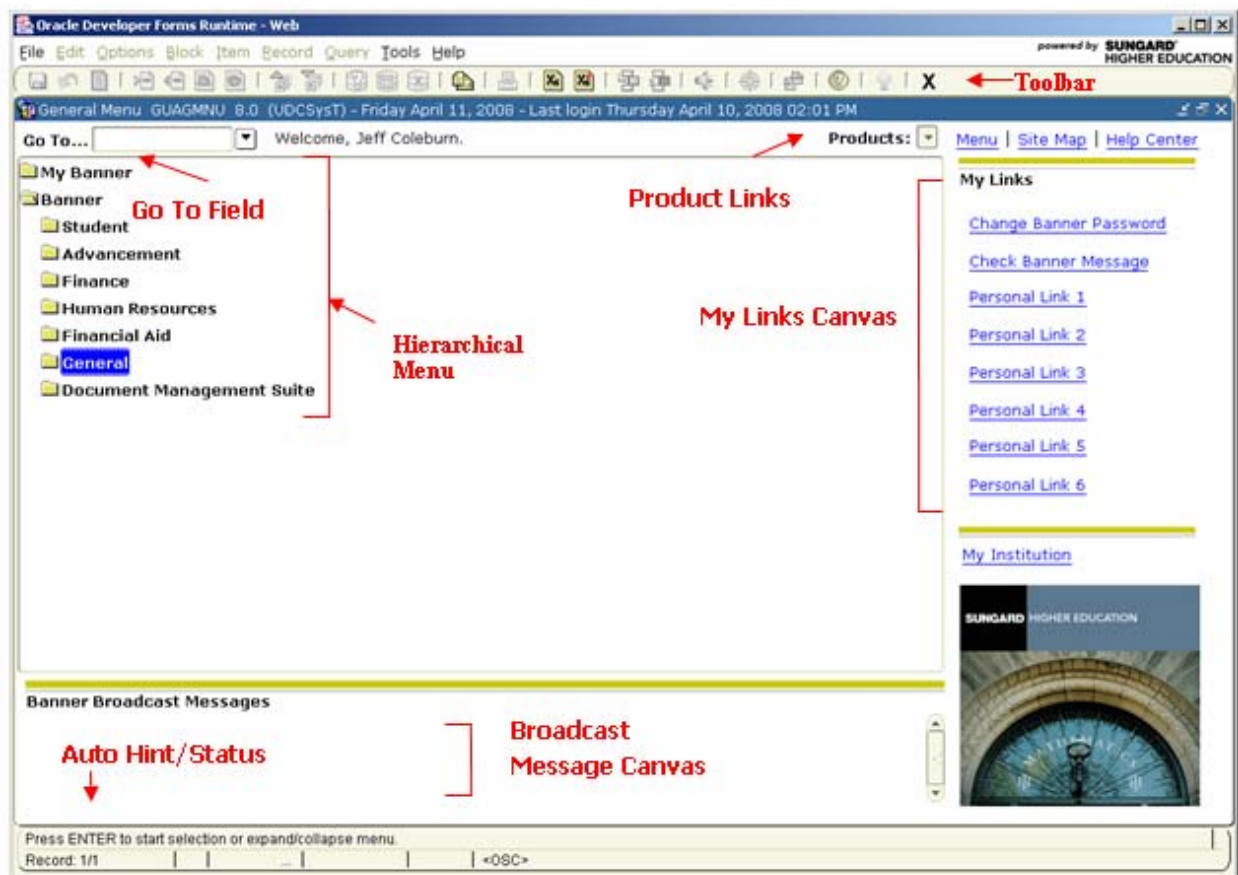
- describe the areas of the Banner Main Menu
- navigate through the Main Menu hierarchical structure
- utilize methods for accessing forms
- define and run a QuickFlow
- create, change, and copy My Banner.

Banner Main Menu

Introduction

The Main Menu provides an overview of the menus, forms, jobs and QuickFlows on Banner. You use the Main Menu to navigate through Banner.

Parts of the main menu



Parts description

The following chart details the different areas of the main menu.

Menu Part	Description
Menubar	Offers a variety of options for navigating within Banner. However, from the main menu, the options are limited.
Object Search	Access a form, job, or QuickFlow if you know part of its name, description or type.

IF	THEN
you use object search from a form	the current form remains open.
you exit the requested object	you return to the original form.

Toolbar	Set of icons that represent shortcuts for performing common functions from the main menu.
Auto Hint/Status Line	Describes the field where the cursor is located. Displays error and processing messages. Explains the purpose of the field, what can be done next, or how to access another window or form.
Hierarchical Tree Menu Structure	Access forms through the main menu hierarchical tree structure.
Product Links	Access contents of various Banner products directly.
My Links Canvas	The Change Banner Password link goes to the Oracle Password Change Form (GUAPSWD), where you can change your password. The Check Banner Message link takes you to the Banner Message Form (GUAMESG), where you can view your messages. A green check mark appears next to the link when you initially log in and have pending messages, or whenever a new message arrives. The pop-up alert for new messages is no longer displayed. Personal links enable you to create up to six links to favorite URLs or often-used Banner objects.
Broadcast Message Canvas	The Broadcast Message button on the toolbar becomes enabled whenever you receive a broadcast message. You can view your message(s) in the Broadcast Messages section at the bottom of the screen.

Hierarchical Menu

Introduction

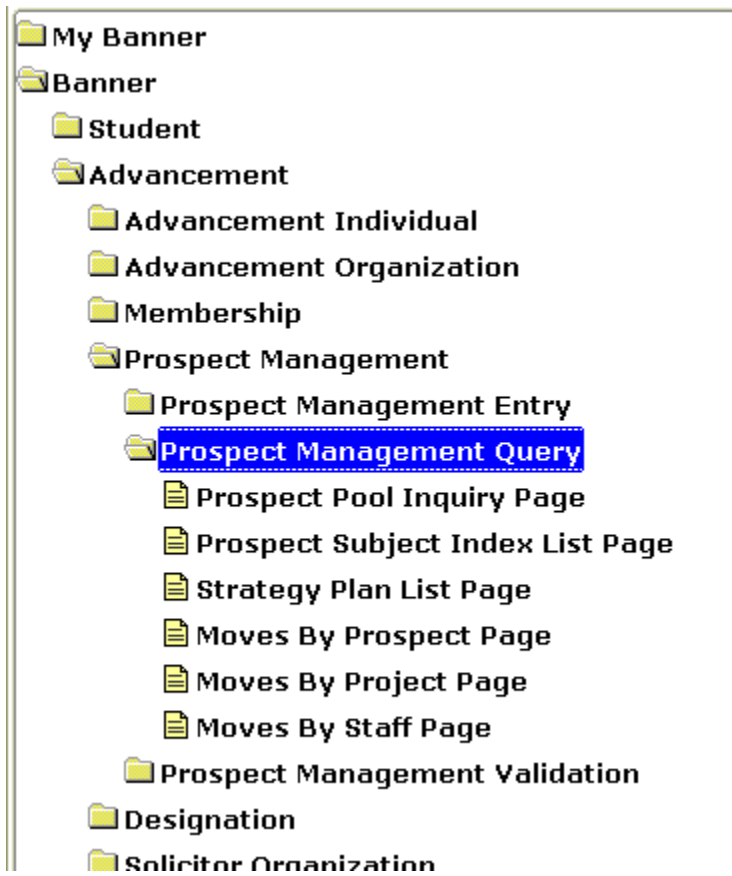
When accessing Forms from the Main Menu they are displayed as a hierarchy. You can expand and collapse content by clicking on the folders.

Closed folder	Select the closed folder to the left of an item to expand and view items contained under it.
Open folder	Select the open folder sign to collapse the menu into the original item.

Banner menu



Traversing the tree hierarchy



IF	AND	THEN
you click the closed folder to expand	you see more closed folders	it can be expanded further.
you click the closed folder to expand	you see the open folder	it cannot be expanded further.
the menu cannot be expanded further	you see the form that you want	double-click on that form to access it.

Accessing Forms

Introduction

The most commonly used ways to access forms are:

- Hierarchical menu
- **Go To...** Field from the Main Menu
- **Go To...** Field accessed by F5 function from a form
- **Options** Menu from within a form
- List of forms accessed during current Banner Session stored in the File Menu
- Direct Access Form (GUAPARM)
- Site Map

Hierarchical menu

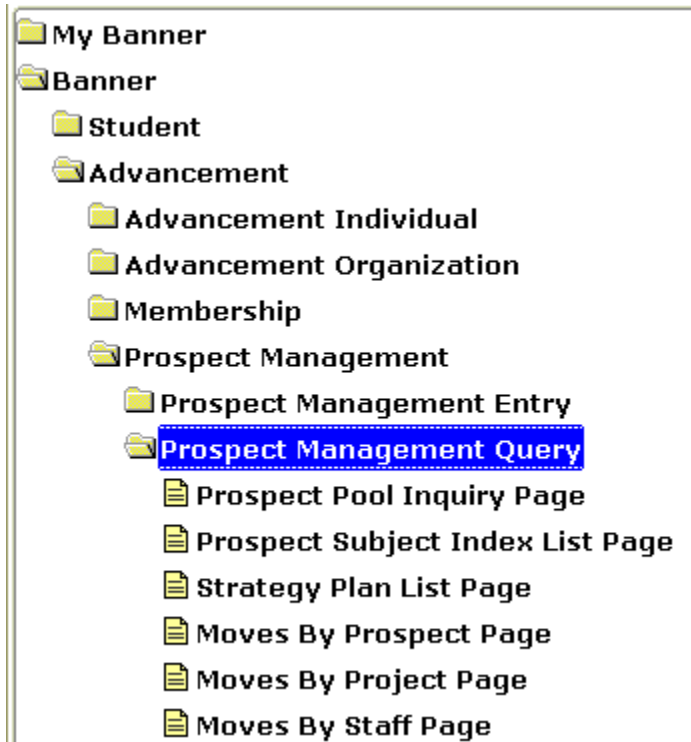
Access forms using the Hierarchical Tree Menu.

Steps

Follow these steps to complete the process.

1. Find the product area that you wish to access.
2. Double-click on the closed folder next to the product to expand the menu.
3. Double-click the form you would like to access or expand an area further by clicking the closed folder.

Banner menu



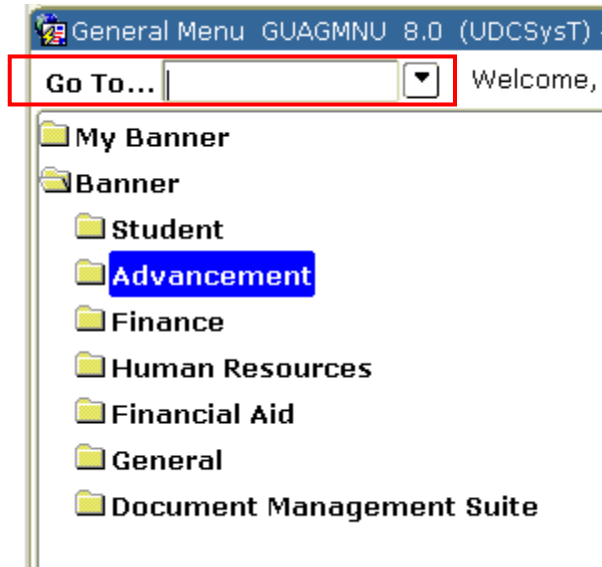
Main menu 'Go To...' field

You can access a form from the **Go To...** field above the Main Menu, if you know the seven-character code of the form you wish to access. You may also use the up and down arrow keys in the **Go To...** field to access forms you have previously opened during your current Banner session.

Steps

Follow these steps to access a form from the Main Menu.

1. Enter the form's seven-character code in the **Go To...**field.



2. Press **Enter** or **Tab**.

'Go To....' field called by F5 key

Forms can be accessed via the **Go To...** field called by F5 Key, if you know the seven-character code of the form you wish to access. You may also use the up and down arrow keys in the **Go To...** field to access forms you have previously opened during your current Banner session.

Steps

Follow these steps to access a form via the F5 key.

1. Press the **F5** key.



The screenshot shows a web browser window with the title 'Activity Type Validation - STVACTP - 8.0 - (UDCSysT)'. A red box highlights the 'Go To...' field and the 'My Institution: <http://www.sungardhe.com/>' text. Below this is a table with the following data:

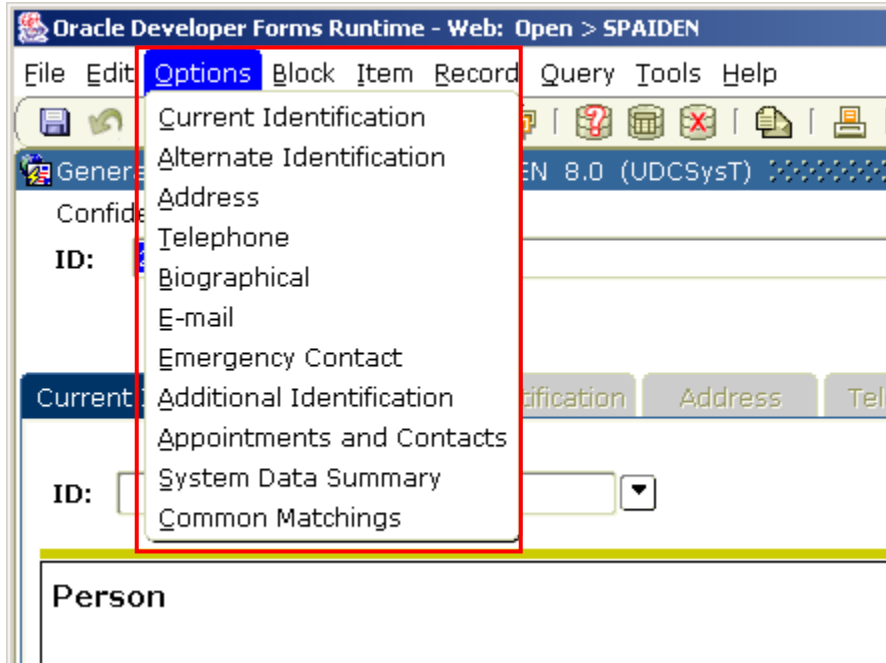
Type	Description	System Req	Activity Date
ACADM	Academic	<input type="checkbox"/>	22-JAN-1992
ADVIS	Advisor	<input type="checkbox"/>	03-JUL-2001
ATHLE	Athletics	<input type="checkbox"/>	15-NOV-1991
CARRG	Career Guidance	<input type="checkbox"/>	03-MAY-2000
CHPTR	Chapter / Club	<input type="checkbox"/>	22-JUN-2003

2. Enter the form's seven-character code in the **Go To...** field.
3. Press **Enter** or **Tab**.
4. Press the F5 key again to close out the **Go To...** window.

Options menu

Forms can also be accessed from the **Options** Menu within a form. When you are in most forms Banner lists related forms in the **Options** Menu. You may access these forms by choosing them from the **Options** menu and when you close out of the chosen form you will be taken back to the original, or 'Calling,' Form.

