Banner
Navigation Training

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Webpage - www.controller.vt.edu

Banner Navigation Training

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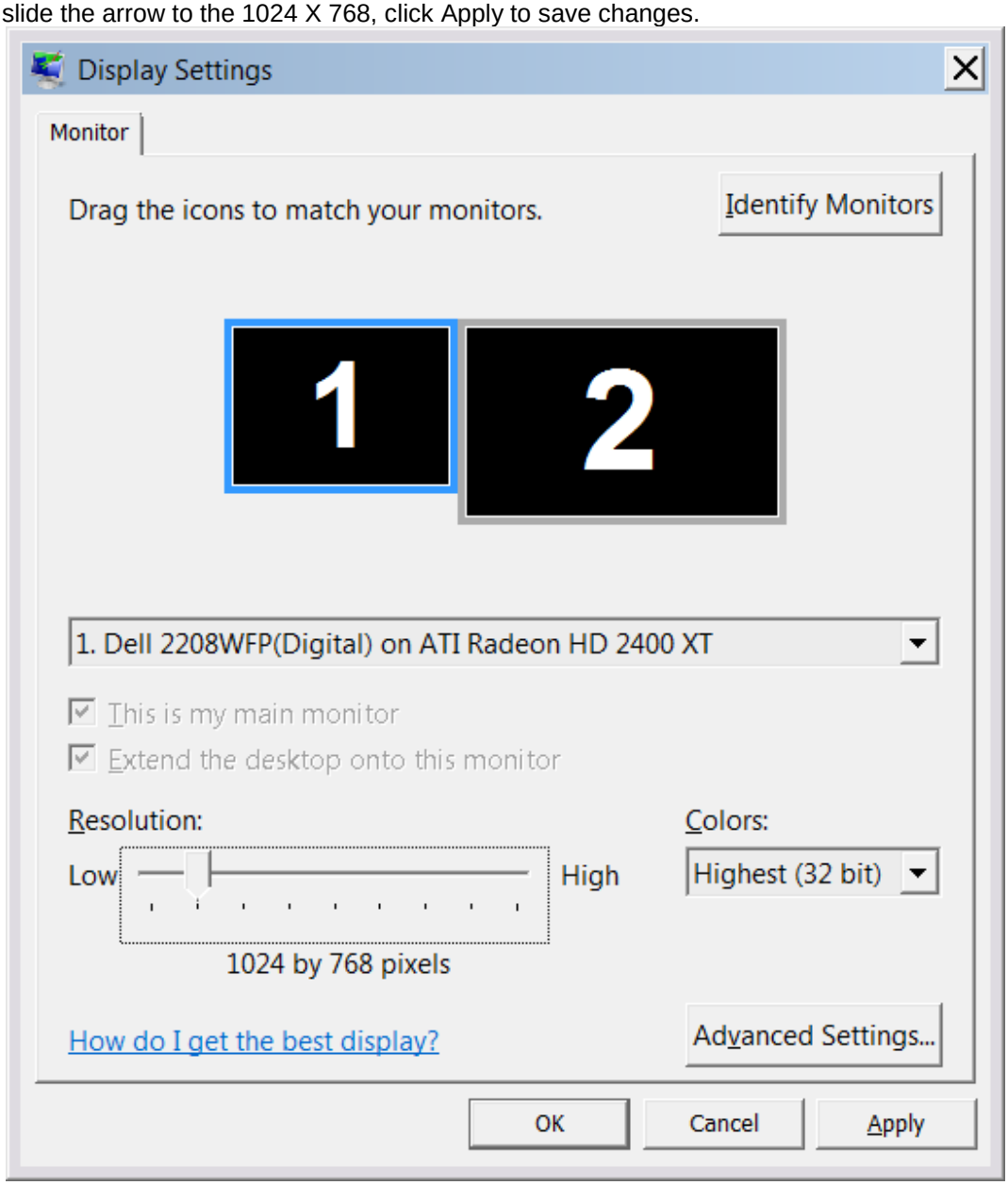
Objective

The objective of this training is to give the new Banner user an introduction to the Banner Finance system at Virginia Tech. Training topics include definitions, terminology and basic navigation techniques.

Display Resolution

SunGard SCT and Virginia Tech recommend users **set their display to 1024 X 768**. This will allow for maximum display of the forms.

The instructions for changing your screen resolution vary depending on your operating system. The most common way to ensure you are utilizing the full image or to adjust the display settings is to right click on the main desktop screen, select Personalize, then click Display Settings. Under the Resolution section, slide the arrow to the 1024 X 768, click Apply to save changes.

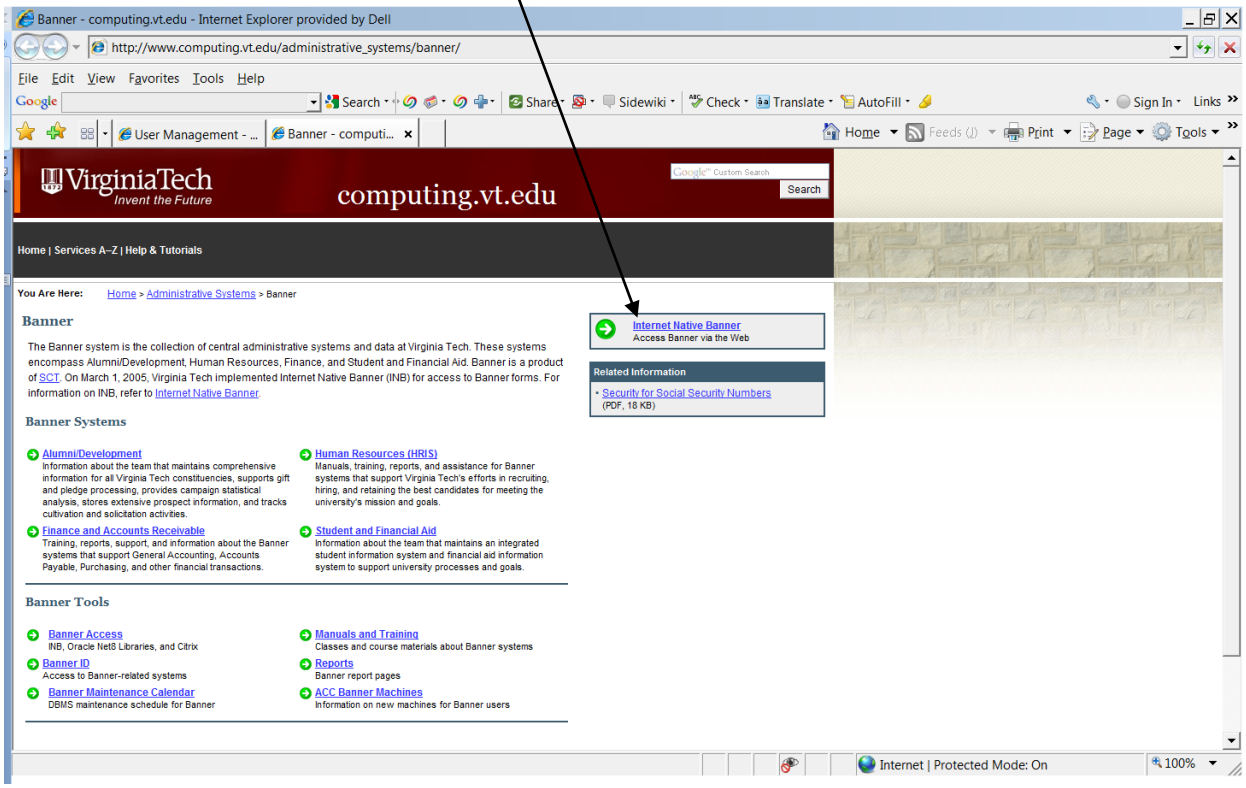


Logging into Banner

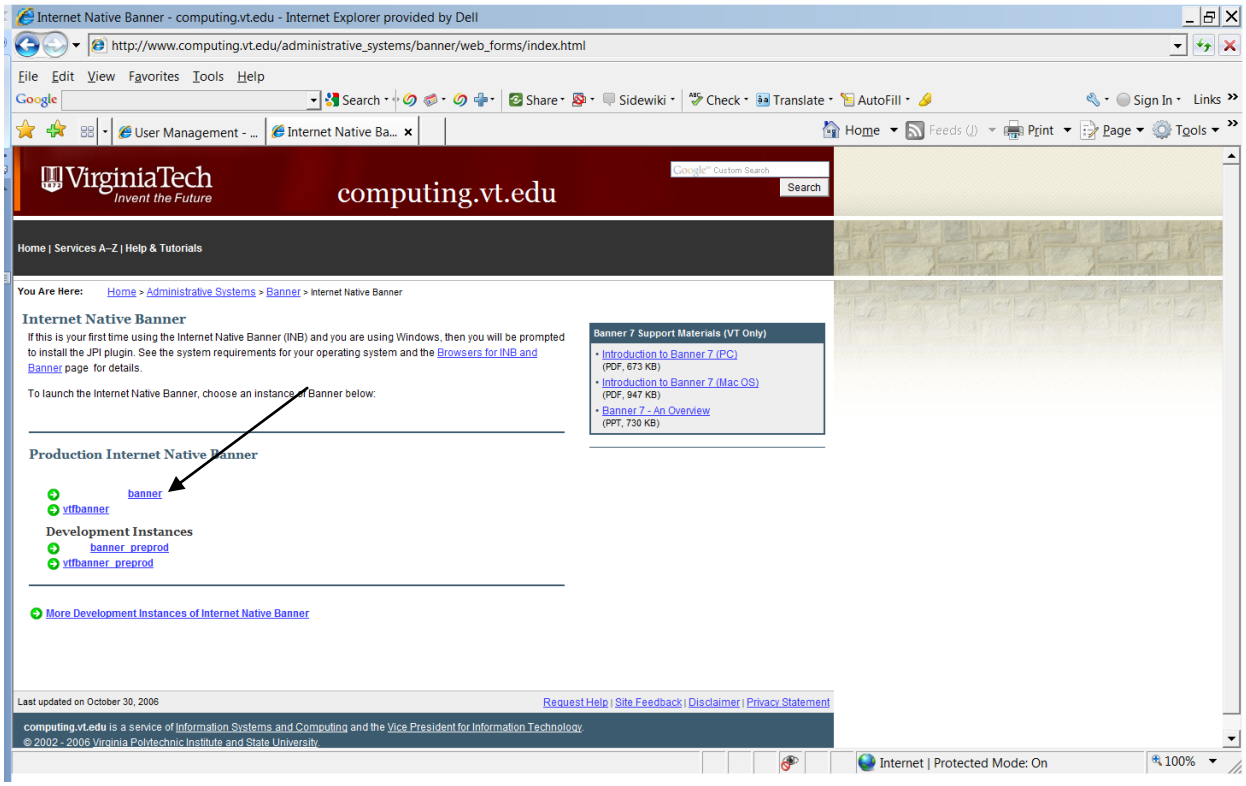
Your computer may already be set up with the Banner icon on your desktop. Clicking this shortcut will take you to the logon screen.

If you do not have a Banner icon, then open a web browser (Netscape, Internet Explorer, Firefox) and enter the URL**: http://www.banner.vt.edu**

Single click "Internet Native Banner".

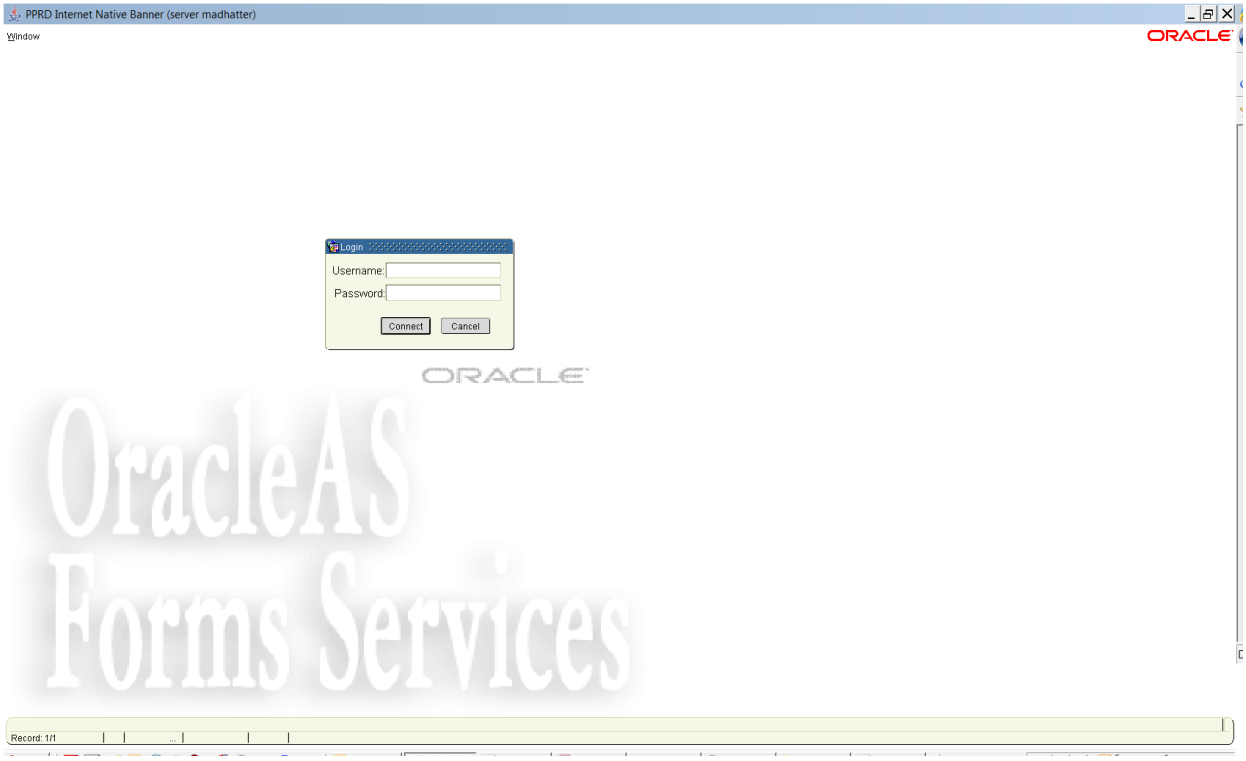


Single Click “Banner” under Production Internet Native Banner.



*****You may select VTFBANNER if you have access to foundation funds**. However VTFBanner is a separate entity. We do not provide access or training for the VTFBanner module or forms.

The logon form will display.



1. Enter your **PID** in the **Username** box. Usually, this will be the same ID you use for email and submitting Leave Reports (without the vt.edu).

2. Type your **<u>Banner</u>** (Oracle) password in the **Password** box. Normally, it is not the same as your email password (unless you have designated it to be).

3. Click the **Connect** button.

4. You will be taken to Banner's main menu called **<u>General Menu GUAGMNU</u>**.

When a Banner session is open, there will be 2 windows on your screen. You should <u>only</u> minimize the 1st while working with Banner Finance. If you close it, you will automatically be logged off and will need to log on once again. Internet Native Banner requires both windows to remain open to work effectively on your computer.

Logging Off Banner

There are three ways to completely exit from Banner.

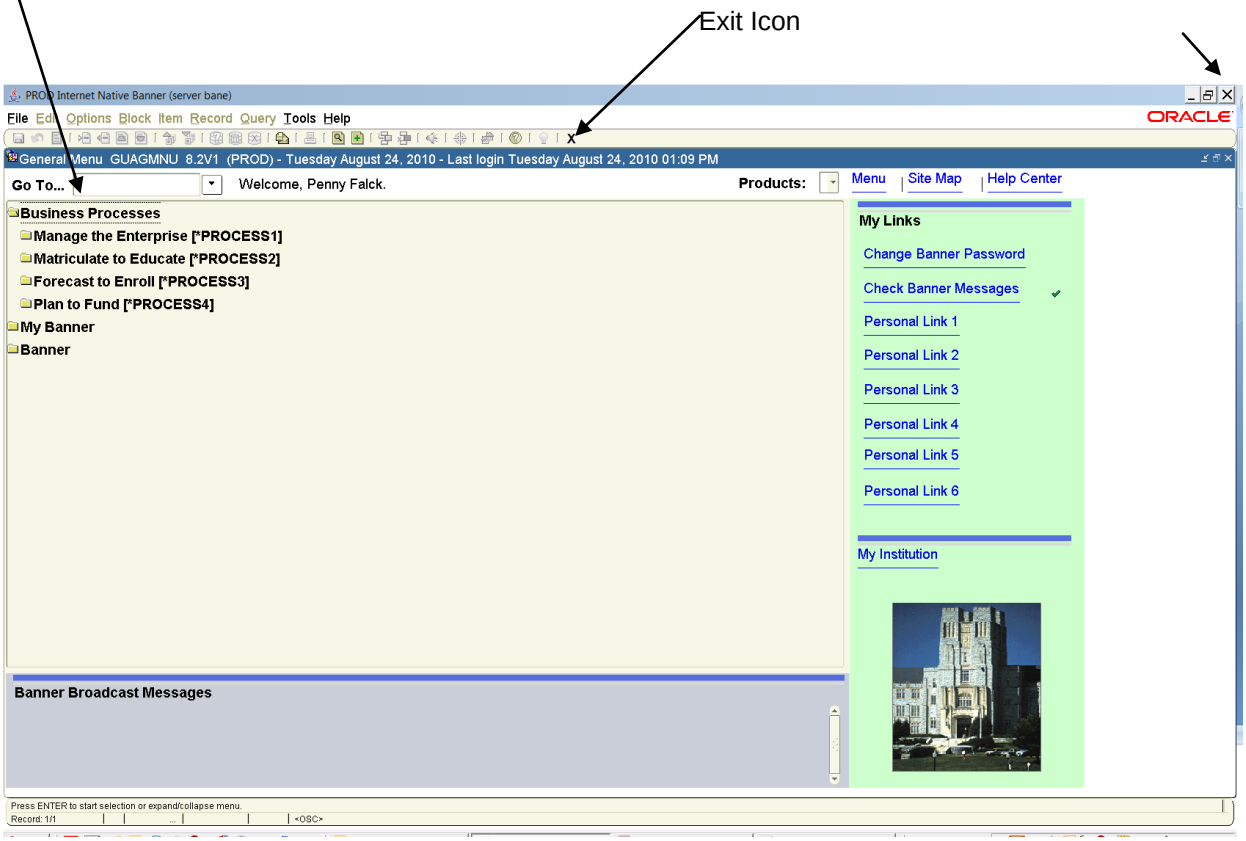
- **First you can** click on the **Exit icon** on the horizontal toolbar or the X at top right of the screen.

OR

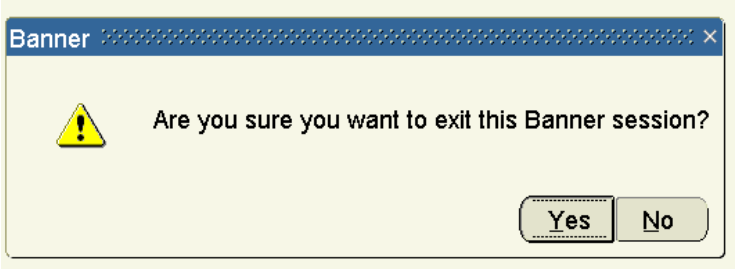
- Select **File** under the Menu bar, and then select **Exit**.

OR

- **Type EXIT** in the **Go To** box at the top of the Main Menu form. Exiting from Banner automatically logs out the Banner session.



An Alert Box will display on either option, asking “Are you sure you want to exit this Banner Session?” Click **Yes** or **No**.