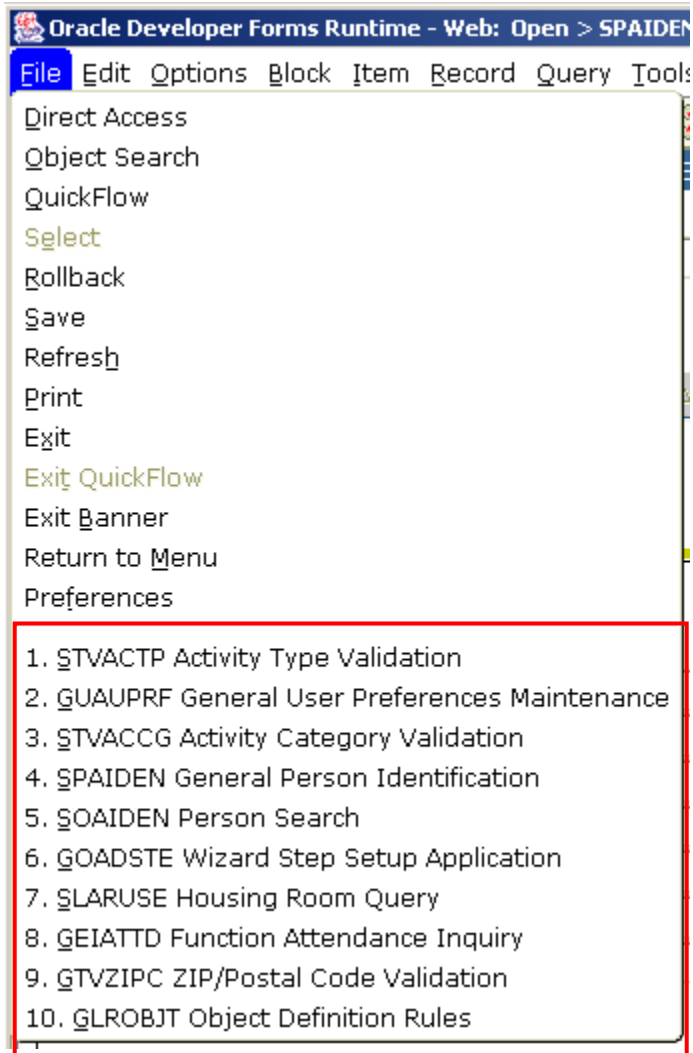
Banner form



List of forms stored in the File menu

Forms can be accessed from the list of forms that are stored in the **File** Menu. Banner retains a list in the **File** menu of the forms you have accessed during your current Banner session. You may quickly access these forms by clicking on the **File** menu and choosing the form from the list. The list is refreshed each time you log out and log back in to Banner.

Banner form



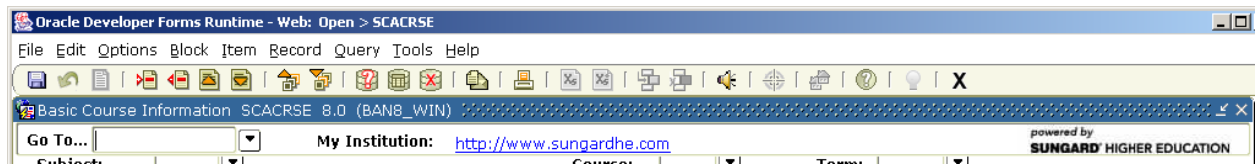
Direct access

Use the Direct Access function for quick access if you know a form's seven-character code.

Steps

Follow these steps to complete the process.

1. While in a form, from the menu bar, select **File**.
2. Select the **Direct Access** option. This will call up a subwindow containing the **Go To...** field, which enables direct entry of the code names of Banner forms, reports and processes.

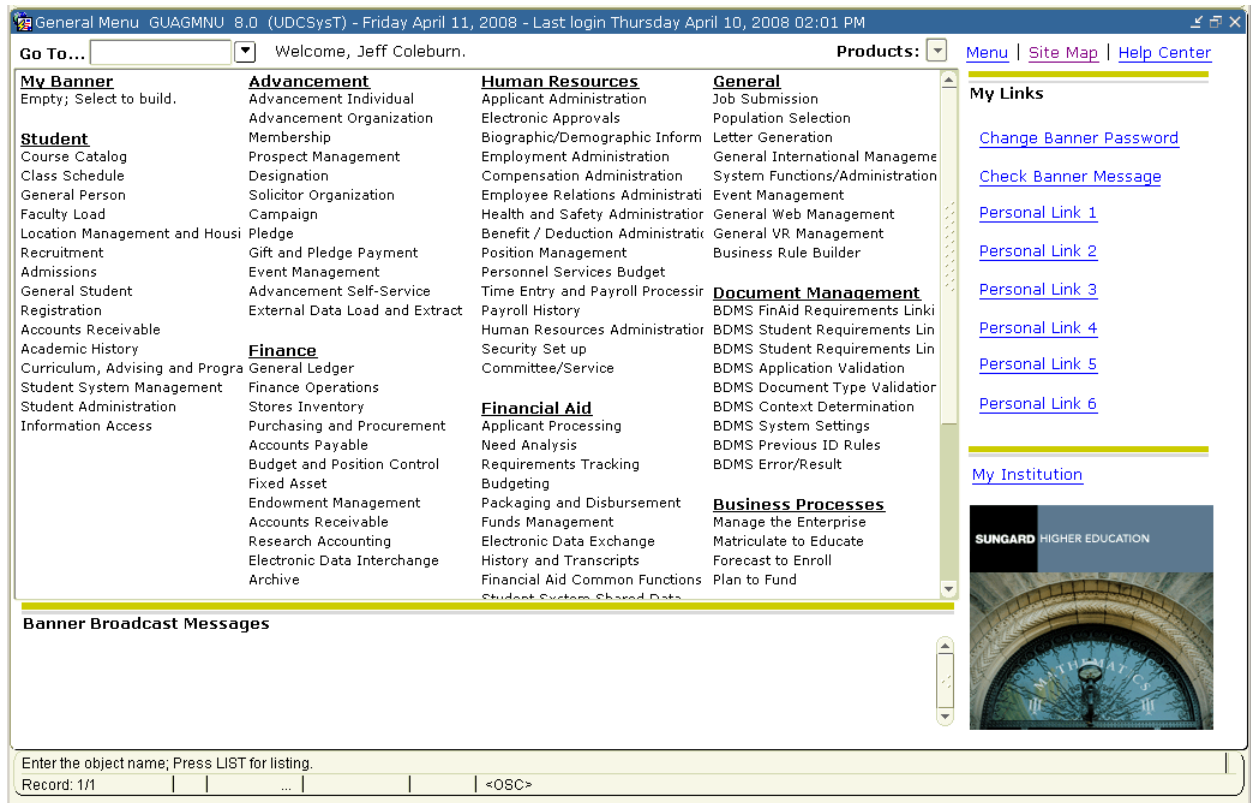


3. Enter a valid seven-letter code of a form in the **Go To** field, then press **Enter**.

Site map

The site map is accessible by selecting the site map link [Site Map](#) from the main menu. It will list top –level menus and one level below them. No fields are listed, just links to various menus and forms.

Banner form



Using the site map

The following chart explains how to utilize the site map.

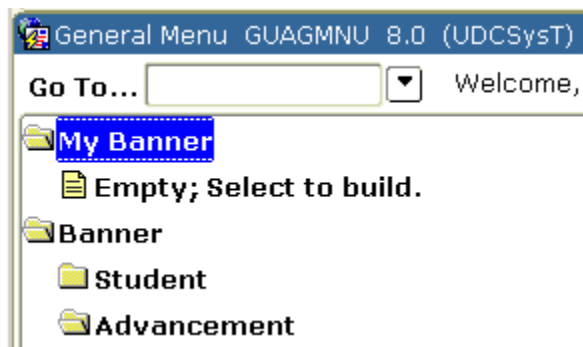
IF	THEN
you select a product from the site map	the main menu displays the product you selected with one level expanded.
you select a form, process, or QuickFlow	it will be displayed.

My Banner

Introduction

My Banner appears at the top of the Main Menu. It allows quick access to forms, jobs, menus, and QuickFlows that are most important in your daily work.

Banner menu



Setting up My Banner

The following forms are used to create, change and copy My Banner.

Form	Code	Purpose
Personal Menu Maintenance	GUAPMNU	Create and change your personal menu.
Personal Menu Maintenance and Copy	GUTPMNU	Copy your personal menu to or from another user.

QuickFlows

Introduction

A quickflow allows you to access a set of form in a specific sequence.

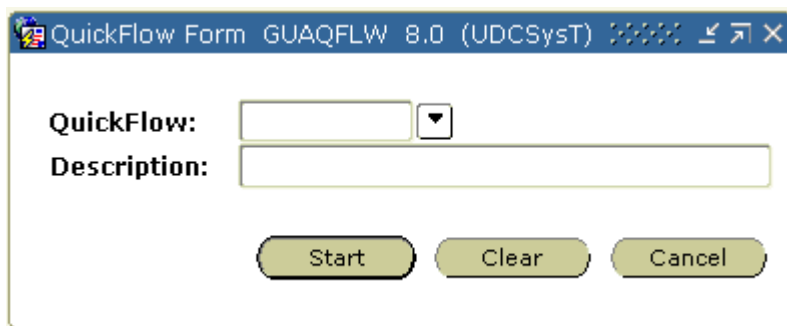
Example: One of your responsibilities includes entering new students into the system. You may define a QuickFlow that accesses all of the forms required for that task so that you do not have to go through each required form from the menu.

Action	Benefit
Allows for access to a set of forms in a specific sequence.	Enables a task to be accomplished both efficiently and completely.
Enables you to customize your job tasks by identifying required forms.	Processing forms occurs in the correct sequence.

Accessing a QuickFlow

There are two ways to access the QuickFlow form.

1. Access the QuickFlow form from the **File** pull-down menu.



2. Type the code of the QuickFlow in the **Go To...** field on the Main Menu to start the QuickFlow. As you close each form within a QuickFlow, the next form is automatically opened. If you need to exit the QuickFlow before completing all forms within the QuickFlow, you may choose 'Exit QuickFlow' from the **File** Menu.

Self Check

Directions

Answer the following questions. Try to do this without using your workbook notes.

Question 1

Which of the following allows you to access various Banner products directly?

- A. Tool bar
- B. Menu bar
- C. Auto/Hint Status Line
- D. Product Links

Question 2

The Banner Main Menu allows you to

- A. customize Banner Forms.
- B. access the contents of Banner.
- C. enter information on an Banner Form.

Question 3

The only way to access a form is to use the Hierarchical Tree Menu Structure.

True or False

Question 4

Fine-Grained Access is security that allows you to see all forms on a menu.

True or False

Question 5

If you know the seven-character code of a form, you can access it using Direct Access.

True or False

Question 6

What is the purpose of a QuickFlow?

- A. Enables you to move around the menu quickly.
- B. Enables you to customize your job tasks.
- C. Enables you to remove any menu items that are not used.

Question 7

What function would you access if you know a form's seven-character code?

- A. Form Access
- B. F5 or Direct Access
- C. InstaField
- D. Direct Link

Question 8

My Banner can only include QuickFlows that are important in your daily work.

True or False

Answer Key

Question 1

Which of the following allows you to access various Banner products directly?

- A. Tool bar
- B. Menu bar
- C. Auto/Hint Status Line
- D. Product Links**

Question 2

The Banner Main Menu allows you to

- A. customize Banner Forms.
- B. access the contents of Banner.**
- C. enter information on an Banner Form.

Question 3

The only way to access a form is to use the Hierarchical Tree Menu Structure.

False. Forms can be access other ways such as using F5 or the Go To... field.

Question 4

Fine-Grained Access is security that allows you to see all forms on a menu.

False. Fine-Grained Access only allows you to see the forms that you have access to.

Question 5

If you know the seven-character code of a form, you can access it using Direct Access.

True.

Question 6

What is the purpose of a QuickFlow?

- A. Enables you to move around the menu quickly.
- B. Enables you to customize your job tasks.**
- C. Enables you to remove any menu items that are not used.

Question 7

What function would you access if you know its seven-character code?

- A. Form Access
- B. F5 or Direct Access**
- C. InstaField
- D. Direct Link

Question 8

My Banner can only include QuickFlows that are important in your daily work.

False. My Banner can include forms, jobs, menus, and QuickFlows that are important in your daily work.

Banner Forms



Section goal

The goal of this section is to delineate how Banner forms are set up, named, and the different components that make up the form.

Objectives

After completing this section, you will be able to

- search for items in a database
- explain the concept of a form
- describe the areas of the form
- explain the naming convention for forms
- define types of forms
- describe fields, blocks, and records
- search for items in the database
- explain form relationships.

What is a Form?

Introduction

A form is an online document where you can enter and look up information in your 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 blocks, windows, dialog boxes, and alert boxes.

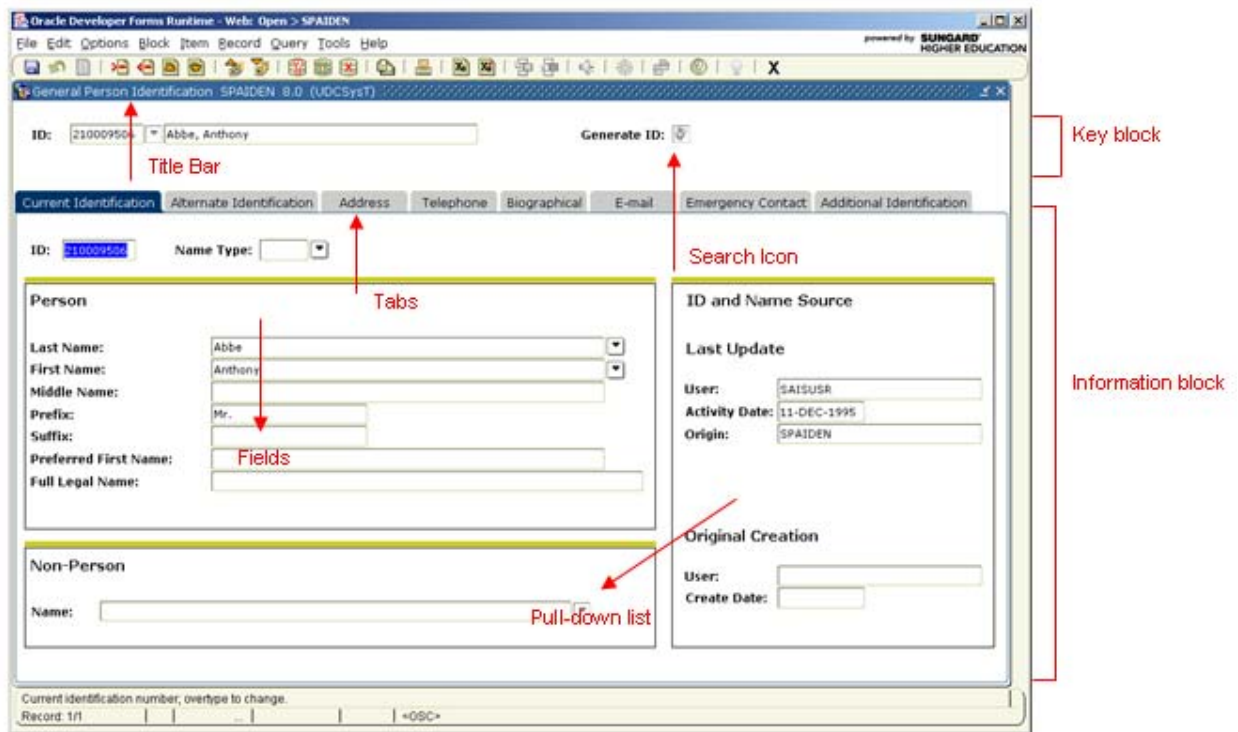
Banner form example

The screenshot shows a web browser window titled "Oracle Developer Forms Runtime - Web: Open > GTVLETR". The main content is a table titled "Letter Code Validation GTVLETR 8.0 (UDCSysT)". The table has six columns: Letter Code, Description, Allow Duplicates, Alternate Letter Code, Print Command, and Activity Date. The first row is highlighted in blue.