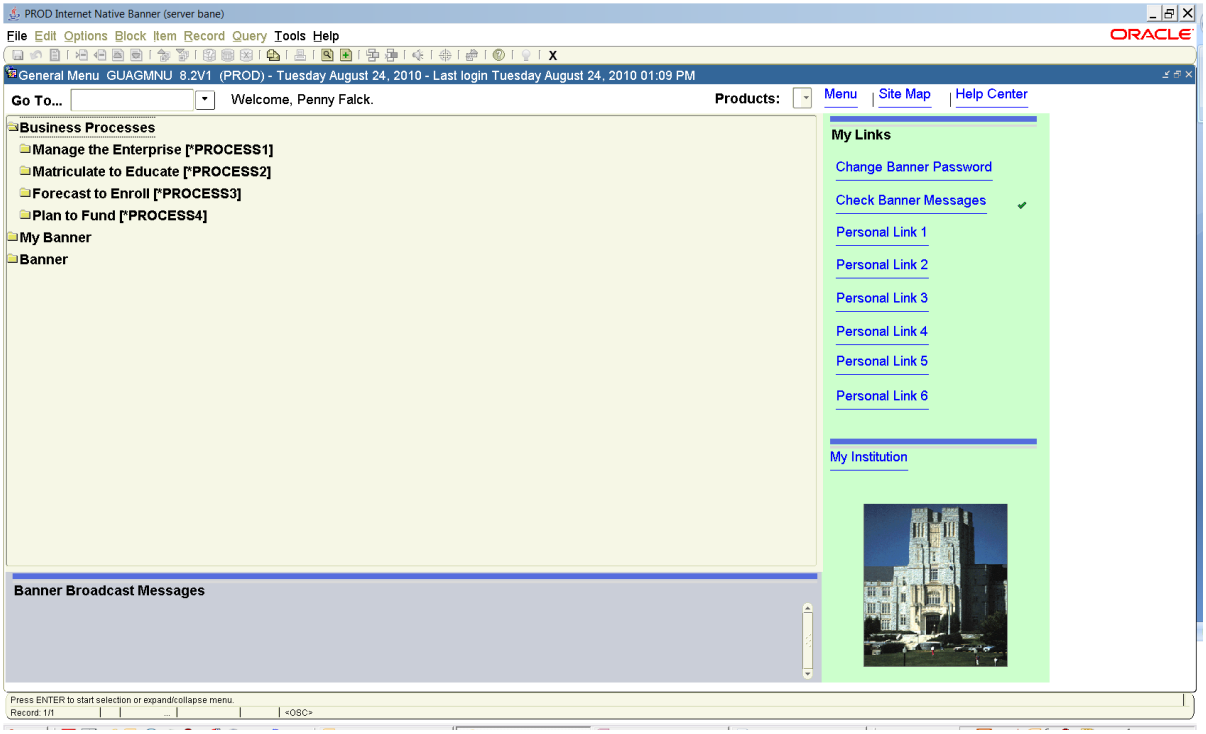
After 25 minutes of inactivity a Banner alert box will appear to notify you of inactivity. If you do not click the OK button your Banner session will be automatically terminated.

Banner Navigation

Within Banner there are numerous ways to perform the same function. This manual will discuss all the various navigation techniques. It is up to you to find the technique or method that works best for you in your job situation.

Main Menu

The first Banner screen is the Main Menu. It will display upon entry into the Banner system.



There are three menus on this form:

Business Process Menu,
My Banner
Banner.

Clicking on the folder next to each menu provides additional options beneath that selected menu.

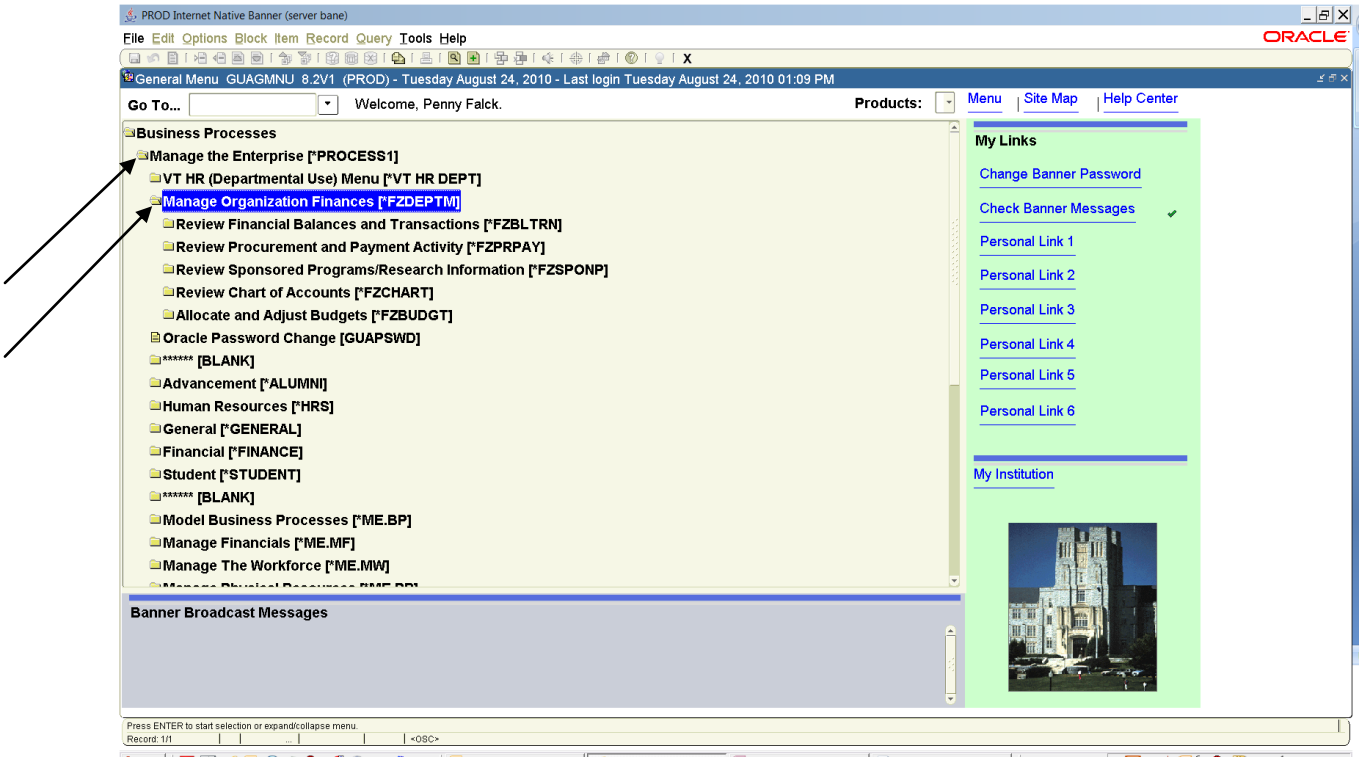
Business Processes Menu includes Virginia Tech developed menus.

My Banner contains your “personal” menu which will be discussed in more detail at the end of this training session.

Banner offers a menu of ALL available Banner Systems.

The **"Manage the Enterprise" menu** (located under the Business Process menu), includes the Virginia Tech developed menus for Finance and Human Resources.

Double Click "**Manage the Enterprise"**
Double Click "**Manage Organization Finances"**

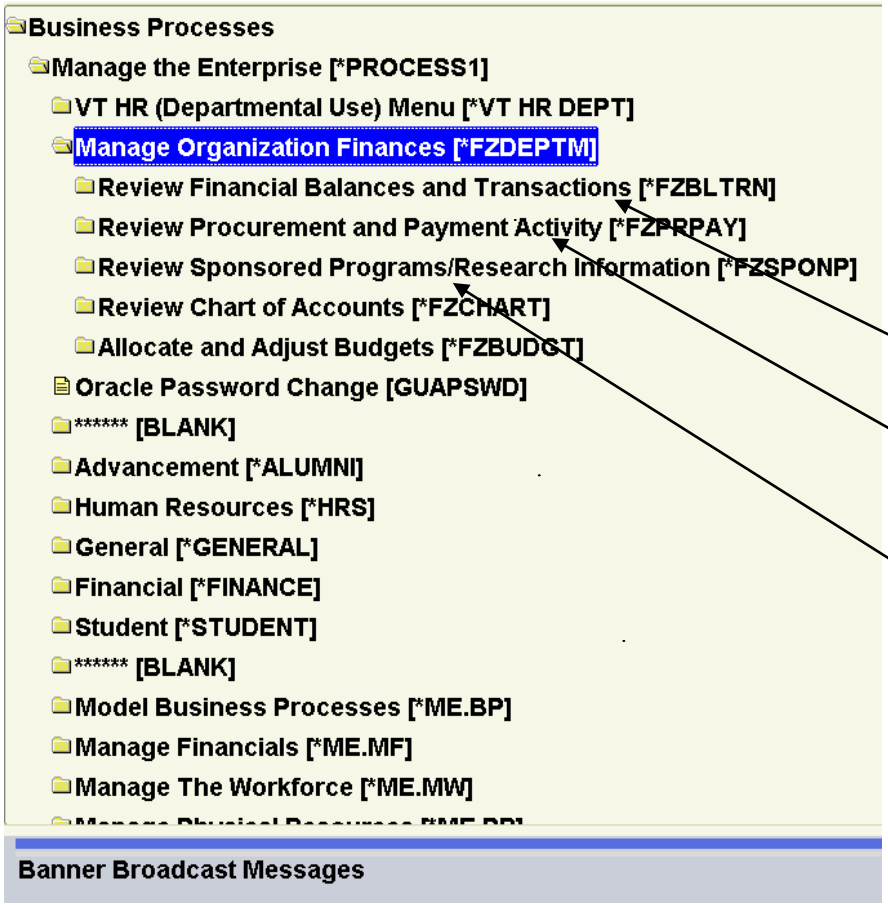


There are several ways to navigate from the Main menu to drill down to the particular form you want.

The displayed menu is expandable, collapsible and scrollable. To expand or collapse a menu, double click on the menu item.

- when an open folder precedes a menu item, the menu item has been opened
- when a closed folder precedes a menu item, the menu item has <u>not</u> been opened
- To close an open menu item, simply double click on the menu item with an open folder in front of it

This menu may change as Banner items are modified or updated. In order to locate the appropriate menu item to complete a task; try to imagine the process that you are attempting to perform. For our purposes, we will be working in the "**Manage the Enterprise"** process menu. Find the "Manage Organization Finances" subset and open it. The forms addressed in this manual are all found there.



Within each of these subsets, reside the forms that will enable you to perform the various functions described by the heading.

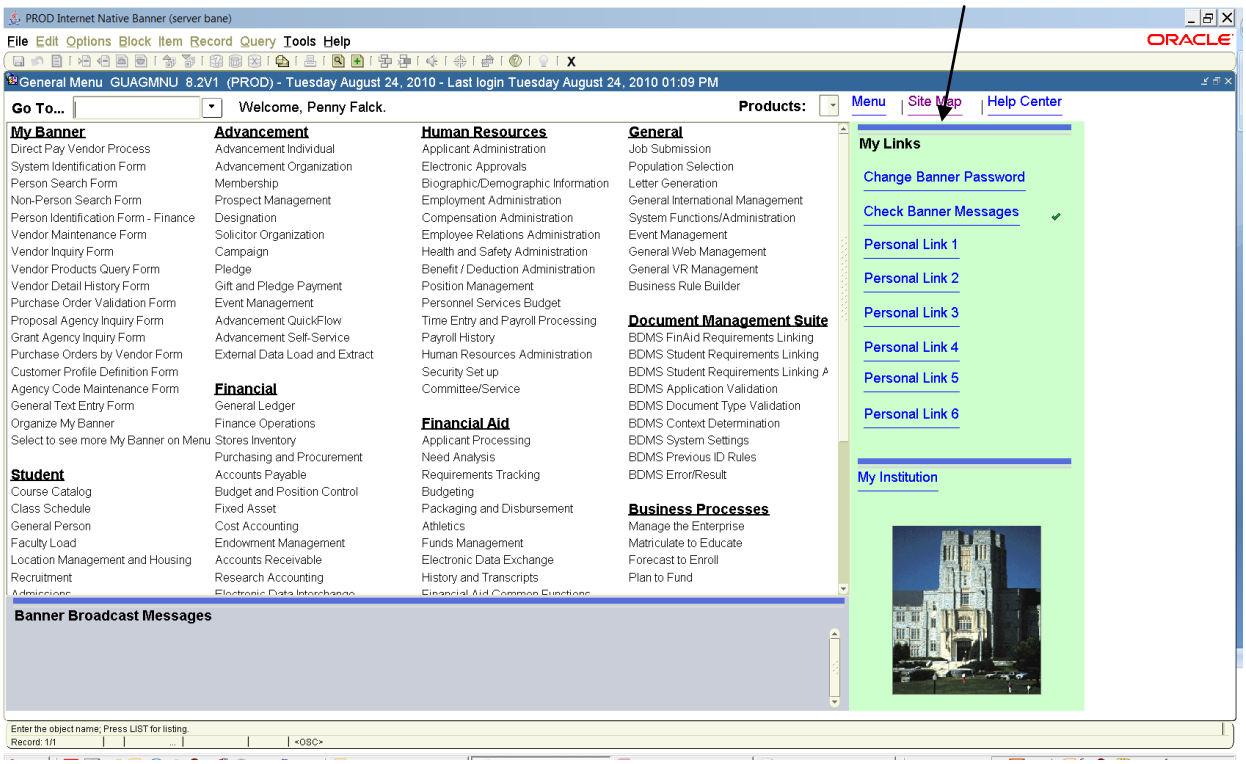
Review Financial Balances and Transactions - General Accounting forms

Review Procurement and Payment Activity - Purchasing and Accounts Payable Information

Review Sponsored Programs/Research Information - Query on Grants and Proposals

Site Map

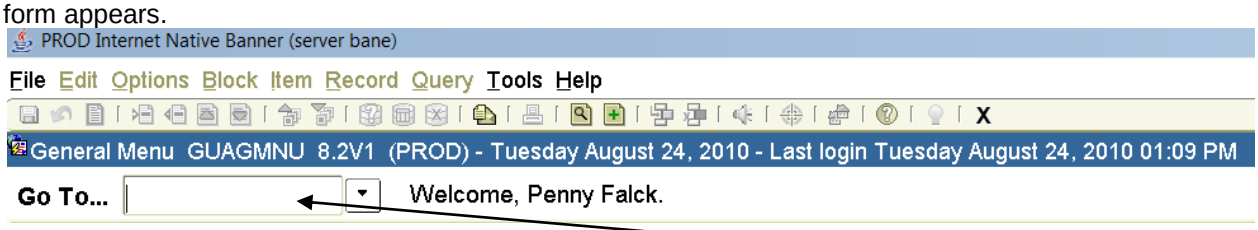
Another way to navigate the menu is to use the Site Map pictured below. You can view the site map by clicking on **"Site Map"** on the right hand side of the main menu screen. The different menus will be displayed vertically. By double clicking a form, it will direct you straight to that particular form. By double clicking a Bolded group menu, it will provide a listing of those qualifying forms/processes to select from.



Direct Access

Shortly after you begin working in Banner, you will learn the form names you need to perform your job and it will no longer be necessary to navigate to the forms from the menu. You can directly access forms and menus with their seven-character name.

From the Main menu enter the name of the object in the **Go To** field and press **Enter.** The requested form appears.



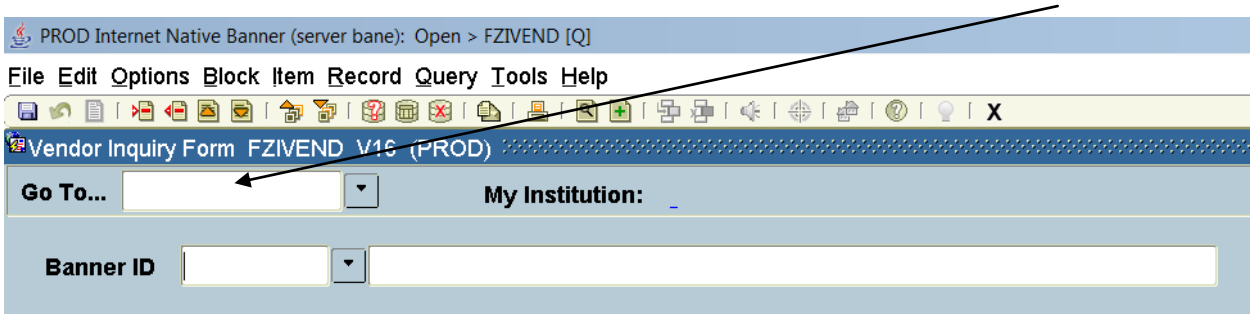
Type in a valid form name here

You can also perform Direct Access from a Form without going back to the Main Menu

1. Select the **Direct Access** function from the **Menu Bar** under **File** option.
2. After typing the form name in the **Go To** box, press **Enter**. The requested form or other object appears.

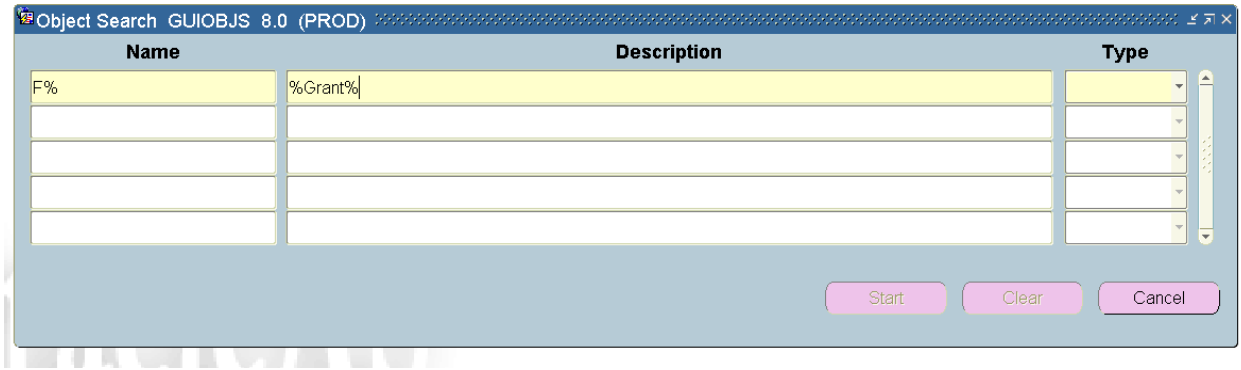
The F5 shortcut key can also be used to automatically display the Direct Access window. The F5 shortcut key will also close the Direct Access window.

Type in a valid form name here



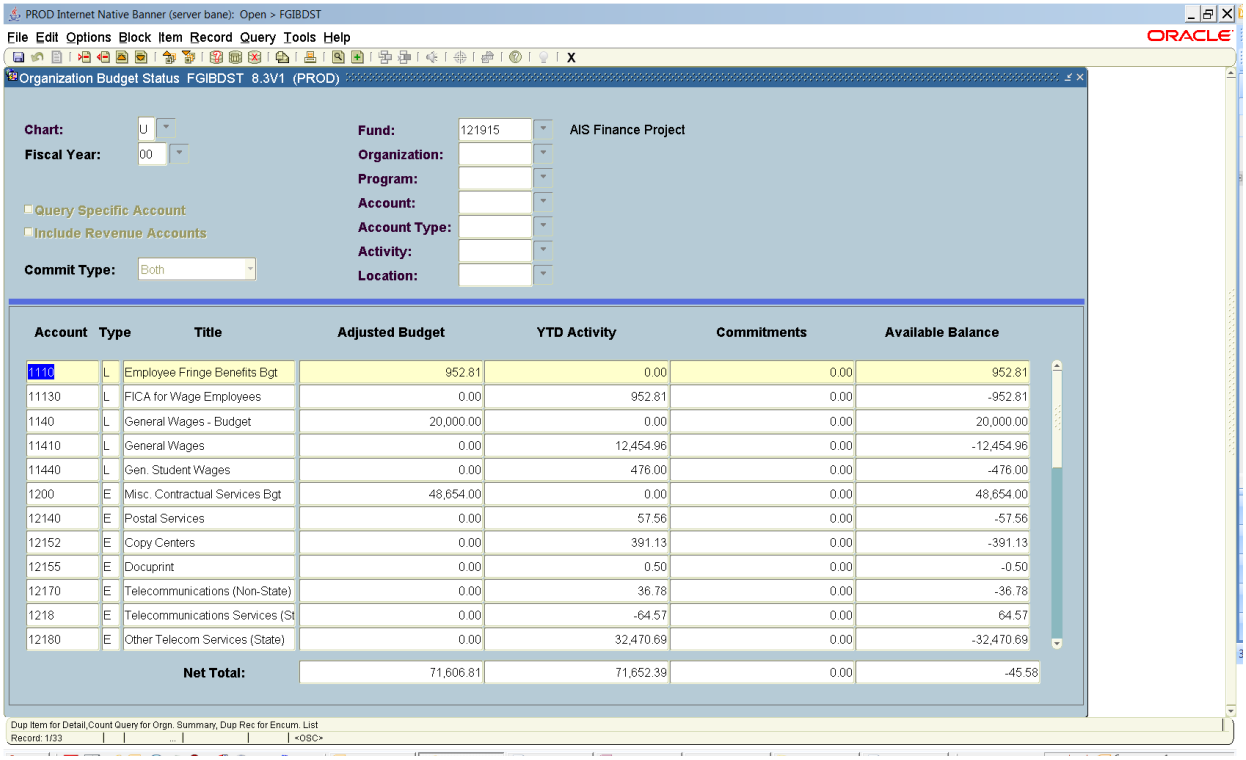
Banner TIP:

*If you do not know the name of the form, you can find it by clicking on the **Search** button* *to call the **Object Search Form** where you can query object names. Enter your query information, then Perform an execute query function which is discussed at the end of the training maunal.*

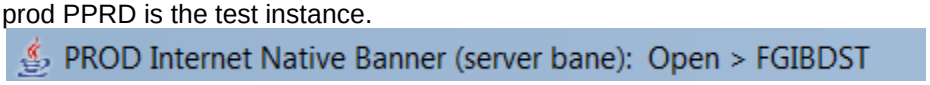


Parts of Banner Forms

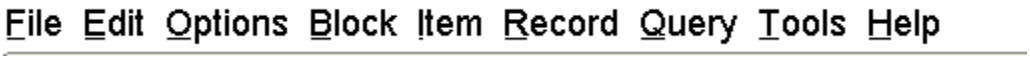
The form we will refer to the most for training purposes is FGIBDST. This form, its functions, and the information it provides will be discussed in greater detail in the General Accounting training session, not during Navigation training.