Letter Code	Description	Allow Duplicates	Alternate Letter Code	Print Command	Activity Date
2005_AF_SOLIC	2005 Annual Fund Solicitation	<input checked="" type="checkbox"/>			06-OCT-2005
2ND_FOLLOW_UP	Second Follow-up Letter	<input checked="" type="checkbox"/>			22-NOV-2006
ACT_LIST	Activity List	<input checked="" type="checkbox"/>			10-OCT-2005
ACT_SEARCH_TAPE	ACT Search Tape Letter w/Card	<input type="checkbox"/>			23-AUG-1999
ADMIT_DECISION	Admissions Decision Letter	<input type="checkbox"/>			25-FEB-1998
ADM_2ND_ACKN	2nd App Acknowledgement	<input checked="" type="checkbox"/>			06-DEC-2006
ADM_ACKNOWLEDG	Admissions Acknowledgment Ltr	<input checked="" type="checkbox"/>			16-OCT-2000
ADM_APPL_ACKN	Admissions Application Ackn	<input type="checkbox"/>			23-MAY-1995
ADM_CHKL	Admissions Checklist Letter	<input type="checkbox"/>			17-MAY-1995
ADM_CHKLTEST	Testing CHKL variable	<input checked="" type="checkbox"/>			22-MAY-2007
ADM_COUNSELOR	Intro to Admission Counselor	<input type="checkbox"/>			09-NOV-2007
ADM_FA_INTEREST	Financial Aid Interest Letter	<input type="checkbox"/>			23-MAY-1995
ADM_INT_1	Admissions Interview 1 Letter	<input type="checkbox"/>			23-MAY-1995
ADM_LABEL	Admissions Label	<input checked="" type="checkbox"/>			10-MAR-2006
ADM_RES_OFFER	Research Offer Letter	<input type="checkbox"/>			06-APR-2005
ADM_RES_REJECT	Research Rejection Letter	<input type="checkbox"/>			06-APR-2005
ADV_APPT	Advising Appointment	<input type="checkbox"/>			21-SEP-2005
AD_ACK_GIFTS	Gift Acknowledgement Letter	<input checked="" type="checkbox"/>			10-MAY-1995
AD_ACK_SPECIAL	Acknowledgement of Special Gif	<input type="checkbox"/>	AD_ACK_TWO		10-MAY-1995
AD_ACK_TWO	Second Special Ackn of Gifts	<input checked="" type="checkbox"/>			10-MAY-1995
AD_QUIK_RECPT	Quick On line Gift Receipt	<input checked="" type="checkbox"/>			10-MAY-1995
AFDM01	Annual 1st Direct Mail Solicit	<input checked="" type="checkbox"/>			27-FEB-2007

Letter Code.
Record: 1/?

Parts of a form



Part	Description
Title Bar	May display the form's descriptive name, the seven-character ID name, the software version number and the database name.
Search Icon	Calls up the set-up form that contains the pre-entered data for you to select a value.
Key block	Contains information that determines what is entered or displayed on the remainder of the form.
Information block	Displays data about the information entered in the Key Block. Area where you enter information prior to updating a record.
Field	Area on a form where you can enter, query, change, and display specific information.
Pull-down list	Used to select a field value from a list of pre-defined values. A down arrow in the right side of the field indicates that the field has a pull-down list.
Tabs	Tabs are used to arrange information in a meaningful way, and allow you to navigate easily between groups or blocks of information.

The screenshot displays the 'Biographical' tab of a form titled 'General Person Identification SPAIDEN B.D (UDCSYST)'. The form contains several input fields and checkboxes. The 'Gender' section has three radio buttons: 'Male' (selected), 'Female', and 'Not Available'. The 'Birth Date' is '26-MAR-1977' and 'Age' is '31'. There are checkboxes for 'Confidential', 'Deceased', and 'Special Disabled Veteran'. A 'Last Update' section shows 'User' and 'Activity Date' (19-JAN-1995). At the bottom, a table has columns for 'Race', 'User', and 'Activity Date'.

Part	Description
Radio Button	Used to select one of several options. Only one radio button can be selected at a time.
Checkbox	Used to enable or disable features or options.

Naming Conventions

The seven-character form name

Every form has an abbreviated seven-character form name. Most of the time, forms are referred to by this seven-character form name.

Position 1

Identifies the Banner product owning the form, report, process or table.

Products are Accounts Receivable, Advancement, Finance, Financial Aid, General, Human Resources, Student and Technical.

The following table contains the codes for various Banner products.

Code	Product/Purpose
A	Advancement
B	Property Tax
C	Courts
D	Cash Drawer
F	Finance
G	General
K	Work Management
L	Occupational Tax and License
N	Position Control
O	Customer Contact
P	Payroll
Q	Electronic Work Queue
R	Financial Aid
S	Student (shared)
T	Accounts Receivable
U	Utilities
V	Voice Response
X	Records Indexing
W, Y, Z	Reserved for Client Applications

Position 2

Identifies the application module owning the form, report, process or table.

Unique to the product identified in position 1.

For each Banner product, the second position would be one of the following codes.

Code	Product/Purpose
Position 2 for Banner Advancement	
A	Membership
D	Designation
E	Event Management
F	Campaign
G	Pledge and Gift/Pledge Payment
L	Label
M	Prospect Management
O	Organization
P	Constituent/Person
S	Solicitor Organization
T	Validation form/table
U	Utility
V	Reserved-Canadian Solution Center
X	Expected Matching Gift

Code	Product/Purpose
Position 2 for Banner Financial Aid	
B	Budgeting
C	Record Creation
E	Electronic Data Exchange
F	Funds Management
H	History and Transcripts
J	Student Employment
L	Logging
N	Need Analysis
O	Common Functions
P	Packaging and Disbursements
R	Requirements Tracking
S	Student System Shared Data
T	Validation form/table
U	Utility
V	Reserved-Canadian Solution Center

Code	Product/Purpose
Position 2 for Banner HR/Payroll (P) Position Control (N)	
A	Application
B	Budget
C	COBRA
D	Benefit/Deductions
E	Employee
H	Time Reporting/History
O	Overall
P	General Person
R	Electronic Approvals
S	Security
T	Validation/rule table
U	Utility
V	Reserved-Canadian Solution Center
X	Tax Administration

Code	Product/Purpose
Position 2 for Banner Finance	
A	Accounts Payable
B	Budget Development
C	Cost Accounting
E	Electronic Data Interchange
F	Fixed Assets
G	General Ledger
I	Investment Management
N	Endowment Management
O	Operations
P	Purchasing/Procurement
R	Research Accounting
S	Stores Inventory
T	Validation form/table
U	Utility
V	Reserved-Canadian Solution Center
X	Archive/Purge

Code	Product/Purpose
Position 2 for Banner General	
E	Event Management
J	Job Submission
L	Letter Generation
O	Overall
P	Purge
S	Security
T	Validation form/table
U	Utility
V	Reserved-Canadian Solution Center
X	Cross Product

Code	Product/Purpose
Position 2 for Banner Student	
A	Admissions
C	Catalog
E	Support Services
F	Registration/Fee Assessment
G	General Student
H	Grades/Academic History
I	Faculty Load
K	Reserved for SunGard Higher Education International
L	Location Management
M	CAPP
O	Overall
P	Person
R	Recruiting
S	Schedule
T	Validation form/table
U	Utility

Code	Product/Purpose
Position 2 for Banner Accounts Receivable (R)	
F	Finance Accounts Receivable
G	General Accounts Receivable
O	Overall
R	Research Accounting
S	Student Accounts Receivable
T	Validation form/table
U	Utility
V	Reserved-Canadian Solution Center
Position 2 for Banner Information Access/Kiosk (I)	
R	Financial Aid
S	Student
Position 2 for Banner Document Management Suite (BDMS) (E)	
T	Validation form/table
X	Banner Document Management Suite
Position 2 for Banner All Products	
W	Reserved for client forms or modules used within a Banner application
Y	(character in position 1 does not equal W, Y, or Z)

Position 3

Identifies the type of form, report, process or table.

Codes are the same for all Banner products.

Code	Type of Form/Process
A	Application
B	Base Table
I	Inquiry
P	Process
R	Rule Table, Repeating Table, Report or Process
V	Validation
M	Maintenance

Positions 4, 5, 6, 7

Identifies a unique four-character code for the form, report, process or table.

The following are some examples of four-character names.

Code	Purpose
***IDEN	Identification
***PINC	Position Incumbent
***STDN	Student Relation
***PERS	Person

Types of Forms

Form categories

Based on their usage, forms can be categorized as being either a set-up or day-to-day form. Set-up forms need to be completed during implementation and before day-to-day forms are used. Generally, access to set-up forms is restricted to a few users.

Form types

Different form types are associated with the form categories.

Categories	Users	Types
Setup	Administrator and/or Staff	Rule Validation Control
Day-to-Day	Staff	Inquiry Application Query Maintenance Wizard

Form definitions

The following units detail the different forms and explanations.

Rule form

Rule forms are used to define the calculations and parameters that impact processing on other forms, reports, and jobs. These forms let you tailor Banner to your institution's procedural requirements. You can enter new rules or revise existing ones if your security level permits.

Rule form example

The screenshot shows a web browser window titled "Packaging Group Fund Rules RPRGFND 8.0 (s10b80)". The form contains the following elements:

- Top Section:** "Aid Year: 0809" and "Packaging Group:" dropdown menus.
- Table Section:** A table titled "Packaging Group Fund Rules" with the following columns:
 - Fund (dropdown)
 - Short Description
 - Priority
 - Minimum Award Amount
 - Maximum Award Amount
 - Percent of Unmet Need
 - EFC Method
 - Algorithmic Rule Code (dropdown)
 - Activity Date
- Bottom Section:** "Copy To" section with "Aid Year:" and "Packaging Group:" dropdowns, and a "Copy" button with a document icon.

Rule form key points

- Used to set up user-defined rules for calculations and parameters to process data.
- Enables you to tailor Banner to your institution's needs.
- Must be defined before the institution begins using the system.
- Must be completed in a specific order.
- Must have clearance to do so.

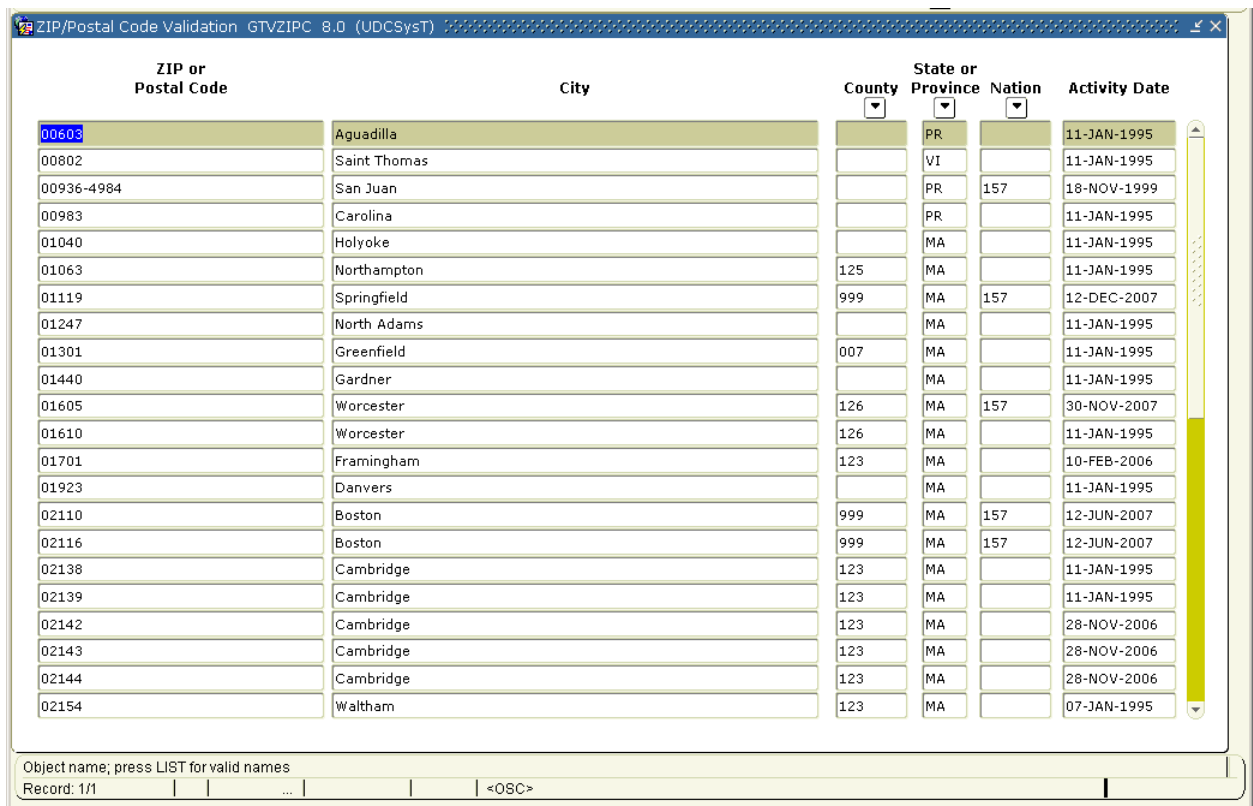
Validation form

Validation forms are used to define the values that can be entered in specific fields on application validation, or rule forms. These values make up a field's List of Values (LOV).

Banner uses LOVs to validate many fields. When the cursor is in a field that must be validated, **List of Values** appears in the status line, indicating that the entry must come from the LOV. If you try to enter a value that isn't in the LOV, an auto hint message appears, and you cannot enter that value.

Most validation forms are completed when Banner is implemented. If your security level permits, you can use a validation form to enter new values or update existing ones. Remember, you can only change values on a validation form, not through an LOV window.

Validation form example



The screenshot shows a window titled 'ZIP/Postal Code Validation - GTVZIPC 8.0 (UDCSysT)'. It contains a table with the following columns: ZIP or Postal Code, City, County, State or Province, Nation, and Activity Date. The first row is highlighted in blue, showing ZIP code 00603 for Aguadilla, PR. The table lists various ZIP codes and their corresponding cities and states, with some including county and nation information. The status bar at the bottom indicates 'Object name; press LIST for valid names' and 'Record: 1/1'.

ZIP or Postal Code	City	County	State or Province	Nation	Activity Date
00603	Aguadilla		PR		11-JAN-1995
00802	Saint Thomas		VI		11-JAN-1995
00936-4984	San Juan		PR	157	18-NOV-1999
00983	Carolina		PR		11-JAN-1995
01040	Holyoke		MA		11-JAN-1995
01063	Northampton	125	MA		11-JAN-1995
01119	Springfield	999	MA	157	12-DEC-2007
01247	North Adams		MA		11-JAN-1995
01301	Greenfield	007	MA		11-JAN-1995
01440	Gardner		MA		11-JAN-1995
01605	Worcester	126	MA	157	30-NOV-2007
01610	Worcester	126	MA		11-JAN-1995
01701	Framingham	123	MA		10-FEB-2006
01923	Danvers		MA		11-JAN-1995
02110	Boston	999	MA	157	12-JUN-2007
02116	Boston	999	MA	157	12-JUN-2007
02138	Cambridge	123	MA		11-JAN-1995
02139	Cambridge	123	MA		11-JAN-1995
02142	Cambridge	123	MA		28-NOV-2006
02143	Cambridge	123	MA		28-NOV-2006
02144	Cambridge	123	MA		28-NOV-2006
02154	Waltham	123	MA		07-JAN-1995

Validation form key points

- Used to create choices in Rule, Application, and/or Query forms.
- Values make up a field's List of Values (LOV).
- Defined when your system is installed.
- Can be added to or altered with discretion.
- May require clearance.

Inquiry form

Inquiry forms are used to look up existing information, often returning information to the calling form. You can access an inquiry form from the main menu, from another form, with Direct Access, or with Object Search.

Inquiry form example

Population Selection Inquiry GLISLCT 8.0 (s10b80)

Application: ▼

Selection

Selection ID	Description	Creator	Locked	Manual	Activity Date
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

Selection Counts

User ID	Count
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

Inquiry form key points

- Used to look up existing data.
- Can access Inquiry forms from the main menu, another form, Direct Access, or Object Search.