Banner Title Bar displays the descriptive form name, the seven character form name, the Banner version number, and the instance name. This appears on all Root Windows. PROD is live Banner. Pre-prod PPRD is the test instance.



Menu Bar is a bar across the top of the form that has pull-down menus that contain navigation functions. To access the pull-down menu, [**CLICK**] on the menu name. This will display the items on the pull-down menu. Move the MOUSE pointer to highlight the item to be selected, and [**CLICK**] to activate the highlighted choice.

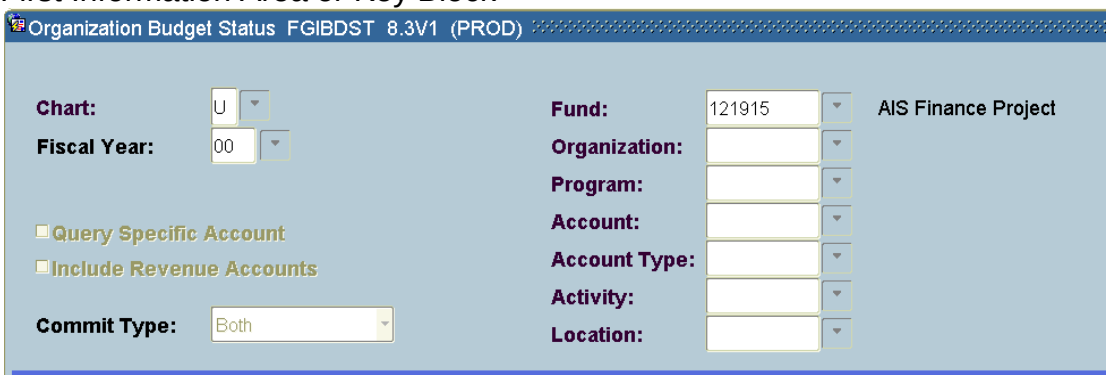


Tool Bar is a bar across the top of the form that contains icons representing common, frequently used navigation functions.

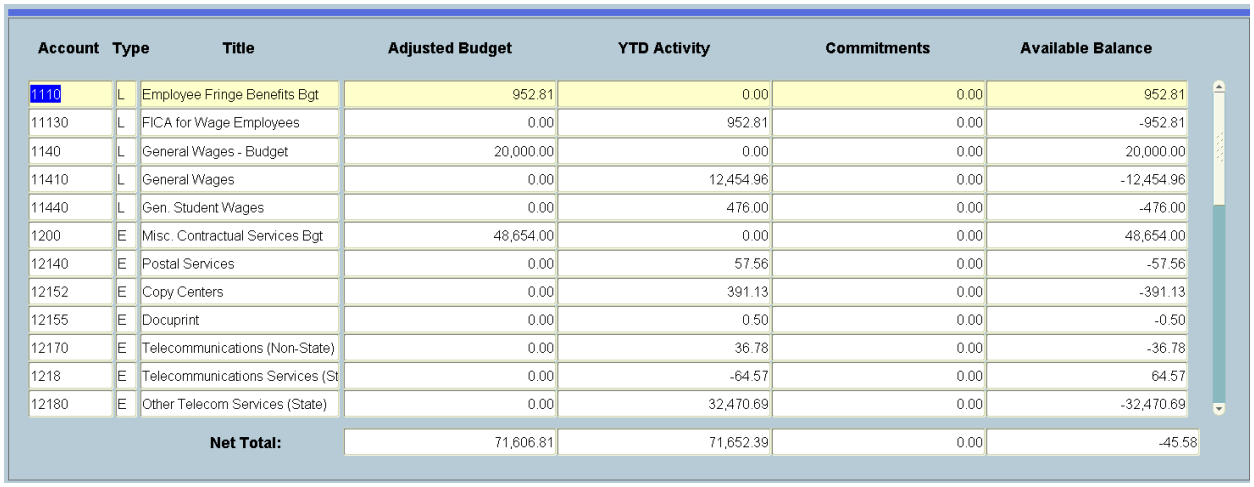
The **Information Area** is an area, or a BLOCK, on a form that contains related information. A form may have more than one block. A "Block Title" or solid line may separate an information area. There are four ways to navigate through these blocks. The information areas or key blocks are separated by a dark line. The dark line indicates that action is required to navigate further.

Key Information or Key Block is the first block on many Banner forms. The information keyed into this area of the form is the deciding factor for what will be displayed on the rest of the form. Since the key is one of the most basic elements on a form, it is always displayed. On forms that have more than one window, subsequent windows are displayed beneath the key. When the cursor is in the key block, the enterable fields are enabled; once you've moved the cursor to another area, the enterable fields in the key are disabled.

First Information Area or Key Block

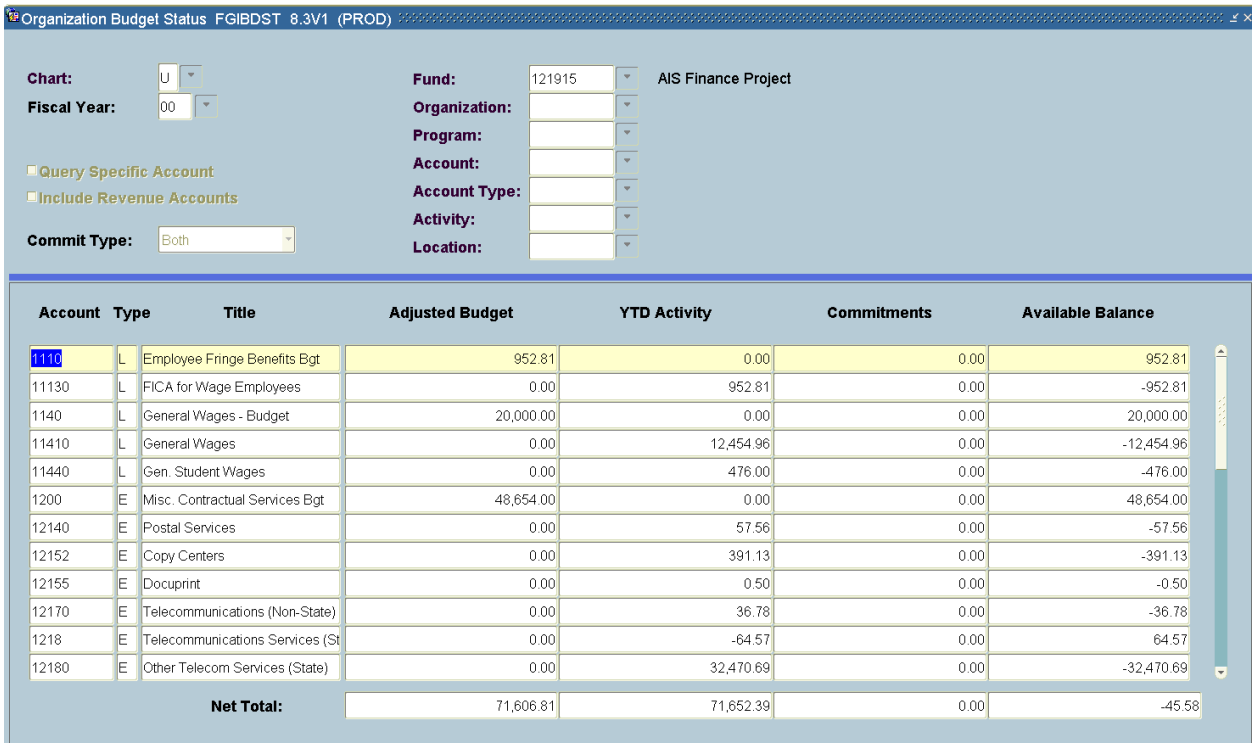


Second Information Area or Block



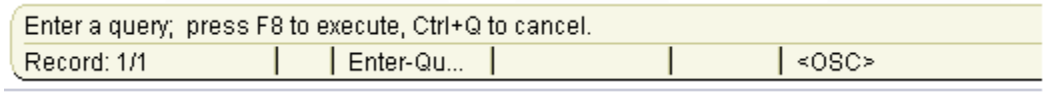
Account	Type	Title	Adjusted Budget	YTD Activity	Commitments	Available Balance
1110	L	Employee Fringe Benefits Bgt	952.81	0.00	0.00	952.81
11130	L	FICA for Wage Employees	0.00	952.81	0.00	-952.81
1140	L	General Wages - Budget	20,000.00	0.00	0.00	20,000.00
11410	L	General Wages	0.00	12,454.96	0.00	-12,454.96
11440	L	Gen. Student Wages	0.00	476.00	0.00	-476.00
1200	E	Misc. Contractual Services Bgt	48,654.00	0.00	0.00	48,654.00
12140	E	Postal Services	0.00	57.56	0.00	-57.56
12152	E	Copy Centers	0.00	391.13	0.00	-391.13
12155	E	Docuprint	0.00	0.50	0.00	-0.50
12170	E	Telecommunications (Non-State)	0.00	36.78	0.00	-36.78
1218	E	Telecommunications Services (St	0.00	-64.57	0.00	64.57
12180	E	Other Telecom Services (State)	0.00	32,470.69	0.00	-32,470.69
		Net Total:	71,606.81	71,652.39	0.00	-45.58

Window Area is the entire framed presentation of the form. More than one window can be open at once. Windows can be resized and moved.

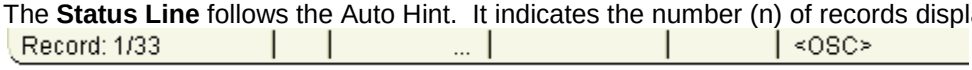


Account	Type	Title	Adjusted Budget	YTD Activity	Commitments	Available Balance
1110	L	Employee Fringe Benefits Bgt	952.81	0.00	0.00	952.81
11130	L	FICA for Wage Employees	0.00	952.81	0.00	-952.81
1140	L	General Wages - Budget	20,000.00	0.00	0.00	20,000.00
11410	L	General Wages	0.00	12,454.96	0.00	-12,454.96
11440	L	Gen. Student Wages	0.00	476.00	0.00	-476.00
1200	E	Misc. Contractual Services Bgt	48,654.00	0.00	0.00	48,654.00
12140	E	Postal Services	0.00	57.56	0.00	-57.56
12152	E	Copy Centers	0.00	391.13	0.00	-391.13
12155	E	Docuprint	0.00	0.50	0.00	-0.50
12170	E	Telecommunications (Non-State)	0.00	36.78	0.00	-36.78
1218	E	Telecommunications Services (St	0.00	-64.57	0.00	64.57
12180	E	Other Telecom Services (State)	0.00	32,470.69	0.00	-32,470.69
		Net Total:	71,606.81	71,652.39	0.00	-45.58

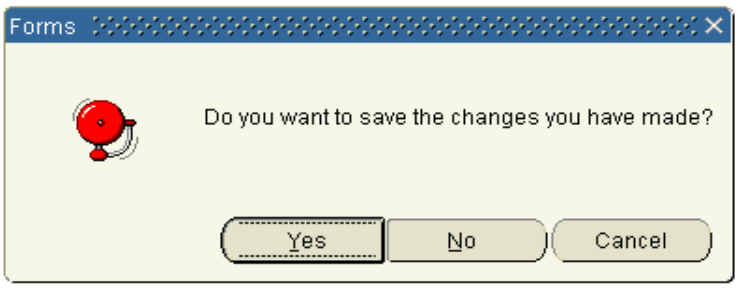
Auto Hint or the Help line displays information concerning the purpose of a field, what you can do next, Navigation instructions, or error messages. It is the first line at the bottom of the window.



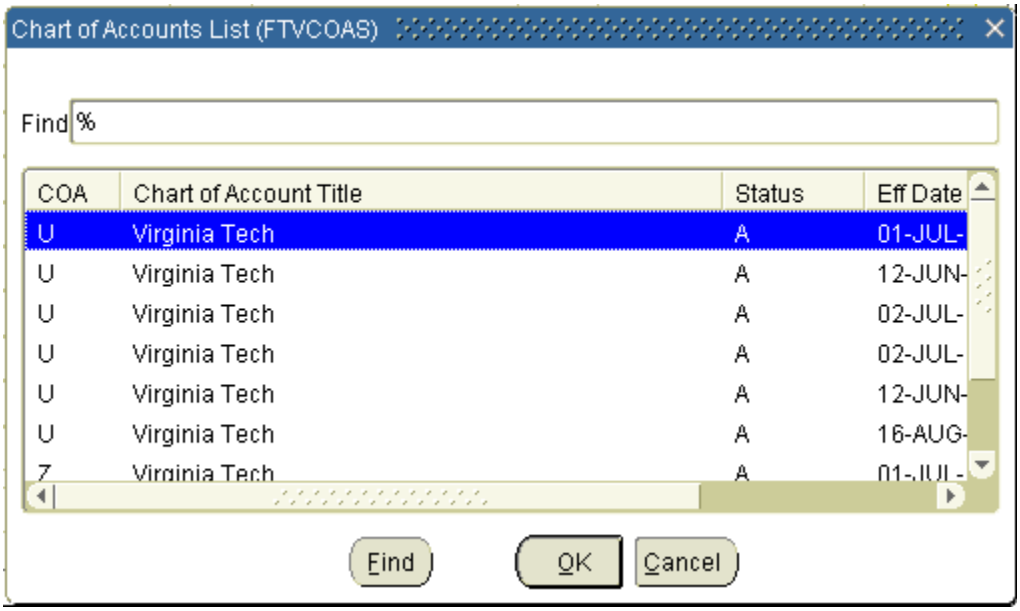
The **Status Line** follows the Auto Hint. It indicates the number (n) of records displayed.



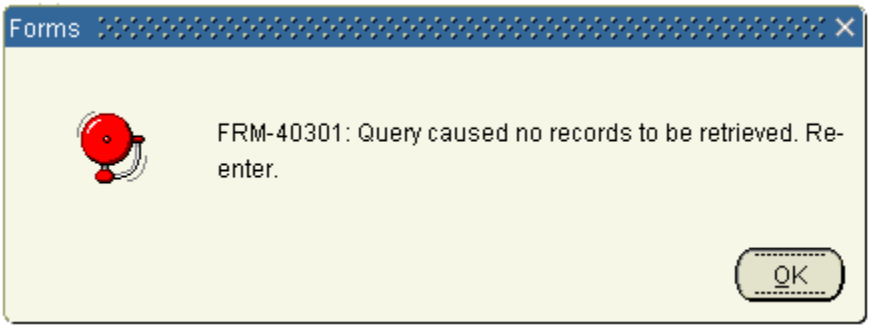
Dialog Box is a window that "pops up" when Banner is awaiting a response. Dialog boxes frequently are "fail-safe" mechanisms to allow you to confirm the action you are about to take. This dialog box pops up when you try to exit a form without saving your changes.



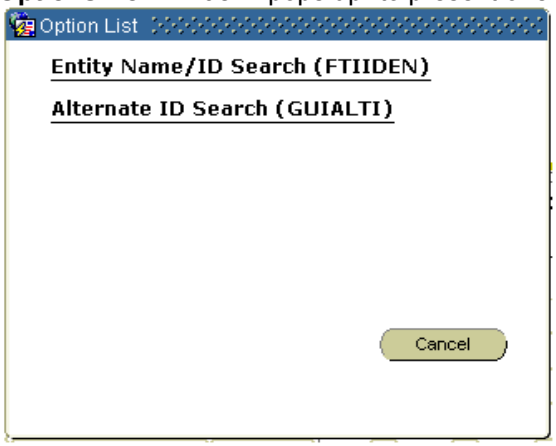
List of Values (LOV) is a window that "pops up" when a highlighted field button has been activated. The List of Values window displays valid values for the field. Clicking on the highlighted value will cause that value to be entered on the calling form.



The Alert Box is a window that "pops up" to alert to a condition that may adversely affect your entry. Data inconsistencies and error messages are displayed in Alert Boxes. You MUST respond to an Alert Box before you can do anything else in Banner.



Options Box window "pops up" to present one or more navigational or form choices.



Field Name and Field A literal description of the field and an area to enter the field's contents. Fields may be *Enterable (Enabled)* or *Disabled (Display Only)*.

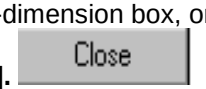
Enterable (Enabled):

Text in the field is highlighted (dark black).
Cursor can be put in the field.
Information can be entered.

Disabled:

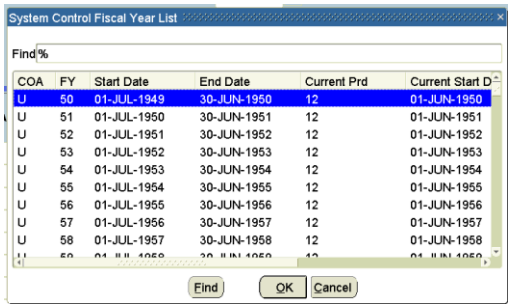
Text in the field is lightened (gray).
Cursor cannot be put in the field.
No information can be entered.

Column When a window has several related fields, they may be displayed in rows. When a number of rows appear in a window, the fields that are repeated in each row are arranged into columns. Forms with multiple columns and rows can be queried on. We will discuss queries in a bit.

Button is a highlighted, 3-dimension box, or rectangle. To activate a button, position the mouse pointer on the button and **[CLICK].** 

Search Button Some fields have a search button after their value box. By single clicking on the search button, it generally takes you to a list of values, query form, or options list.

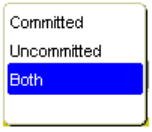
- **List of Values or LOV** discussed earlier -- this is a pop-up window that contains the list of the valid codes or values that may be entered in the field.



COA	FY	Start Date	End Date	Current Prd	Current Start D
U	50	01-JUL-1949	30-JUN-1950	12	01-JUN-1950
U	51	01-JUL-1950	30-JUN-1951	12	01-JUN-1951
U	52	01-JUL-1951	30-JUN-1952	12	01-JUN-1952
U	53	01-JUL-1952	30-JUN-1953	12	01-JUN-1953
U	54	01-JUL-1953	30-JUN-1954	12	01-JUN-1954
U	55	01-JUL-1954	30-JUN-1955	12	01-JUN-1955
U	56	01-JUL-1955	30-JUN-1956	12	01-JUN-1956
U	57	01-JUL-1956	30-JUN-1957	12	01-JUN-1957
U	58	01-JUL-1957	30-JUN-1958	12	01-JUN-1958

- **Query or Inquiry Form --** this is a form used to check information already in the system and then select from that information and insert it back in the originating form.
- **Options List --** this is an interim window that sometimes displays when there are multiple processing options available. The user clicks the desired option to proceed or clicks Cancel to go back to the originating form.

Pull-down List Displays a list of several values that can be entered into a field. To access the values in the list, [CLICK] on the arrow at the right side of the pull-down list to display the values. You can type a character to highlight the first item that begins with that character



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Check Boxes Appear as Small square boxes, to activate a Check Box, position the mouse pointer in the box, and [CLICK]. An "√" will be displayed in the box. If a "√" is already there, position the mouse pointer in the box, and [CLICK]. The "√" will be erased.