Application form

Application forms are used to enter, update, and query information in Banner. This is the most common type of form.

Application form example

The screenshot shows a web browser window titled "Admissions Application SAAADMS 8.1 (s10b80)". The interface includes a search bar for "ID:" and "Term:", a "View Current/Active Curricula" checkbox, and a navigation menu with tabs for "Application", "Curricula", "Fees, Mail Submission, Withdrawal Data", "Checklist", "Sources, Interests, Comments", and "Contacts, Cohorts, Attributes".

The main form area is titled "Application" and contains the following fields:

- Entry Term: [dropdown]
- Application Number: [input]
- Application Preference: [input]
- Application Date: [calendar]
- Admission Type: [dropdown]
- Student Type: [dropdown]
- Residence: [dropdown]
- Site: [dropdown]
- Full or Part Time: Full Time Part Time None
- Outstanding Requirements:
- Application Status: [dropdown]
- Application Status Date: [calendar]
- Maintained By: [input]
- Application Decision: [input]
- Application Decision Date: [calendar]
- Maintained By: [input]

Below the main form are two summary tables:

Curricula Summary						
Priority Term	Program	Catalog	Level	Campus	College	Degree
[input]	[input]	[input]				

Field of Study Summary					
Priority Term	Type	Field of Study	Department	Attached to Major	
[input]	[input]	[input]			
[input]	[input]	[input]			
[input]	[input]	[input]			

Application form key points

- Most common type of form.
- Provides data entry capabilities – enables you to build information into the system.
- Provides query capabilities – allows you to request and view existing information in the database.

Query form

Query forms are used to look up existing information, often returning information to the calling form. You can access most query forms directly from the main menu, with Direct Access, or with Object Search.

Query form example

The screenshot shows a window titled "Mail Query GUIMAIL 8.0 (s10b80)". At the top, there is an "ID:" label followed by a dropdown menu and a text input field. Below this, the form is organized into four identical rows, each representing a query entry. Each row contains the following fields:

- System:** A dropdown menu.
- Letter:** A dropdown menu.
- Initiated:** A text input field with a calendar icon.
- Printed:** A text input field with a calendar icon.
- Term:** A dropdown menu.
- Wait:** A checkbox.
- User:** A text input field.
- Module:** A checkbox.
- Originator:** A checkbox.
- Quantity:** A text input field.
- Aid Year:** A dropdown menu.
- Initials:** A dropdown menu.
- Plan:** A text input field.
- Source:** A dropdown menu.

A vertical scrollbar is visible on the right side of the form area.

Control form

Control forms are used to define the processing rules for application and validation forms at the system level. You can enter new controls or revise existing ones if your security level permits.

Control form example

The screenshot shows the 'Installation Controls' window for 'GUAINST 8.0 (UDCSysT)'. The form is divided into several sections:

- Name:** SunGard Higher Education
- Address:** SunGard Higher Education, 4 Country View Road, Malvern, PA 19355
- Nation:** 157 United States of America
- Phone:** 610 6475930
- Operating/System:** UNX
- Installation Type:** Higher Education
- Instance Name:** UDCSysT
- Activity Date:** 09-APR-2008
- ZIP/Postal Code Length:** (empty)
- Maximum Number of Open Forms:** (empty)
- Base Currency:** USD United States Dollars
- SSN/SIN/TIN Maximum Length:** 15
- Century Pivot:** 49
- Default Date Format:** MDY (selected), DMY, YMD
- System/Process Enable Indicators:**
 - Online Matching Process Enabled
 - Workflow Enabled
 - SQL Trace Enabled
 - Messaging Enabled
 - SSN/SIN/TIN Search Enabled

Installation Information

	Release	Date		Release	Date
<input checked="" type="checkbox"/> Advancement	8.0	15-FEB-2008	<input checked="" type="checkbox"/> Finance	8.0	15-FEB-2008
<input checked="" type="checkbox"/> Accounts Receivable	8.0	15-FEB-2008	<input checked="" type="checkbox"/> Human Resources	8.0	15-FEB-2008
<input checked="" type="checkbox"/> Financial Aid	8.0	15-FEB-2008	<input checked="" type="checkbox"/> Position Control	8.0	15-FEB-2008
<input type="checkbox"/> Other Financial Aid			<input checked="" type="checkbox"/> Student	8.0	15-FEB-2008
<input checked="" type="checkbox"/> General	8.0	15-FEB-2008			

Installation name: Record: 1/1 <OSC>

Control form key points

- Used to define processing rules for application and validation forms at the system level.
- Enter new controls or revise existing ones.
- Must have clearance to do so.

Maintenance form

Maintenance forms are used regularly to reflect changes/updates that will affect information in Banner.

Maintenance form example

The screenshot displays a window titled "Process Maintenance GJAJOBS 8.0 (s10b80)". Inside the window, there are four identical form entries stacked vertically. Each entry consists of the following fields:

- Process:** A text input field.
- Title:** A text input field.
- System:** A dropdown menu.
- Description:** A text input field.
- Type:** A dropdown menu.
- Printer:** A dropdown menu.
- Lines Per Page:** A text input field.
- Special Print Stock:** A text input field.
- Validation:** A text input field.
- Command:** A text input field.
- Activity Date:** A text input field.

The top entry has some fields filled with light green, while the other three entries are empty. A vertical scrollbar is visible on the right side of the window.

Wizard form

Wizard forms are used to give step-by-step instructions for completing an application.

Wizard form example

The screenshot shows a window titled "Wizard Step Setup Application GOADSTE 8.0 (UDCSysT)". The form contains the following fields:

- Add-In Code: (dropdown)
- Wizard Name: (dropdown)
- Step Name:
- Step Type Code: (dropdown)
- Activity Date:
- User ID:

Below these fields is a table with the following columns:

Property Code	Required Indicator	Value	Activity Date	User ID
<input type="text"/> (dropdown)	<input type="checkbox"/>	<input type="text"/> (dropdown)	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

At the bottom of the window, there is a status bar with the text: "Check to have form name display on window title. Record: 1/1 | ... | <OSC>".

Wizard form key points

Provide step-by-step instructions for completing a task in Banner.

Form Components

Introduction

All Banner forms are made up of three components: Records, Fields, and Blocks.

Blocks

A block is a section of a form or window that contains related information. If a form or window contains more than one block, each block (except the key block) may be enclosed in a beveled box.

Blocks:

- Group information
- Can be one or more on a screen
- May be organized on tabs within a form
- Think of as “sections” on a form

Example: A student’s record in SPAIDEN contains the following blocks: Current Identification, Person Name Information, and Non-Person Information.

Types of blocks

There are two types of blocks, a Key Block and an Information Block.

Part of Form	Description
Key block	<ul style="list-style-type: none">• Where you start on a form.• Most forms have a key block.• A unique code is entered such as an ID number, term code or document number.• Lets Banner know what piece of information you want to retrieve.• The rest of the information on the form will refer to the information that you enter on the Key block.
Information block	<ul style="list-style-type: none">• Section that contains related information to what was entered in the Key block.• A line may separate each Information block on the form.

Screen image

The screenshot shows the Oracle Developer Forms Runtime interface for the SPAIDEN application. The window title is "General Person Identification SPAIDEN 8.0 (UDCSysT)". The form is divided into several sections:

- Key block:** Contains an ID field with the value "210009506" and a Name field with the value "Abbe, Anthony". A "Generate ID" button is also present.
- Information block:** Contains two sections:
 - Last Update:** Includes fields for User (SAISUSR), Activity Date (11-DEC-1995), and Origin (SPAIDEN).
 - Original Creation:** Includes fields for User and Create Date.
- Person section:** Contains fields for Last Name (Abbe), First Name (Anthony), Middle Name, Prefix (Mr.), Suffix, Preferred First Name, and Full Legal Name.
- Non-Person section:** Contains a Name field.

The form also features a toolbar with various navigation and editing icons, and a status bar at the bottom indicating "Record: 1/1".

Navigating blocks

To navigate in between blocks or tabs, you would use the Next Block or Previous Block functions. These are icons located on the toolbar in a form. If you prefer to use keystrokes for navigation, you can use Ctrl-Page Down to reach the Next Block or Ctrl-Page Up for the Previous Block.

Next Block



Previous Block



Fields

Fields are labeled space within a block. You can enter, query, change and/or display specific information within a field.

ID:

There is usually more than one field on a form:

The screenshot shows the Oracle Developer Forms Runtime interface for SPAIDEN. The main window title is "General Person Identification SPAIDEN 8.0 (UDCSysT)". The interface includes a menu bar (File, Edit, Options, Block, Item, Record, Query, Tools, Help) and a toolbar. The form is divided into several sections:

- Current Identification:** Contains an ID field with the value "210009506" and a "Generate ID" button.
- Alternate Identification:** A tab for alternative identification numbers.
- Address:** A tab for address information.
- Telephone:** A tab for telephone numbers.
- Biographical:** A tab for biographical data.
- E-mail:** A tab for email addresses.
- Emergency Contact:** A tab for emergency contact information.
- Additional Identification:** A tab for additional identification numbers.

Red arrows and the word "Field" are used to highlight specific input areas:



- An arrow points to the "Name Type" dropdown menu.
- An arrow points to the "Last Name" field in the "Person" section.
- An arrow points to the "Name" field in the "Non-Person" section.
- An arrow points to the "Original Creation" section, specifically the "User" field.

At the bottom, a status bar displays "Current identification number; overwrite to change." and "Record: 1/1".

Field states

The following list details the different states a field can be presented on a form.

Note: You may not be able to navigate to all fields within a form. On query-only forms, you frequently cannot move through any fields at all.

State	Example	Description
Enabled	 An example of an enabled form field. It consists of a rectangular box with the label "Age:" on the left and a smaller input field on the right containing the number "65". The input field has a thin border and a small cursor icon on its right side.	Cursor is allowed in the field. Information in the field is displayed in black text.
Disabled	 An example of a disabled form field. It consists of a rectangular box with the label "ID:" on the left and two input fields on the right. The first input field contains the number "510000001" and the second is a dropdown menu showing "Allen, Matthew A.". The entire field area has a slightly greyed-out appearance.	Cursor is not allowed in the field. If information exists, it cannot be changed

Field values

Any data that is entered or displayed in a field is a value. There are two types of values as detailed in the chart below.

Note: The names of the fields that have a pre-defined value, or LOV, have a drop down arrow next to the field. Fields that you can search for a value in the database also have a drop-down arrow next to the field. The most common example is the ID field on the %Iden forms.

Citizenship:	<input type="text" value="Y"/>	<input type="button" value="▼"/>	Citizen
Ethnicity:	<input type="text" value="1"/>	<input type="button" value="▼"/>	Caucasian
Marital Status:	<input type="text" value="M"/>	<input type="button" value="▼"/>	Married

Type	Description	Example
Free-format	Free access to type in whatever information is required. Not previously defined on a validation form.	Street addresses.
List of Values (LOV)	Data on the LOV comes from previously defined values on a validation form. When you double-click on a LOV field. Use a Search icon or press the F9 key, previously defined values are displayed.	State codes – FL, PA, DE.
Search Field	If a field is a search field you must click the search icon to search.	ID, Last Name, First Name.

Navigating fields

To navigate between fields, use the next and previous keystrokes as detailed below.

Note: You may also navigate between fields using the item pull-down menu on the menu bar.

Function	Command
Next field	Tab or Enter
Previous field	Shift + Tab

Records

A record is a group of fields that make up a logical unit. There may be more than one record in a block.

Example: A person record is made up of several fields: ID, Last Name, First Name, Middle Name, Birth Date, Change Indicator, Type

Banner form

ID	Last Name	First Name	Middle Name	Birth Date	Indicator	Type
KF4000000	Abaza	Ashraf		02-APR-1972	N	
KF3000000	Abaza	Faysal		05-MAR-1969		
210009506	Abbe	Anthony		26-MAR-1977		
N00012858	Abbe	Ezekial				
908762356	Abbot	Abigale		28-SEP-1978		
UPITT0003	Abbot	Abigale		28-SEP-1978	I	
610009711	Abbot	James	Emory	17-NOV-1979		
610009711	Abbot	Jim		17-NOV-1979	N	
200607710	Abdul Baki	Nelly		08-AUG-1988	N	
200607710	Abdul Baki	Nelly		08-AUG-1988		
N88665429	Abilmona	Alisar		05-MAY-1985		
STU333444	Ables	James		04-JAN-1966		
STU444555	Abrahams	Susan		01-JAN-1966		

Record counter

The record counter displays number of records viewed and the number of total records.

Note: A question mark in the status line signifies that there are more records, but you haven't gotten to the last one, so the computer doesn't know how many there are yet.

Record: 8/?

Banner form

Person Search SOAIDEN 8.0 (UDCSysT)

ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Type
KF4000000	Abaza	Ashraf		02-APR-1972	N	
KF3000000	Abaza	Faysal		05-MAR-1969		
210009506	Abbe	Anthony		26-MAR-1977		
N00012858	Abbe	Ezekial				
908762356	Abbot	Abigale		28-SEP-1978		
UPIIT0003	Abbot	Abigale		28-SEP-1978	I	
610009711	Abbot	James	Emory	17-NOV-1979		
610009711	Abbot	Jim		17-NOV-1979	N	
200607710	Abbul Baki	Nelly		08-AUG-1988	N	
200607710	Abdul Baki	Nelly		08-AUG-1988		
N88665429	Abilmona	Alisar		05-MAY-1985		
STU333444	Ables	James		04-JAN-1966		
STU444555	Abrahams	Susan		01-JAN-1966		
N00011575	Abrams	Tanya	Marie	27-DEC-1984		
CM0000006	Abru	Kareem				
CM0000005	Abru	Karen				
CM0000004	Abru	Kenneth		27-MAY-1980		
N00011416	Abusaleh	Adeeb		05-NOV-1982		
N00011267	Abusaleh	Ruby		05-NOV-1982		
N00012346	Acadia	Bruce		17-OCT-1986		
ZZ0802	Acadia	Bruce		17-OCT-1986	I	

Case Insensitive Query
 Case Sensitive Query

Identification Number; press COUNT QUERY HITS to access additional information.
Record: 8/? ... <OSC>

Record: 8/?

Viewing records

Some forms have a scroll bar to view existing records.

Person Search SOAIDEN 8.0 (UDCSysT)

ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Type
KF4000000	Abaza	Ashraf		02-APR-1972	N	
KF3000000	Abaza	Faysal		05-MAR-1969		
210009506	Abbe	Anthony		26-MAR-1977		
N00012858	Abbe	Ezekial				
908762356	Abbot	Abigale		28-SEP-1978		
UPITT0003	Abbot	Abigale		28-SEP-1978	I	
610009711	Abbot	James	Emory	17-NOV-1979		
610009711	Abbot	Jim		17-NOV-1979	N	
200607710	Abdul Baki	Nelly		08-AUG-1988	N	
200607710	Abdul Baki	Nelly		08-AUG-1988		
N88665429	Abilmona	Alisar		05-MAY-1985		
STU333444	Ables	James		04-JAN-1966		
STU444555	Abrahams	Susan		01-JAN-1966		
N00011575	Abrams	Tanya	Marie	27-DEC-1984		
CM0000006	Abbru	Kareem				
CM0000005	Abbru	Karen				
CM0000004	Abbru	Kenneth		27-MAY-1980		
N00011416	Abusaleh	Adeeb		05-NOV-1982		
N00011267	Abusaleh	Ruby		05-NOV-1982		
N00012346	Acadia	Bruce		17-OCT-1986		
ZZ0802	Acadia	Bruce		17-OCT-1986	I	

Case Insensitive Query
 Case Sensitive Query

Identification Number; press COUNT QUERY HITS to access additional information.
 Record: 8/? ... <OSC>

Navigating records

You can navigate to different records one of three ways:

1. Use the Next Record or Previous Record functions located on the toolbar in a form.

Next Record



Previous Record



2. Use the record pull-down menu in the menu bar.
3. Use the keys on the keyboard to navigate through records.

Function	Command
Next record	Down-arrow
Previous record	Up-arrow

Wildcards

Searching for items in a database

A wildcard is a special character that represents one or more other characters. Use wildcard symbols % and _ in the search criteria.