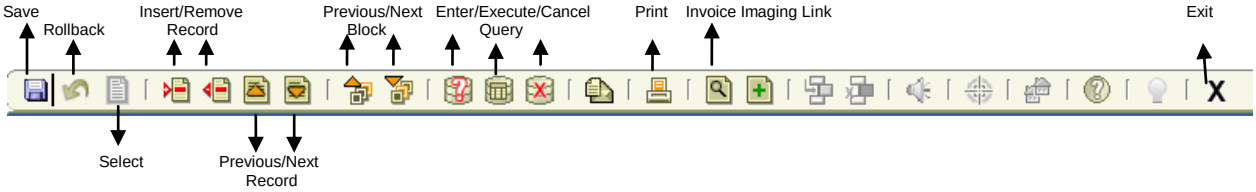
☐ **Query Specific Account**

☐ **Include Revenue Accounts**

Methods of Navigation

Banner Icon (Tool Bar) Query Navigation

The tool bar is located under the menu bar and contains icons representing common functions. If you are running in a Microsoft Windows environment, the name of the icon appears as you move the cursor over the icons.



SAVE

The save icon is not used very often by the Banner user with query only access. The save button is used mostly to save entered records or to submit reports.

ROLLBACK

Clears information in the output area (block) of a query form and returns to the first enterable field in the input information area (key block).

SELECT

Takes a value from a listing and moves value to a field. The Select icon is grayed out if the option is not available. Otherwise it will appear orange.

ENTER QUERY

Puts the form in query mode and lets you enter search criteria to see what information is already in the database. **ENTER QUERY** appears on the **Status Line**.

EXECUTE QUERY

Searches the data base and displays any records that match the search criteria.

CANCEL QUERY

Takes the form out of query mode and cancels the query.

PREVIOUS BLOCK

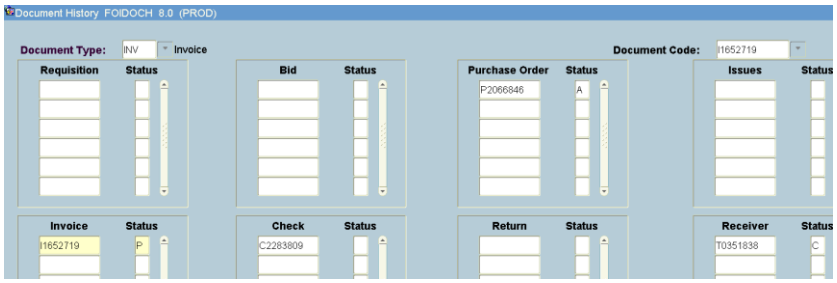
Moves the cursor to the previous information area (block) that has at least one enterable field. If the previous area is in another window, that window is opened.

This Icon is disabled, use the ROLLBACK function instead

NEXT BLOCK
On query forms, this function is primarily used to move to and populate the output area (block) of a form after the selection criteria have been entered in the key block. Moves the cursor to the next information area (block) that has at least one enterable field. If the next area is in another window, that window is opened.

PRINT
Prints an image of the current Banner Screen.

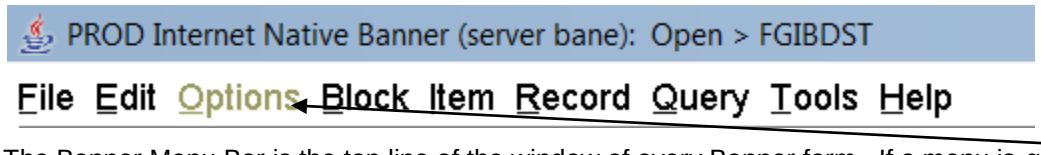
IMAGING LINK
Access form FOIDOCH in Banner to use this icon. Have to have Invoice number keyed into Document Code Block and Invoice Number Highlighted in invoice Block before Icon will work.



EXIT
Closes the current form that is open.

Banner Menu Bar

The Banner Menu Bar



The Banner Menu Bar is the top line of the window of every Banner form. If a menu is *grayed*, it is unavailable or disabled as shown for the Options Menu above.

Use the Banner Menu Bar to navigate by clicking on a word with the mouse and holding the mouse button down as you slide the mouse down the form. A menu of choices will appear. When you have highlighted the appropriate choice, release the mouse button to select it.

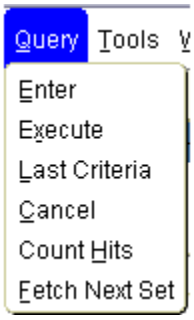
Block Pull-down Functions

Previous -- go to the previous information area (block) if the previous area has at least one enterable field**.(Note: The function is disabled, use the Rollback function instead.)**

Next – on query form this function is primarily used to move to and populate the output area (block) of a form after the selection criteria have been entered in the key block. Moves the cursor to the next information area (block) that has at least one enterable field. If the next area is in another window, that window is opened.

Clear -- clear all of the information displayed from the information area (block).

Query Pull-down Functions



Enter -- put the form into Query Mode.

Execute -- query the database for all records that match the search criteria.

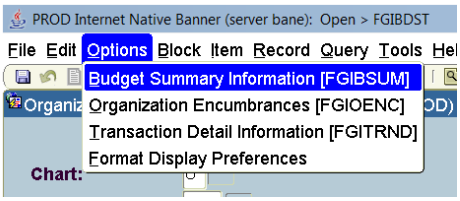
Last Criteria -- in Query Mode, supply the criteria from the last search (only works when *ENTER QUERY* displays in the Status Line).

Cancel -- cancel the query and take the form out of Query Mode (*ENTER QUERY* is no longer displayed in the Status Line).

Count Hits -- count the number of records that meet the search criteria and display the value in the Auto Hint message.

Fetch Next Set -- if more records meet the search criteria than fit in the window, replace the current set of displayed records with the next set.

The menu item “Options” will allow the user to navigate to other windows of the current form or to a related form. The pull down function of Options varies depending on the current Banner form. This is an example of the Options pull down functions when the user is on FGIBDST.



Keystroke Navigation

The third method of navigation is using the keyboard. This cheat sheet shows some of the different Banner functions and methods of navigation including the use of short cut keys. You can also access a similar version of this information in Banner by going to the **Help** pull down function on the **Banner Menu bar** and selecting **Show Keys**.

FUNCTION		TOOL BAR	PULL-DOWN MENU BAR ITEM	CHOICE	KEYSTROKES
ROLLBACK			FILE	ROLLBACK	SHIFT + F7
QUERY	ENTER		QUERY	ENTER	F7
QUERY	EXECUTE		QUERY	EXECUTE	F8
QUERY	CANCEL		QUERY	CANCEL	Ctrl + Q
BLOCK	PREVIOUS		BLOCK	PREVIOUS	Ctrl + Page Up
BLOCK	NEXT		BLOCK	NEXT	Ctrl + Page Down
PRINT			FILE	PRINT	Shift + F8
FIELD/ITEM	PREVIOUS		FIELD	PREVIOUS	Shift + Tab
FIELD/ITEM	NEXT		FIELD	NEXT	Tab or Enter
EXIT			FILE	EXIT	Ctrl + Q
SAVE			FILE	SAVE	F10
DIRECT ACCESS			FILE	DIRECT ACCESS	F5

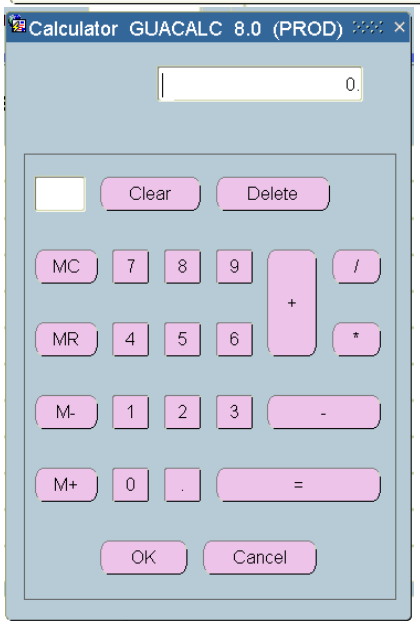
Calculator and Calendar Functions

CALCULATOR

Access the Oracle calculator by going to the GUACALC form. On a form, when you double-click in a numeric field, the calculator form is displayed. You can then perform any calculations and the result will be copied into the field when you click **OK** and exit the calculator.

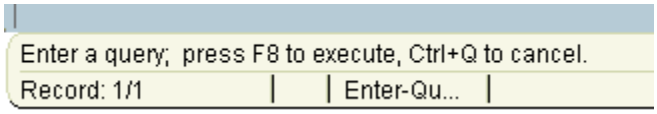
CALENDAR

Access the Oracle calendar by going to the GUACALN form. On a form, when you double-click in a date field, the calendar form is displayed. You can then select a date from the calendar, and the date will be copied into the field when you click OK and exit the calendar.



Performing Banner Queries

Querying is the process of looking up data that has already been entered in the Banner database. Almost all forms can be used to perform queries. Some forms automatically open in query mode because a large number of records would be retrieved. Opening the form in query mode lets you specify search criteria so you can narrow the search. When forms open in query mode, ENTER QUERY appears on the status line.