- % (percent sign) represents any number of characters
- _ (underscore) represents one occurrence of a character

Note: ma is used as an example. The wildcard symbols can be used with any combination of letter in any order.

To get these results...	Enter these criteria...
All entries that contain ma	%ma%
All entries that begin with ma	ma%
All entries that end with ma	%ma
All entries that have m as a second character	_m%

Dialog and Alert Boxes

Pop-up boxes

Pop-up boxes are windows that appear on your screen for a specific purpose. All popup boxes require that you take action before continuing on the form.

Types of pop-up boxes

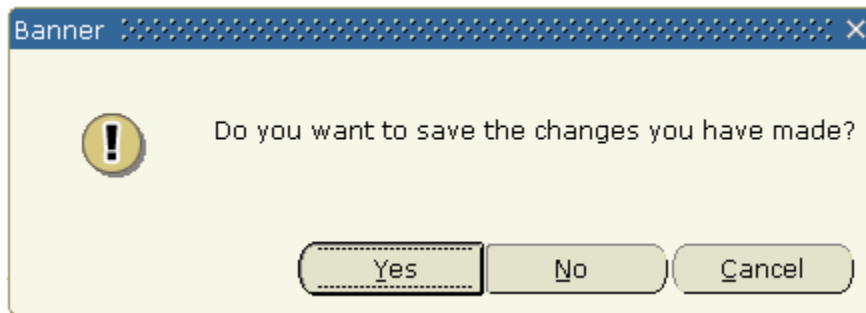
There are two types of Pop-up boxes.

- Dialog Box
- Alert Box

Dialog box

A dialog box appears when you must chose from two or more responses.

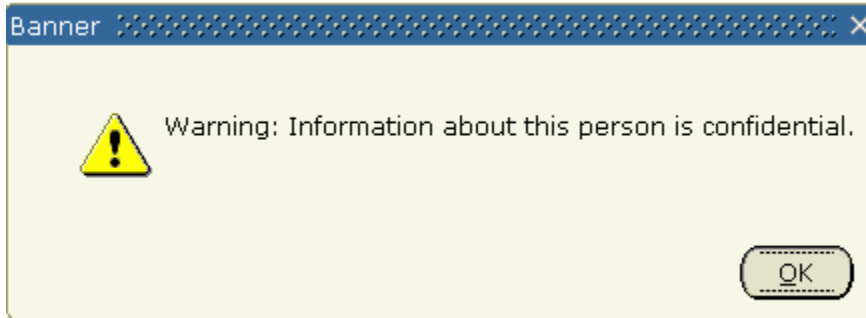
The following is an example of a dialog box.



Alert box

An alert box notifies you of a condition that may impact data.

The following is an example of an alert box.



Form Relationships

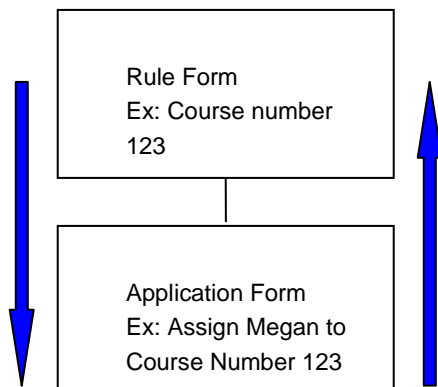
A relationship between types of forms is referred to as the parent-child relationship.

If information on a parent form has been assigned to a child form, the parent information cannot be deleted without deleting the child first.

Relationship	Forms
Parent	Rule and Validation
Child	Application and Query

Example

If a rule form has been assigned to an application form, the information on the rule form cannot be deleted without deleting the information on the application form first.



Note: A control form is considered neither a parent nor child form because it is used as more of a reference for processing than a rule. If you wanted to change a processing rule on a control form, it would affect only how the forms are processed after the control form is changed.

Self Check

Directions

Answer the following questions. Try to do this without using your workbook notes.

Question 1

Content in the Information Block determines what is entered or displayed on the rest of the form.

True or False

Question 2

A form is a document in which you enter and look up information stored in your database.

True or False

Question 3

Which of the following options allow you to enter data?

- A. Field
- B. Pull-down list
- C. Radio button
- D. Checkbox

Question 4

A validation form allows you to define processing rules.

True or False

Question 5

Few forms have a specific seven-character code.

True or False

Question 6

Position two in the seven-character code identifies the application module owning the form, report, process or table.

True or False

Question 7

If a parent form has been assigned to a child form, the child form cannot be deleted without deleting the parent first.

True or False

Question 8

Most forms have a Key block.

True or False

Question 9

Using an underscore in the search criteria represents which of the following?

- A. Any number of characters.
- B. One occurrence of a character.
- C. Two occurrences of a character.
- D. All characters.

Question 10

This box will notify you of a condition that may impact data.

- A. Direct Access
- B. Alert
- C. Element
- D. Dialog

Answer Key

Question 1

Content in the Information Block determines what is entered or displayed on the rest of the form.

False. Content in the Key Block determines what is entered or displayed on the rest of the form.

Question 2

A form is a document in which you enter and look up information stored in your database.

True.

Question 3

Which of the following options allow you to enter data?

- A. Field
- B. Pull-down list
- C. Radio button
- D. Check box

Question 4

A validation form allows you to define processing rules.

False. Control forms allow you to define processing rules.

Question 5

Few forms have a specific seven-character code.

False. All forms have a seven-character code.

Question 6

Position two in the seven-character code identifies the application module owning the form, report, process or table.

False. Position 1 identifies the application module owning the form, report, process or table.

Question 7

If a parent form has been assigned to a child form, the child form cannot be deleted without deleting the parent first.

False. The child form must be deleted first, then the parent form.

Question 8

Most forms have a Key block.

False. All forms have a Key block.

Question 9

Using an underscore in the search criteria represents which of the following?

- A. Any number of characters.
- B. One occurrence of a character.**
- C. Two occurrences of a character.
- D. All characters.

Question 10

This box will notify you of a condition that may impact data.

- A. Direct Access
- B. Alert**
- C. Element
- D. Dialog

Menu Bars



Introduction

The purpose of this section is to familiarize users with the various Menu Bars that exist within Banner.

Objectives

After completing this section, you will be able to

- describe the Banner menu bar
- utilize the functions in the Banner menu bar.

Menu Bar Overview

Introduction

The menu bar is located at the top of the main menu on all forms. It offers a variety of options for navigating within Banner. The menu bar is accessible anytime except when a dialog box, alert box, or list of values (LOV) is displayed on the screen.

Banner form

The screenshot displays the Banner SPAIDEN 8.0 (UDCSysT) form. At the top, a menu bar includes File, Edit, Options, Block, Item, Record, Query, Tools, and Help. The form header shows the ID: 200607501 and the name Caldwell, Regina. Below the header are tabs for Current Identification, Alternate Identification, Address, Telephone, Biographical, E-mail, Emergency Contact, and Additional Identification. The form is divided into sections for Person and Non-Person. The Person section includes fields for Last Name, First Name, Middle Name, Prefix, Suffix, Preferred First Name, and Full Legal Name. The Non-Person section includes a Name field. On the right side, there are sections for ID and Name Source, Last Update (User, Activity Date, Origin), and Original Creation (User, Create Date). At the bottom, a status bar provides instructions: ID number; LIST for person; COUNT HITS for non-person; DUP ITEM to generate ID; DUPLICATE RECORD for Alternate ID look-up. The record number is 1/1 and the screen is in OSC mode.

Menu bar components

The menu bar consists of several pull-down menus.

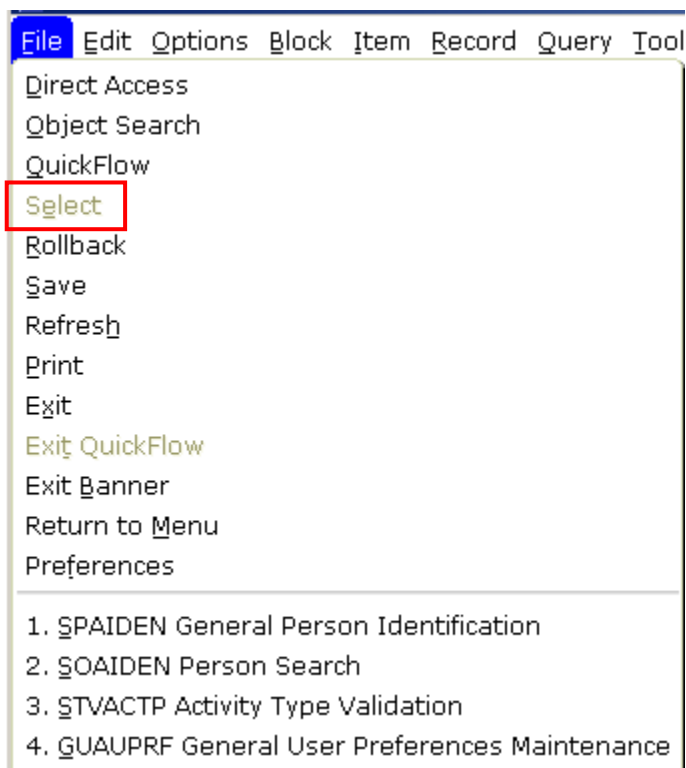
File Edit Options Block Item Record Query Tools Help

Pull Down Menus

Introduction

There are nine pull-down menus on the menu bar, each with a variety of selections. A dimmed option on a pull down menu means that is disabled.

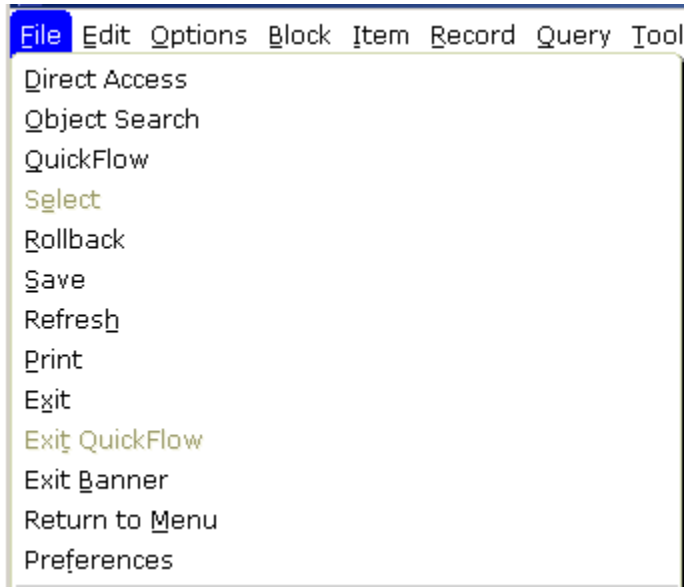
Banner menu



The File menu



The **File** menu contains standard Banner and Oracle functions.

Banner menu






Menu options

The following chart details each menu option and its purpose.


Option	Toolbar Icon	Keyboard Shortcut	Purpose
Direct Access		F5	Accesses the Direct Access Form (GUAPARM).
Object Search			Accesses the Object Search Form (GUIOBS) to locate a form, job, or QuickFlow if you know part of its name, description, or type.
QuickFlow			Displays the QuickFlow Form (GUAQFLW), which is used to access a QuickFlow.
Select			Returns you to the calling form and enters the selected value into the field that called the form.
Rollback		Shift-F7	Action depends on what type of form is currently used.

Form	Action
Application and Inquiry	Clears all information (except Key information) and returns you to the first enterable field in the Key Block.
Validation	Returns you to the first enterable field on the form.
Query	Returns you to the first enterable field on the calling form.

Save		F10	Saves all changes entered since the last time you saved.
Refresh			Clears the message line; redraws the screen.

Option	Toolbar Icon	Keyboard Shortcut	Purpose
Print			Prints the current window; inputs the date and time in the title bar.
Exit			Actions vary.

If selected from...	Then you...
a form	exit that form.
the main menu	exit from Banner.
query mode	cancel the query.

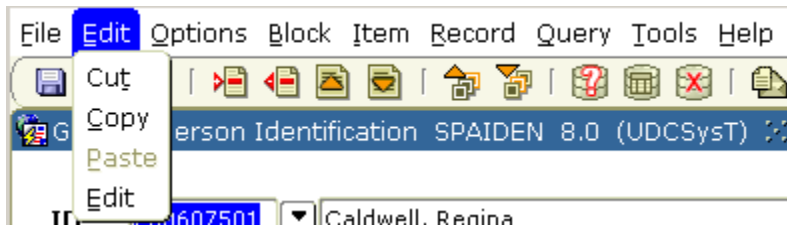
Exit QuickFlow			Exits you from QuickFlow.
Exit Banner			Closes the Banner window.
Return to Menu			Returns you to the Main Menu.
Preferences			Displays the Personal Preferences Maintenance Form (GUAUPRF), which is used to customize Banner for individual users.
Banner Document Management Suite (BDMS)			<p>Allows you to open Document Management Suite based on the context of the current form and shifts to the Document Management Suite Application.</p> <p>Note: You must be a valid Banner Document Management Suite user and have the Legato® product installed.</p>
Banner Document Management Suite (BDMS)-Info			<p>Retrieves desired information from Banner Document Management Suite (BDMS) and returns it to Banner in "silent" mode without leaving.</p> <p>Note: You must be a valid Banner Document Management Suite user and have the Legato® product installed.</p>

RRAAREQ Applicant Requirements			Displays the last 10 forms a user has accessed during the current Banner Session.
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The Edit menu

The **Edit** menu contains functions used to edit text items.

Banner menu



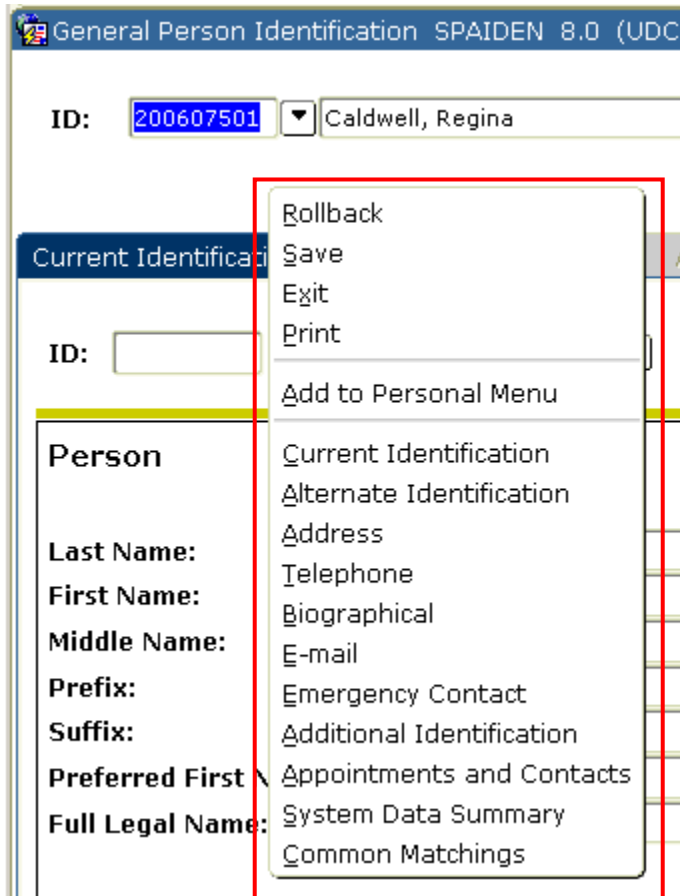
Menu options

The following table details each menu option and its purpose.

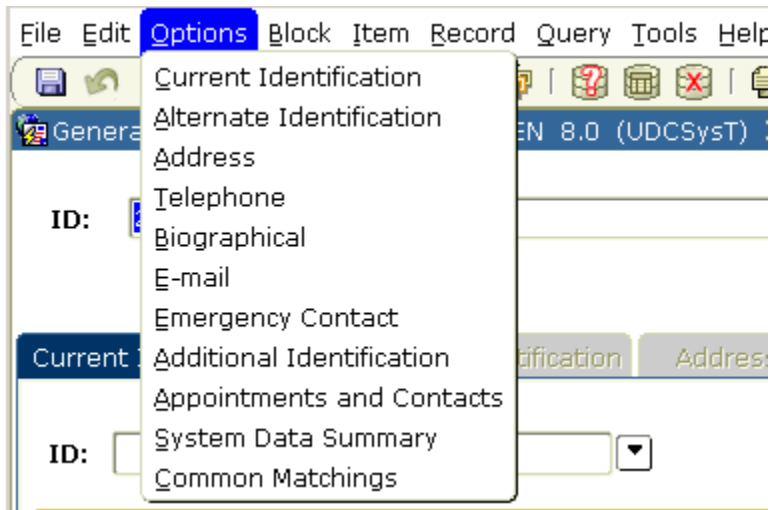
Option	Toolbar Icon	Keyboard Shortcut	Purpose
Cut		Ctrl-X	Cuts selected text and places it on the clipboard.
Copy		Ctrl-C	Copies selected text and places it on the clipboard.
Paste		Ctrl-V	Pastes text from the clipboard to the cursor location.
Edit			Displays the editor window, which is used to enter and update text.

The Options menu

The **Options** menu varies from form to form. Some take you to other blocks and windows within the current form, other options take you outside the current form. The **Options** menu as well as valid **File** menu options may also be accessed at any time by right clicking on a blank section of any form.



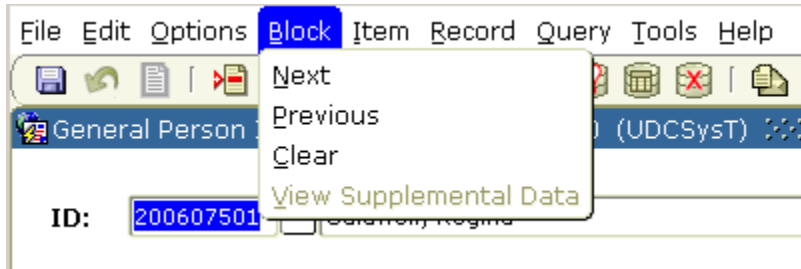
Banner menu



The Block menu




The **Block** menu enables you to move from one block area to another within a form.

Banner menu



Menu options

The following chart details each menu option and its purpose.

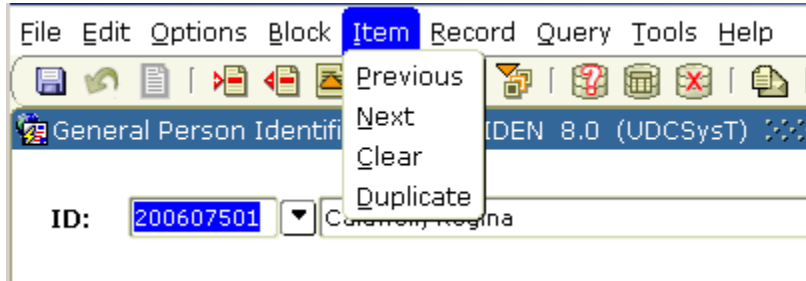
Option	Toolbar Icon	Keyboard Shortcut	Purpose
Previous		Ctrl-Page Up	Moves cursor to the previous block that has at least one enterable field.
Next		Ctrl-Page Down	Moves cursor to the next block that has at least one enterable field.
Clear		F7	Clears all information in the current block. Also known as Enter Query. Puts the form in Query Mode.
View Supplemental Data			View supplemental data for the current field, when available.

The Item menu

The **Item** menu enables you to move from one field to another and clear and duplicate data within a form.

Note: "Item" is the Banner term that is used to refer to a field.

Banner menu



Menu options

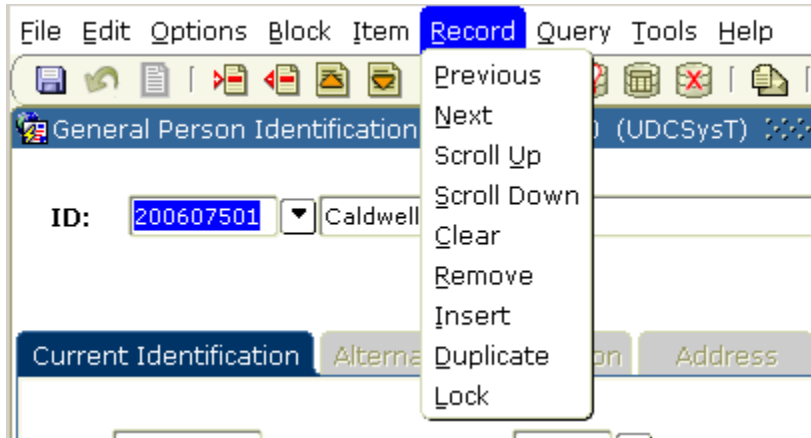
The following chart details each menu option and its purpose.

Option	Toolbar Icon	Keyboard Shortcut	Purpose
Previous		Shift-Tab	Moves the cursor to the previous enterable field.
Next		Tab	Moves the cursor to the next enterable field.
Clear			Clears all information from the current field on your display. Does not remove information from any records or tables.
Duplicate			Duplicates the contents of the same field in the previous record and copies it into the new record. Used in blank row of a repeating record.

The Record menu





The **Record** menu allows you to work with records within a form.

Banner menu



Menu options

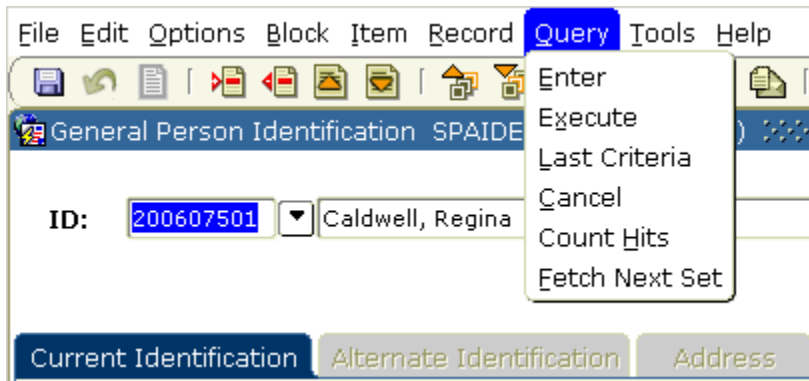
The following chart details each menu option and its purpose.

Option	Toolbar Icon	Keyboard Shortcut	Purpose
Previous		Up Arrow	Moves cursor to the first enterable field in the previous record.
Next		Down Arrow	Moves cursor to the first enterable field in the next record of the current block. If the cursor is in the last record, a new record is created.
Scroll Up		Page Up	Scrolls up the list of repeating records, putting the first displayed record at the bottom of the list.
Scroll Down		Page Down	Scrolls down the list of repeating records, putting the last displayed record at the top of the list.
Clear			Clears all information from the display of the current record.
Remove			Removes all information for the current record. When you Save, the record is permanently deleted.
Insert			Inserts a new blank record in the existing records.
Duplicate			Duplicates the content of all fields in a record and copies them into a new record.
Lock			Temporarily locks the contents of the record so no other Banner user can update it. Tip: Save, Rollback, then Exit release the lock.

The Query menu




The **Query** menu contains the functions used to search for information in the database based on specific criteria.

Banner menu



Menu options

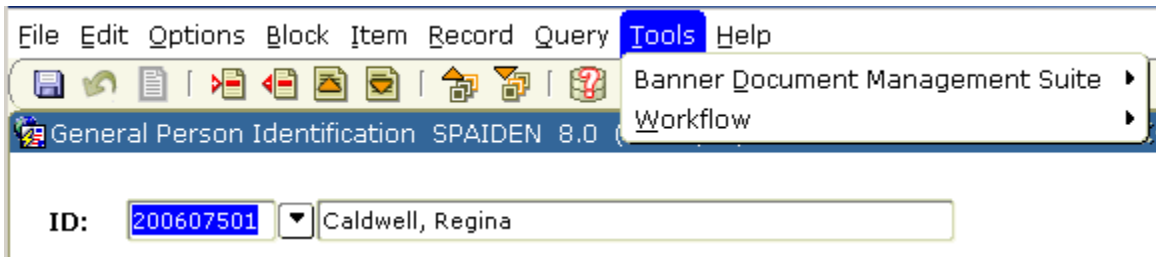
The following charts details each menu option and its purpose.

Option	Toolbar Icon	Keyboard Shortcut	Purpose
Enter		F7	Puts the form into Query mode so you can enter search criteria to see information already in the database.
Execute		F8	Searches the database and displays records that match your search criteria.
Last Criteria		F7 twice	Enters the criteria from your last search (enabled only when you are in Query mode).
Cancel		Ctrl-Q	Cancels the Query and takes the form out of Query mode.
Count Hits			Counts the number of records that match the search criteria and displays that number on the Auto Hint line.
Fetch Next Set			If more records meet the search criteria that fit in the window, clicking this option replaces the current set of displayed records with the next set.

The Tools menu

The **Tools** menu allows you access to Banner Document Management Suite (BDMS) and Workflows, if these products are installed.

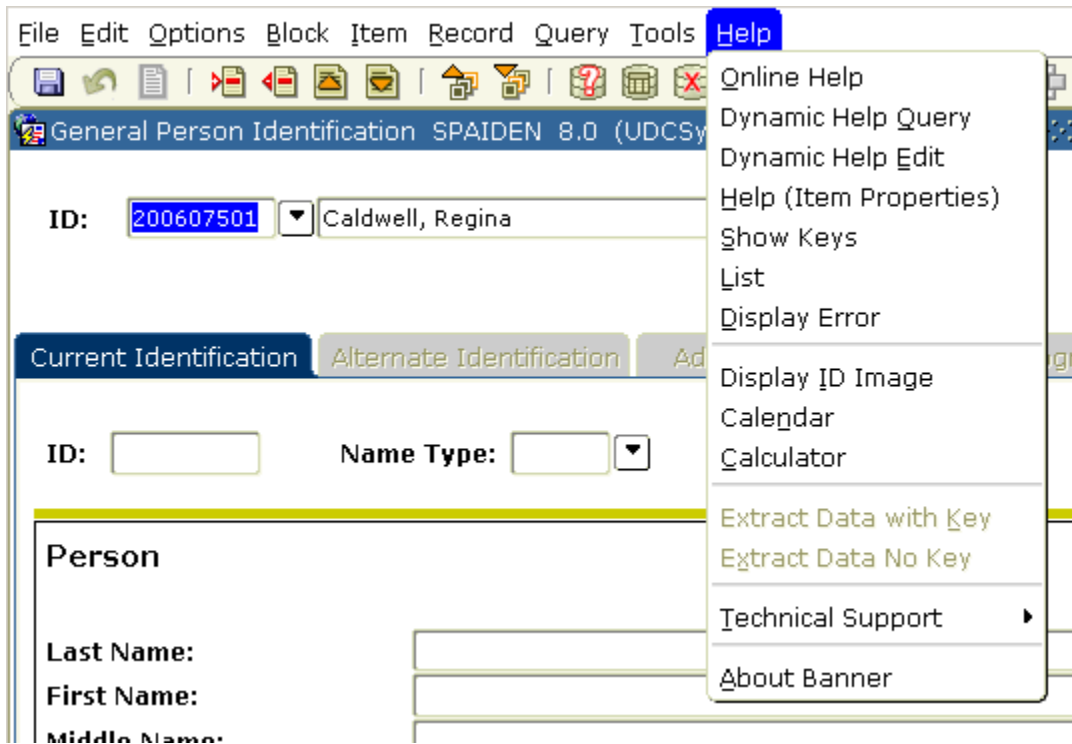
Banner menu



The Help menu


The **Help** menu contains various help tools, the image displayer, a calculator and a calendar.

Banner menu



Menu options

The following chart details each menu option and its purpose.

Option	Toolbar Icon	Keyboard Shortcut	Purpose
Online Help		Ctrl-H	Displays online information for Banner forms, windows, blocks and fields. This option may be disabled if Online Help is not available for the form.
Dynamic Help Query			Displays the Dynamic Help Form (GUAHELP) in Query mode, which is used to display traditional help for a field, block, or form.
Dynamic Help Edit			Displays the Dynamic Help Query Form (GUAHELP) in Edit mode, which is used to edit traditional help for a field, block, or form.
Help (Item Properties)			Displays the Oracle item properties window for the current field. The window lists properties such as internal database name, type of data, maximum length, etc.
Show Keys		Ctrl+F1	Displays the list of functions and their equivalent keystrokes available in your environment for the current form, window, or field.
List		F9	Displays the List of Values (LOV) for the current field if List of Values appears in the Status line.

Option	Toolbar Icon	Keyboard Shortcut	Purpose
Display Error		Shft+F1	Displays the code that is in error, if an Oracle error occurs.
Display ID Image			Displays the image associated with the ID, if available, when the cursor is in an ID field.
Calendar			Displays the calendar.
Calculator			Displays the calculator.
Extract Data Key			Extracts Banner data (for the current block), along with Key data, for use in a spreadsheet. This is available only from certain forms.
Extract No Data Key			Extracts Banner data (for the current block), without Key data, for use in a spreadsheet. This is available only from certain forms.
Technical Support			<p>Three options are accessible from this selection.</p> <p>Turn SQL trace on: If you are having problems with Banner, you will contact your IT department. They will tell you to access the Help menu and select the Turn SQL trace on option. You will walk through the steps where you are having difficulty. Banner automatically records your steps in a log file. IT can then access that file and help solve your problem.</p> <p>Turn SQL trace off: When you are finished recording your steps, you turn the SQL trace off with this option.</p> <p>Reconnect to database: Utilized when you make changes in Banner like changing your password. Instead of going through the process of logging out of Banner for the password change to take effect and logging back in, you can simply select this option to make your re-connect process go quicker.</p>
About Banner			Displays the About Banner Form (GUAABOT), which identifies the current form, release number, date and time.

Self Check

Directions

Answer the following questions. Try to do this without using your workbook notes.

Question 1

Toolbars contain menus that list the various options you can perform in Banner.

True or False

Question 2

Dimmed items in the menu bar mean that they are not accessible in that part of Banner.

True or False

Question 3

Text items such as descriptions can be edited when using the options found in the Edit menu.

True or False

Question 4

If you want to clear a record, which menu bar choice would you select?

- A. File
- B. Edit
- C. Record
- D. Help

Question 5

While viewing an LOV, access the menu bar to escape.

True or False

Answer Key

Question 1

Toolbars contain menus that list the various options you can perform in Banner.

False. The menu bar contains the lists with options.

Question 2

Dimmed items in the menu bar mean that they are not accessible in that part of Banner.

True.

Question 3

Text items such as descriptions can be edited when using the options found in the Edit menu.

True.

Question 4

If you want to clear a record, which menu bar choice would you select?

- A. File
- B. Edit
- C. Record**
- D. Help

Question 5

While viewing an LOV, access the menu bar to escape.

False. You cannot access the menu bar while viewing an LOV or when a dialog box is displayed.

Toolbar



Introduction

The purpose of this section is to familiarize users with the Banner toolbar.