<u>To perform a query</u>

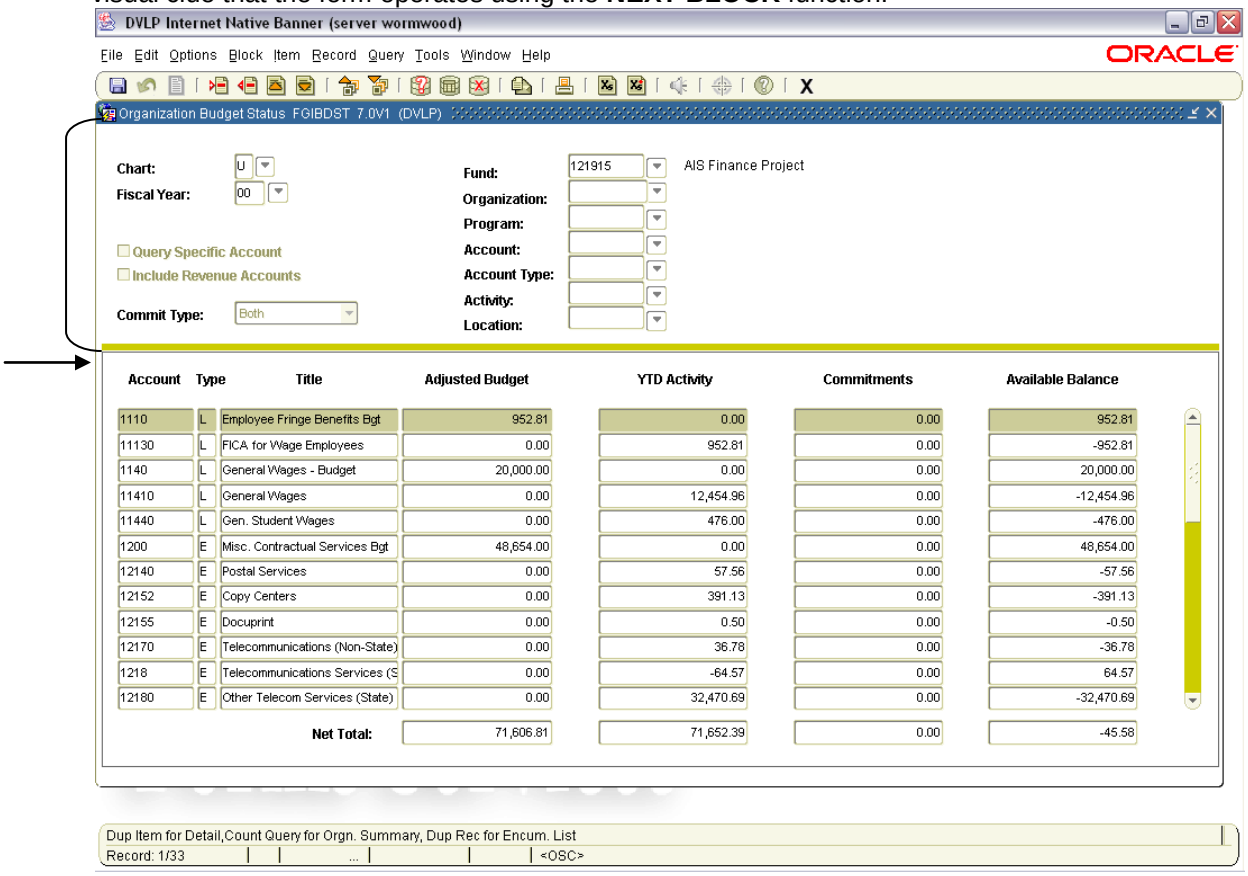
1. Access the form that will display the records you want to query.
2. Perform **ENTER QUERY** using one of the navigation options. If the form opens in Query Mode you do not need to perform an enter query.
3. Enter the query search criteria. You can query on any field to which you have access. The Oracale wildcards are very important to remember. These wildcards to broaden your search criteria. The wildcards are % and underscore.

   % - Represents any number of unspecified characters.
   _ - Represents one occurrence of an unspecified character

   Most Banner searches are case sensitive so capitalization matters!

4. Perform **EXECUTE QUERY** to cause the system to search the database. All records that match the criteria will be displayed.
5. To redisplay the original search criteria so that you can make changes and re-query, perform the **ENTER QUERY** function. The matching records will disappear. Then perform **ENTER QUERY** again. The original search criteria appear. Revise your search and return to Step 3.

As shown previously When inquiry forms have a solid line across them like the one shown below, it's a visual clue that the form operates using the **NEXT BLOCK** function.



- Enter the fund, document number, or other information you are inquiring about in the input (key) block at the top of the form.

- Perform a **NEXT BLOCK** using whichever method you prefer to populate the output area (block) of the inquiry form. The methods include the keystroke (control+pg down), toolbar or menu bar or simply clicking in the next block.

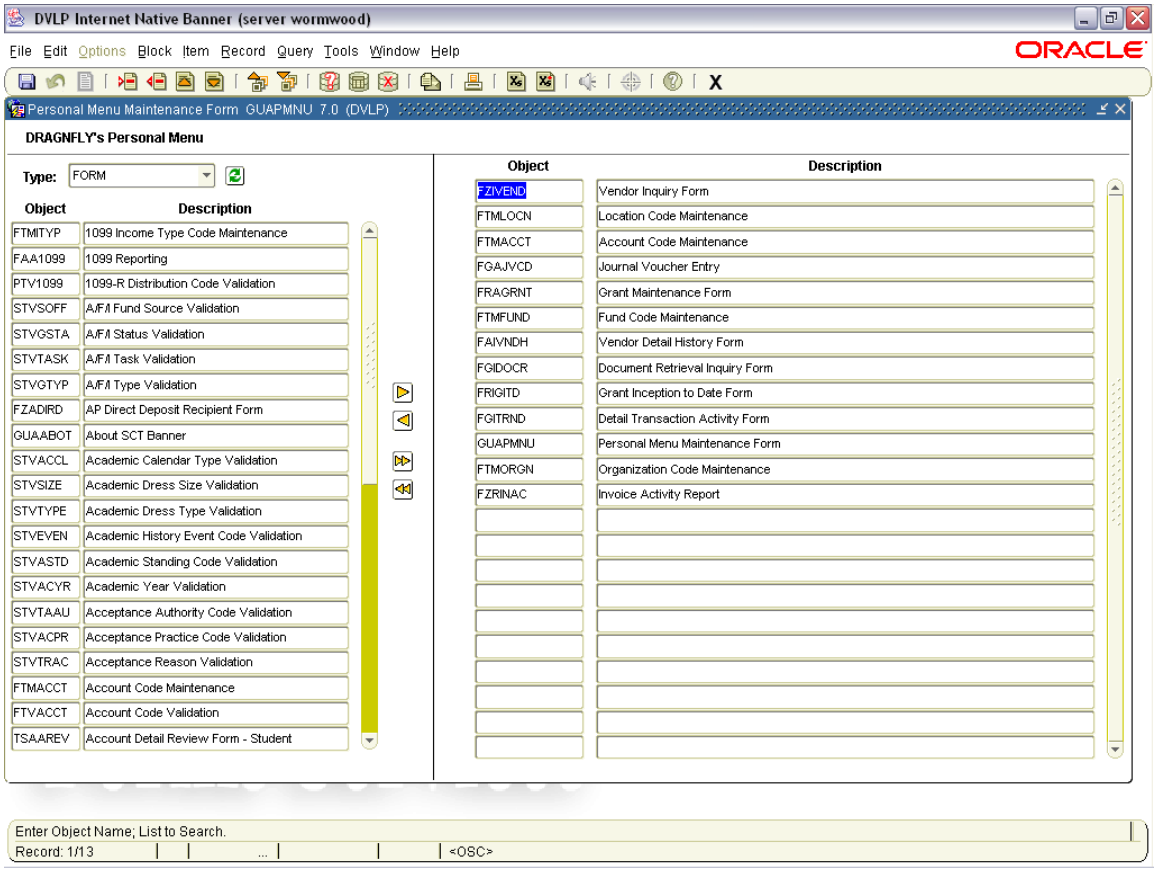
- Many inquiry forms allow the user to narrow the search even further once the cursor is in the output block by performing an **ENTER QUERY**, entering the search criteria, and then performing an **EXECUTE QUERY.**

Setting up My Banner

The final topic in this training manual is setting up “Your” My Banner. My Banner is one of the menus on the Main Menu screen.

A personal Menu or MY Banner can be created to list the forms that you most frequently use. You may access your personal menu from the Main Menu. It is associated with your Oracle user ID and password. This will allow you to access your Personal Menu items from another workstation if you are logged in under your ID.
There may be 8 to 10 forms that a user consistently uses in the performance of their daily jobs. The Personal Menu provides a means for the user to list these in a small group. It makes them easier to access because there is little need for typing in a form name or ‘drilling down’ through a lengthy list. As your responsibilities may change, you may modify your Personal Menu items.
Following are the steps to creating a Personal Menu:

- The Personal Menu Maintenance Form (GUAPMNU) lets you create and change your personal menu. The field above the left pane shows the Oracle user ID associated with the person logged on to the system.
- Access the Personal Menu Maintenance Form (GUAPMNU).



- Use the pull-down list above the left pane to select the object type you want to display. The left pane lists the objects of the selected type that can be added to the menu. **Note:** You can query to reduce the object list. See the Instructions that follow.

- In the left pane, select each object you want to add to the menu by double-clicking on the object name. When you select an object, the name is highlighted. To deselect an item double-click it again.
- (Optional) Repeat the preceding 2 steps for each object type you want to add to the menu. **Note:** You can select objects from multiple object types and insert them together.
- Click in the right pane where you want to place the new menu items.
- Click the Insert Selection button in the middle of the form. The selected objects are added to the right pane below the place you clicked.
- Perform a save function. (F10 or Save Icon)

Query within the list:

As you will notice, the list of all items is quite long. Again, the user has the ability to select the object they want to display through the use of the pull-down list. But also, the user has the ability to query with the list.

Use these steps to reduce the list of object names in the left pane. You can add any of the matches to your personal menu.

- Access the Personal Menu Maintenance Form (GUAPMNU)
- Use the pull-down list above the left pane to select the object type you want to query.
- Place the cursor in the left pane.
- Perform an Enter Query function. The object list disappears.
- Enter the search criteria. The user may use the Oracle wildcards % and _ to assist in the search. Capitalization matters. Data is matched against the search criteria exactly as you enter them.
- Perform an Execute Query function. The left pane lists the matching objects.
- To add all matches to the menu (if there are 20 matches or less), click in the right pane where you want to place the new menu items. Then click the Insert All button (overlapping arrows) in the middle of the form.

Using the 7-character name:

Additionally, the user is able to use the descriptive 7-character name to add items to their Personal Menu.

- Access the Personal Menu Maintenance Form (GUAPMNU).
- Place the cursor in a blank **Object** field in the right pane.
- Enter the object's seven-character name.
- Press Enter. The object's type, description, and name appear in the right pane.
- Perform a Save function (F10 or Save Icon)

****Note: Changes to My Banner will not take effect until after the user exits Banner****

Once we have an active Banner session you can also access the most recently viewed forms under the File drop down on the Banner Menu bar.

Please remember to keep your Banner work station secure. You have access to sensitive information. Please log off Banner or lock your workstation whenever you are not at your desk!!