Objectives

After completing this section, you will be able to

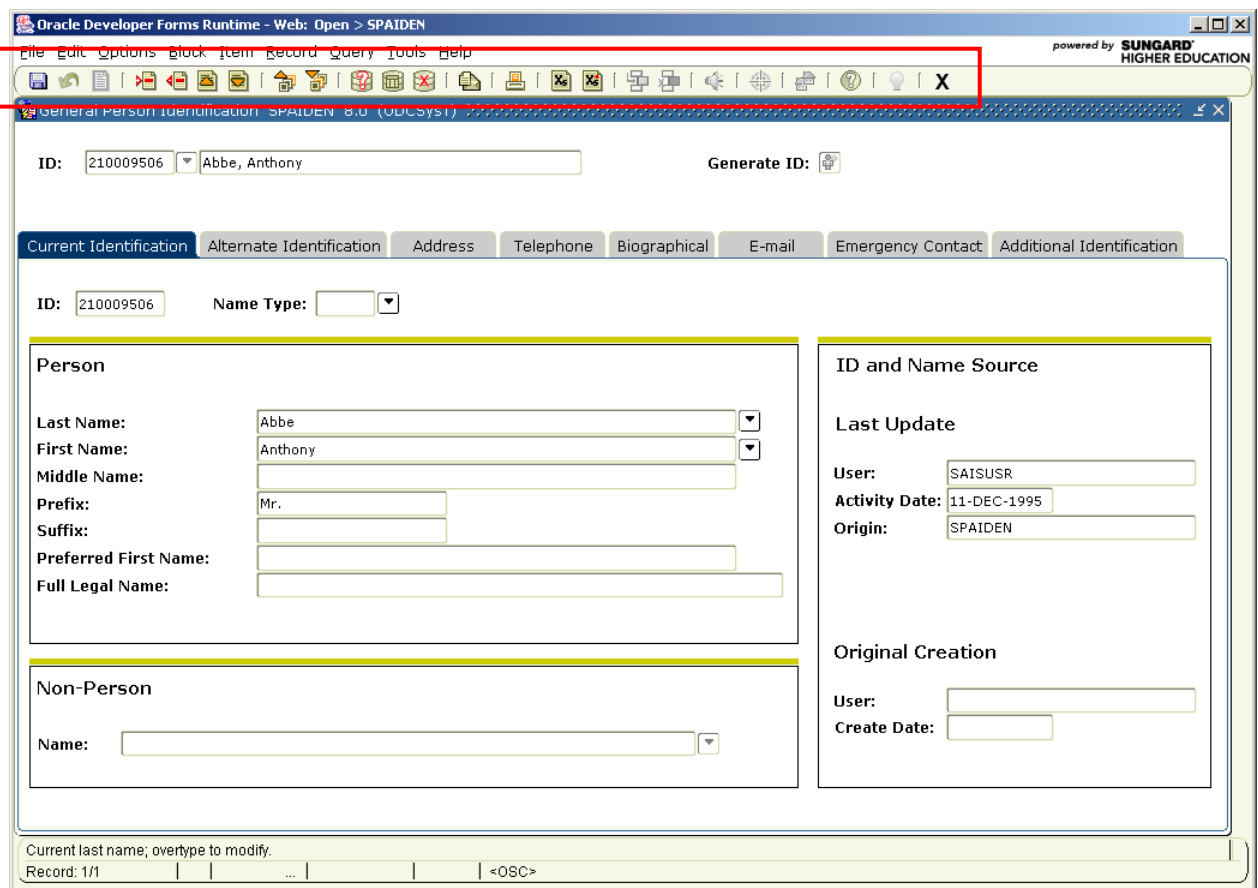
- describe the Banner toolbar
- utilize the icons in the toolbar.

Toolbar Overview

Introduction

A toolbar is a set of icons that represent shortcuts for performing common functions. Toolbars may be customized to appear based on your preferences. To make changes to the toolbar, select File and Preferences. Display Options, Alert Options, Data Extract and User Interface Color Settings may be altered using this screen.

Screen image



Bubble Help

If you move your cursor over an icon, a box appears that describes the function of the icon; this is Bubble Help. It may be turned off at any time.

Example: If you place your cursor over the exit icon, you will see the following:



Note: To turn the description box for the icons on, access the General User Preferences Maintenance Form (GUAUPRF). Under Toolbar Display Options, make sure that the Display Bubble Help option is checked.

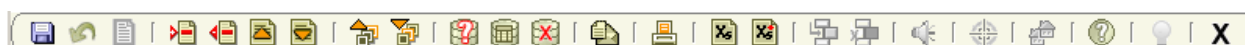
Default Icons

Toolbar customization










The set-up of icons in your toolbar can vary.

Individual users may customize toolbars.

Your institution can make toolbar changes that apply to all users.



Commonly used icons

Icon	Function
	Save
	Rollback
	Select
	Insert Record
	Previous Record
	Next Record
	Previous Block
	Next Block
	Print
X	Exit

Self Check

Directions

Answer the following questions. Try to do this without using your workbook notes.

Question 1

The toolbar is a set of icons that represent shortcuts for performing common functions.

True or False

Question 2

Your institution can make toolbar changes that apply to all users.

True or False

Question 3

What does the  icon do?

- A. It saves the data that you entered into Banner.
- B. It bookmarks your location so you can return to the same form at a later time.
- C. It bookmarks a Web page.
- D. It saves the current form into your personal files.

Answer Key

Question 1

The toolbar is a set of icons that represent shortcuts for performing common functions.

True.

Question 2

Your institution can make toolbar changes that apply to all users.

True.

Question 3

What does the  icon do?

- A. It saves the data that you entered into Banner.**
- B. It bookmarks your location so you can return to the same form at a later time.
- C. It bookmarks a Web page.
- D. It saves the current form into your personal files.

Help Features



Introduction

The purpose of this section is to familiarize the users with the different help features available in Banner.

Objectives

After completing this section, you will be able to describe and access the following types of Help in Banner.

- Online Help
- Dynamic Help
- Banner Bookshelf
- Show Keys
- Help (Item Properties)


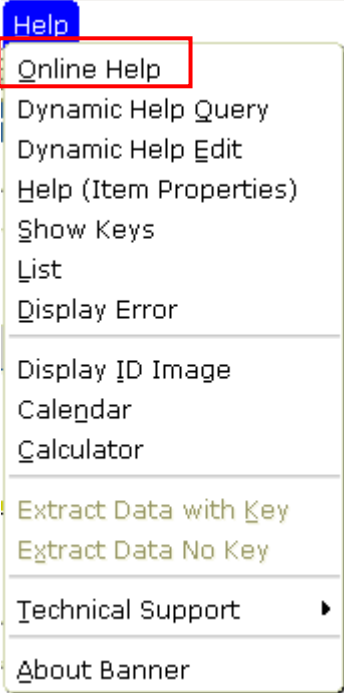
Online Help

Introduction

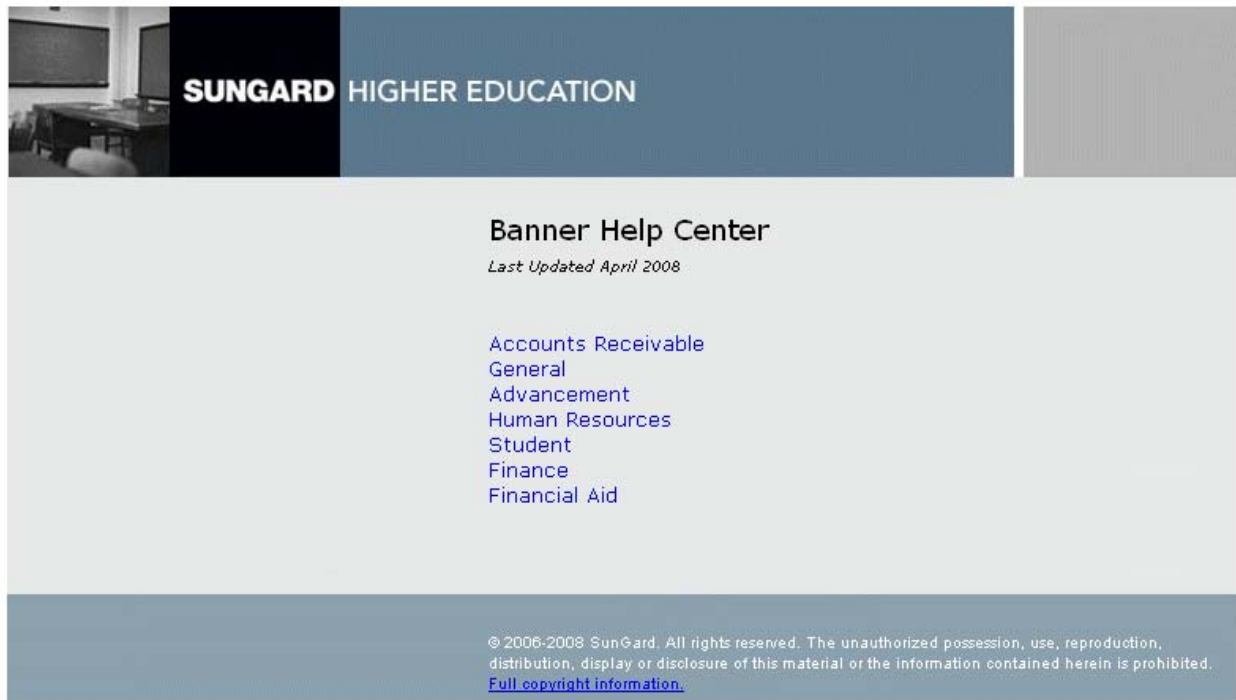
The Online Help system contains information about forms and fields, as well as tasks you can perform with Banner. This help system runs in a web browser.

Accessing Online Help

There are three ways to access Online Help, by choosing the **Online Help** button on the toolbar or the Online Help option from the **Help** pull-down menu. Additionally, you can access online help by selecting the **Help Center** link on the main menu.

Area in Banner	Graphic
Toolbar	
Menubar	 <p>The image shows a pull-down menu with the following items: Help (highlighted in blue), Online Help (highlighted in red), Dynamic Help Query, Dynamic Help Edit, Help (Item Properties), Show Keys, List, Display Error, Display ID Image, Calendar, Calculator, Extract Data with Key, Extract Data No Key, Technical Support (with a right-pointing arrow), and About Banner.</p>
Help Center	Menu Site Map Help Center (highlighted in red)

Help Center main screen



Browsing for topics

The Contents tab and the bread crumb trail both enable you to browse for topics categorically. Form and field information is organized by Banner module. Task information is contained under the *Procedures* heading.

Screen image

Contents Index Search

Send us your documentation comments ...

Release 8.1

General Forms : Application Definition Rules Form (GLRAPPL)

Application Definition Rules Form (GLRAPPL)

Use this form to define and maintain an application. An application is a functional area with similar characteristics that can be applied to population selections, populations, and variables.

You must provide a freeform **Description** and a **System** indicator. The **System** indicator identifies the Banner system associated with the application. This indicator updates information displayed on the Mail Query Form (GUIMAIL) when letters are printed.

An application can optionally include general, high-level rules used to select IDs. Any rules in an application are automatically included in all population selections controlled by the application. Population selections within an application have additional, more detailed rules that select specific populations. For example, an application can select undergraduate students. Within the application, various population selections might select seniors, resident students, and international students.

Note: If you change application rules, you must run the Parameter Selection Compile Process (GLBPARM) and the Automatic Letter Compilation Process (GLOLETT) to compile the changed application rules into each population selection controlled by the application.

The application selection rules reference fields within the Banner database. The rules are defined by entering values into the following fields:

- **Data Element.** Enter the name of the database column used in the selection rule. The name must be a valid database column in the Oracle data dictionary. Select the **Search** button to access the Object Inquiry Form (GLIOBJT) to search for an object. The column name, operator, and value automatically appear when you select an object.
- **Operator.** Enter an SQL operator (such as =, <>, >, or <). The operator is used to compare the **Data Element** and **Value** fields.

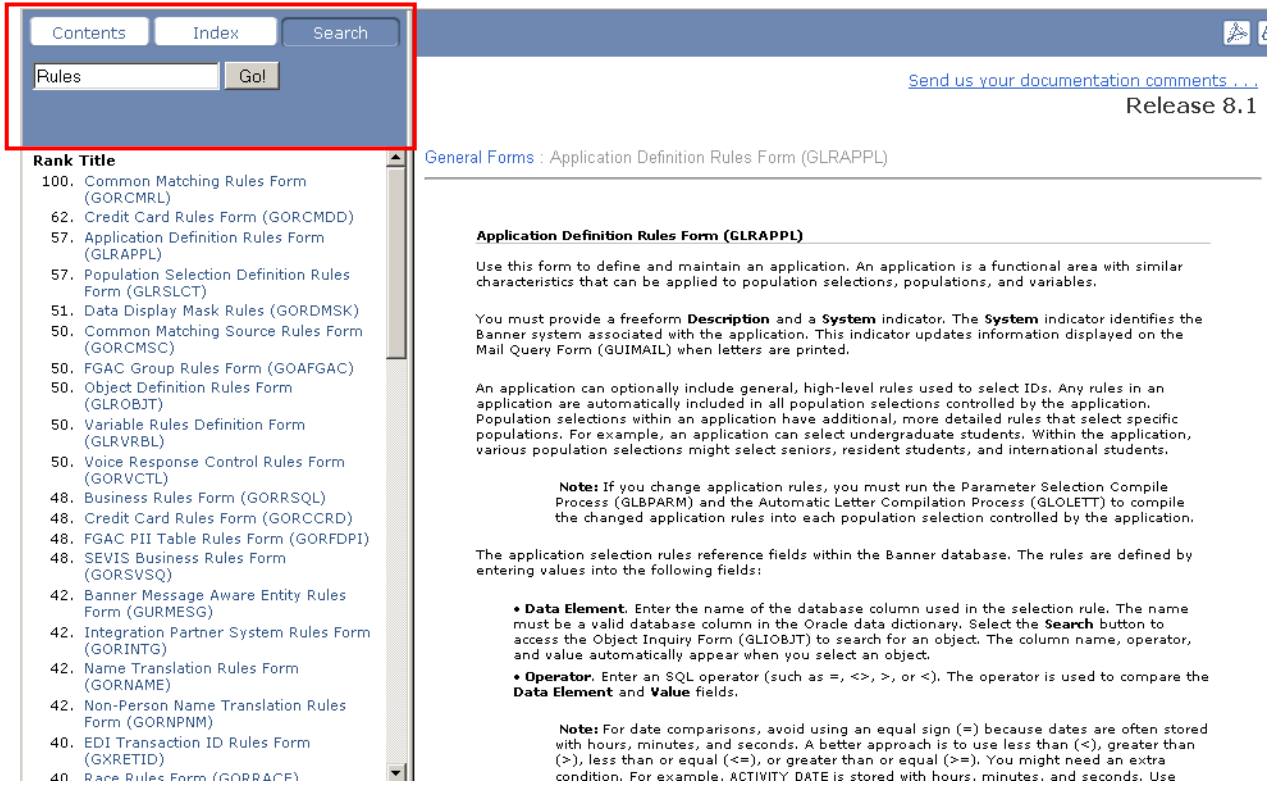
Note: For date comparisons, avoid using an equal sign (=) because dates are often stored with hours, minutes, and seconds. A better approach is to use less than (<), greater than (>), less than or equal (<=), or greater than or equal (>=). You might need an extra condition. For example, ACTIVITY_DATE is stored with hours, minutes, and seconds. Use

Browse by clicking on the **Contents** tab and by using the breadcrumb trail.

Searching for topics

The Search tab allows you to search for topics within the help system. You can also use your browser's "search on page" feature to find specific text on a help page.

Screen image



Contents Index Search

Rules Go!

[Send us your documentation comments ...](#)

Release 8.1

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- **Data Element.** Enter the name of the database column used in the selection rule. The name must be a valid database column in the Oracle data dictionary. Select the **Search** button to access the Object Inquiry Form (GLIOBJT) to search for an object. The column name, operator, and value automatically appear when you select an object.
- **Operator.** Enter an SQL operator (such as =, <>, >, or <). The operator is used to compare the **Data Element** and **Value** fields.

Note: For date comparisons, avoid using an equal sign (=) because dates are often stored with hours, minutes, and seconds. A better approach is to use less than (<), greater than (>), less than or equal (<=), or greater than or equal (>=). You might need an extra condition. For example, ACTIVITY DATE is stored with hours, minutes, and seconds. Use

Rank	Title
100.	Common Matching Rules Form (GORCMRL)
62.	Credit Card Rules Form (GORCMDD)
57.	Application Definition Rules Form (GLRAPPL)
57.	Population Selection Definition Rules Form (GLRSLCT)
51.	Data Display Mask Rules (GORDMSK)
50.	Common Matching Source Rules Form (GORCMSC)
50.	FGAC Group Rules Form (GOAFGAC)
50.	Object Definition Rules Form (GLROBJT)
50.	Variable Rules Definition Form (GLRVRBL)
50.	Voice Response Control Rules Form (GORVCTL)
48.	Business Rules Form (GORRSQL)
48.	Credit Card Rules Form (GORCCRD)
48.	FGAC PII Table Rules Form (GORFDPI)
48.	SEVIS Business Rules Form (GORSVSQ)
42.	Banner Message Aware Entity Rules Form (GURMESSG)
42.	Integration Partner System Rules Form (GORINTG)
42.	Name Translation Rules Form (GORNAME)
42.	Non-Person Name Translation Rules Form (GORNPNM)
40.	EDI Transaction ID Rules Form (GXRETID)
40.	Race Rules Form (GORRACE)

Using the index

The Index tab provides an alphabetical listing of topics within the help system. When you enter the letters of a term, the index will scroll through the topics to the closest alphabetical match.

Screen image

The screenshot shows a help system interface with a navigation bar at the top containing 'Contents', 'Index', and 'Search' tabs. Below the navigation bar is an alphabetical index grid (A-Z) and a list of forms. The 'Index' tab is active, and the list is scrolled to 'G'. The selected item is 'Application Definition Rules Form (GLRAPPL)'. The right pane displays the details for this form, including a description, a note about system indicators, and instructions on how to use the form's selection rules.

Contents Index Search

A B C D E F G H I J L M N O P Q R
S T U V Z

Send us your documentation comments ...
Release 8.1

General Forms : Application Definition Rules Form (GLRAPPL)

Application Definition Rules Form (GLRAPPL)

Use this form to define and maintain an application. An application is a functional area with similar characteristics that can be applied to population selections, populations, and variables.

You must provide a freeform **Description** and a **System** indicator. The **System** indicator identifies the Banner system associated with the application. This indicator updates information displayed on the Mail Query Form (GUIMAIL) when letters are printed.

An application can optionally include general, high-level rules used to select IDs. Any rules in an application are automatically included in all population selections controlled by the application. Population selections within an application have additional, more detailed rules that select specific populations. For example, an application can select undergraduate students. Within the application, various population selections might select seniors, resident students, and international students.

Note: If you change application rules, you must run the Parameter Selection Compile Process (GLBPARM) and the Automatic Letter Compilation Process (GLOLETT) to compile the changed application rules into each population selection controlled by the application.

The application selection rules reference fields within the Banner database. The rules are defined by entering values into the following fields:

- **Data Element.** Enter the name of the database column used in the selection rule. The name must be a valid database column in the Oracle data dictionary. Select the **Search** button to access the Object Inquiry Form (GLIOBJT) to search for an object. The column name, operator, and value automatically appear when you select an object.
- **Operator.** Enter an SQL operator (such as =, <>, >, or <). The operator is used to compare the **Data Element** and **Value** fields.

Note: For date comparisons, avoid using an equal sign (=) because dates are often stored with hours, minutes, and seconds. A better approach is to use less than (<), greater than (>), less than or equal (<=), or greater than or equal (>=). You might need an extra condition. For example, ACTIVITY_DATE is stored with hours, minutes, and seconds. Use

Dynamic Help

Introduction

Dynamic Help is the traditional help for forms, blocks and fields. Institution specific help will be contained in the Local Dynamic Help.

Accessing Dynamic Help

Dynamic Help is displayed on the Help Form (GUAHELP). It allows you to identify the help text you want to access.

Note: You can access GUAHELP in Query mode or in Edit mode.

Screen image

The screenshot shows a window titled "Help Form GUAHELP 8.0 (UDCSysT)". Inside the window, there are four radio button options: "Form", "Block", "Field", and "Banner". The "Field" option is selected. To the right of these options are three text input fields. The first field contains "SPAIDEN". The second field contains "SPRIDEN_CURRENT" and has a dropdown arrow on its right. The third field contains "PERS_LAST_NAME" and also has a dropdown arrow on its right. Below these fields, there are two checkboxes: "Local" (which is checked) and "Help Exists?". At the bottom of the window, there are three buttons: "Display", "Clear", and "Cancel".

Dynamic Help types

The following chart details the different types of dynamic help.

Type	Description
Banner Dynamic Help	Provided by SunGard Higher Education. Updated with each system. Can change help text, but each upgrade overwrites your changes.
Local Dynamic help	Written and maintained by your institution. Not affected by system upgrades

Banner Bookshelf

Introduction

Banner Bookshelf is a tool for reading, searching and printing Banner documentation. It accesses the following system documentation in PDF format:

- User Manuals
- Release Guides
- Upgrade Guides
- Implementation Guides
- Technical Reference Manual (TFM)
- Object: Access Reporting Data Models

Note: PDF means portable document format. These files can be printed but not altered.

Accessing Banner Bookshelf

Banner Bookshelf must be downloaded from the Customer Support Center by your site administrator and installed locally.

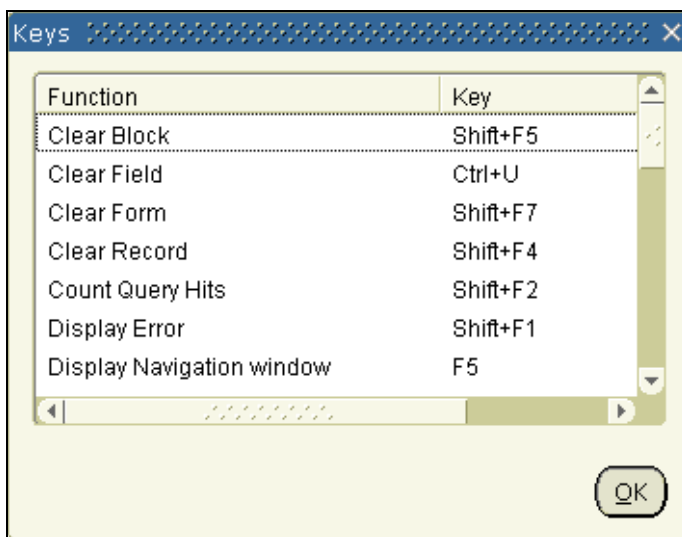
It can be accessed from a user's desktop by creating a shortcut. Further instructions can be found in the *Banner General Release Guide* and the *Banner Documentation Bookshelf Getting Started Guide*.

Show Keys

Introduction

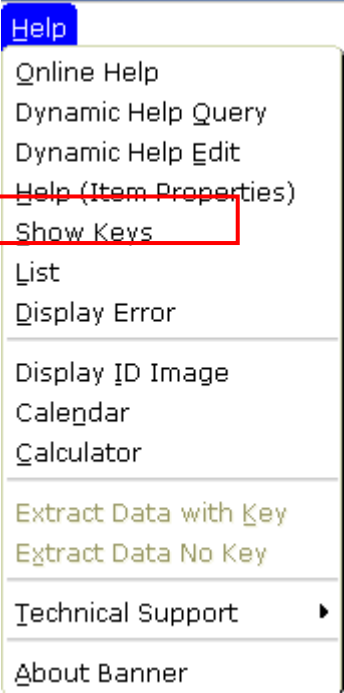
Show Keys provides a list of functions and associated keystrokes for the current field or form.

Screen image



Accessing Show Keys

Access Show Keys from one of the following areas.

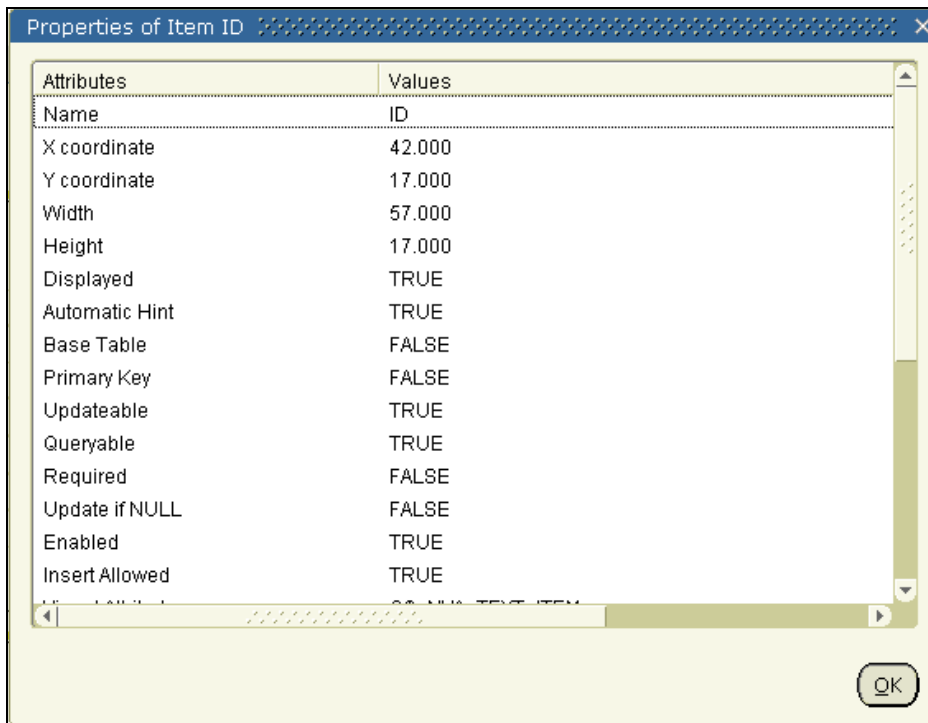
Area in Banner	Graphic / Keystroke
Keyboard	Ctrl+F1
Menubar	 A screenshot of a software application's Help menu. The menu is open, showing several options. The 'Show Keys' option is highlighted with a red rectangular box. The menu items are: Help (highlighted in blue), Online Help, Dynamic Help Query, Dynamic Help Edit, Help (Item Properties), Show Keys (highlighted in red), List, Display Error, Display ID Image, Calendar, Calculator, Extract Data with Key, Extract Data No Key, Technical Support (with a right-pointing arrow), and About Banner.

Help (Item Properties)

Introduction

Help (Item Properties) provides a list of all properties in the current field.

Banner form

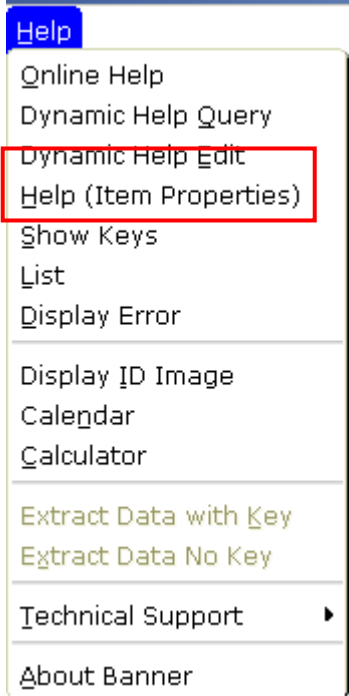


The screenshot shows a dialog box titled "Properties of Item ID". It contains a table with two columns: "Attributes" and "Values". The table lists various properties of the item, such as coordinates, dimensions, and display options. An "OK" button is located at the bottom right of the dialog.

Attributes	Values
Name	ID
X coordinate	42.000
Y coordinate	17.000
Width	57.000
Height	17.000
Displayed	TRUE
Automatic Hint	TRUE
Base Table	FALSE
Primary Key	FALSE
Updateable	TRUE
Queryable	TRUE
Required	FALSE
Update if NULL	FALSE
Enabled	TRUE
Insert Allowed	TRUE

Accessing Item Properties

Access Help (Item Properties) from the following area.

Area in Banner	Graphic
Menubar	 <p>The graphic shows a dropdown menu titled 'Help' with the following items: Online Help, Dynamic Help Query, Dynamic Help Edit, Help (Item Properties) (highlighted with a red box), Show Keys, List, Display Error, Display ID Image, Calendar, Calculator, Extract Data with Key, Extract Data No Key, Technical Support (with a right-pointing arrow), and About Banner.</p>

Auto Hint/Status Line

Introduction

The Auto Hint/Status Line appears at the bottom of the screen. It describes the place where the cursor is located. Error messages, processing messages, and keyboard equivalents appear here.

Screen image

The screenshot displays the SPAIDEN 8.0 (UDCSysT) application window. The title bar includes the text "General Person Identification SPAIDEN 8.0 (UDCSysT)" and "powered by SUNGARD HIGHER EDUCATION". The menu bar contains "File Edit Options Block Item Record Query Tools Help". The toolbar includes various icons for file operations and navigation. The main window features a search bar with "ID: 210009506" and "Abbe, Anthony", and a "Generate ID:" button. Below this is a tabbed interface with "Current Identification" selected. The "Current Identification" tab shows "ID: 210009506" and "Name Type:" with a dropdown arrow. The "Person" section contains fields for "Last Name:" (Abbe), "First Name:" (Anthony), "Middle Name:", "Prefix:" (Mr.), "Suffix:", "Preferred First Name:", and "Full Legal Name:". The "Non-Person" section has a "Name:" field. To the right, the "ID and Name Source" section includes "Last Update" with fields for "User:" (SAISUSR), "Activity Date:" (11-DEC-1995), and "Origin:" (SPAIDEN). Below that is the "Original Creation" section with "User:" and "Create Date:" fields. At the bottom, a red-bordered box highlights the "Auto Hint/Status Line" containing the text "Current last name; otype to modify." and "Record: 1/1 | ... | <OSC>".

Self Check

Directions

Answer the following questions. Try to do this without using your workbook notes.

Question 1

Online Help is available for all forms.

True or False

Question 2

Selecting Online Help Query will display the Dynamic Help Form (GUAHELP) in Query mode, which is used to display help for a field, block or form.

True or False

Question 3

Which of these documents can NOT be accessed directly from your computer using Banner Bookshelf?

- A. User Manuals
- B. Training Materials
- C. Release Guides
- D. Implementation Guides

Question 4

Under the Help pull-down menu, which menu bar item would you select to view a list of actions that can be accessed through keystrokes?

- A. Show Keys
- B. Help (Item Properties)
- C. Banner Bookshelf
- D. Dynamic Help

Question 5

To view a list of all of the properties in the current field that you are in, you would view which type of help?

- A. Show Keys
- B. Help (Item Properties)
- C. Banner Bookshelf
- D. Dynamic Help

Question 6

If you wanted to view the error or processing messages at the bottom of a form, you would look at the Auto Hint/Status Line.

True or False

Answer Key

Question 1

Online Help is available for all forms.

True. With the exception of a few security forms, Online Help is available for all forms.

Question 2

Selecting Online Help Query will display the Dynamic Help Form (GUAHELP) in Query mode, which is used to display help for a field, block or form.

False. Selecting Dynamic Help Query will display GUAHELP.

Question 3

Which of these documents can NOT be accessed directly from your computer using Banner Bookshelf?

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Question 6

If you wanted to view the error or processing messages at the bottom of a form, you would look at the Auto Hint/Status Line.

True.