

The University of North Carolina at Greensboro

Banner Finance Navigation Training

Banner is the software application that UNCG uses to keep track of information about finance, students and alumni. UNCG licenses Banner from SunGardSCT Corporation. UNC-Genie is the Web and portion of Banner that offers functionality for Students, Staff and Faculty. Because Banner contains information about students that is protected by the Family Educational Rights and Privacy Act (FERPA) it is available only to UNCG employees who have a need to know such student information to serve the students as part of their job duties. See http://www.uncg.edu/cha/UNIVERSITY_COUNSEL/FAQ/ for more information.

In order to access Banner you need a computer that is part of the UNCG network either by connecting through Novell or through a VPN (Virtual Private Network). If you need additional assistance with either one of these connections please contact the help desk at 256-TECH. You connect to banner through a web browser; this connection method of Banner is called Internet Native Banner (INB).

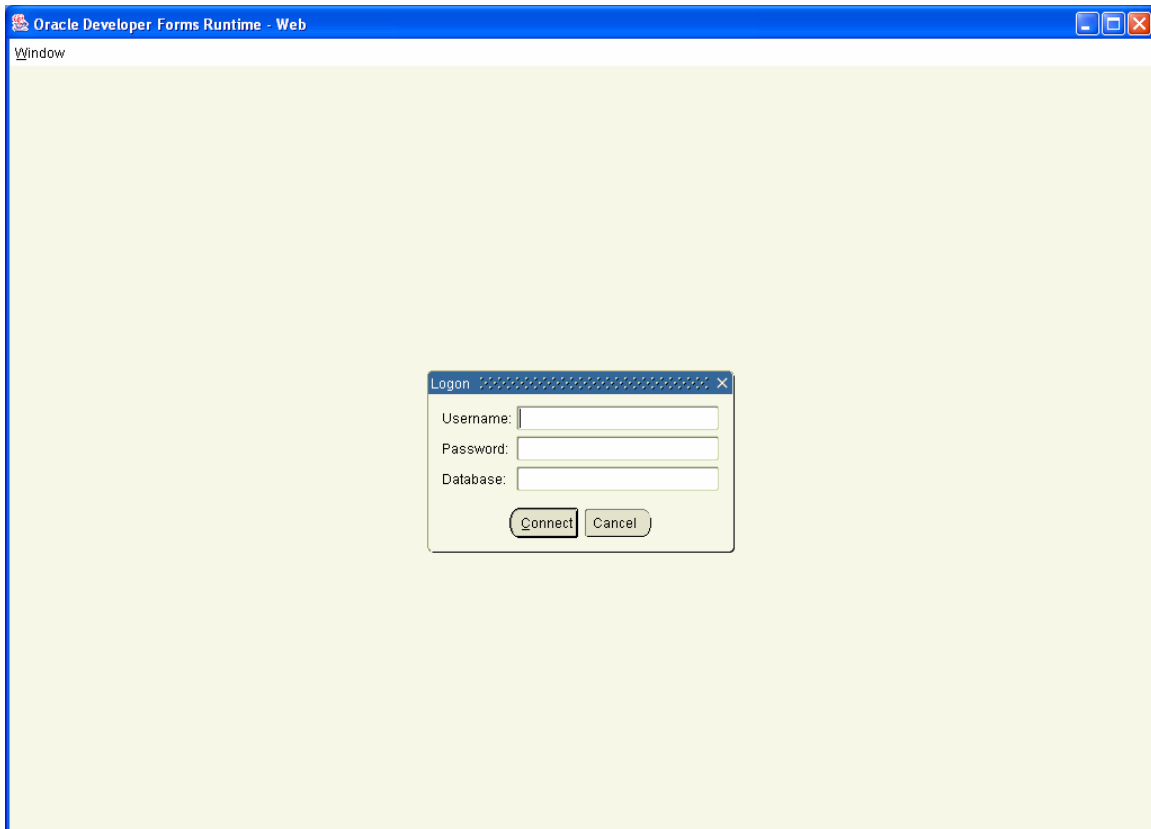
Once you have logged into Novell successfully you may connect to Banner in one of two methods.

1. You should find on your desktop an icon that looks like a folder with the title Application Explorer.
 - a. **Open** the UNCG Applications folder
 - b. **Open** UNCG_TREE folder
 - c. **Open** UNCG BANNER folder
 - d. **Open** Internet Native Banner icon
2. Open your web browser (Internet Explorer preferred)
 - a. **Point** the URL to inb.uncg.edu

Note: The first time you log into Banner you may be asked to install Java and Oracle JInitiator. If you need assistance you can view the web page <http://banner.uncg.edu/inb/> or contact 256-TECH for help.

Once you successfully connect to the banner application you will be prompted to log into the system with your username, password, and database.

Note: Banner is best viewed when your monitor is set at a 1027x768 resolution.



The username and password you have here are not the same as your Novell account. The username may be the same as your Novell account but the passwords are separate and distinct, changing one does not automatically change the other.

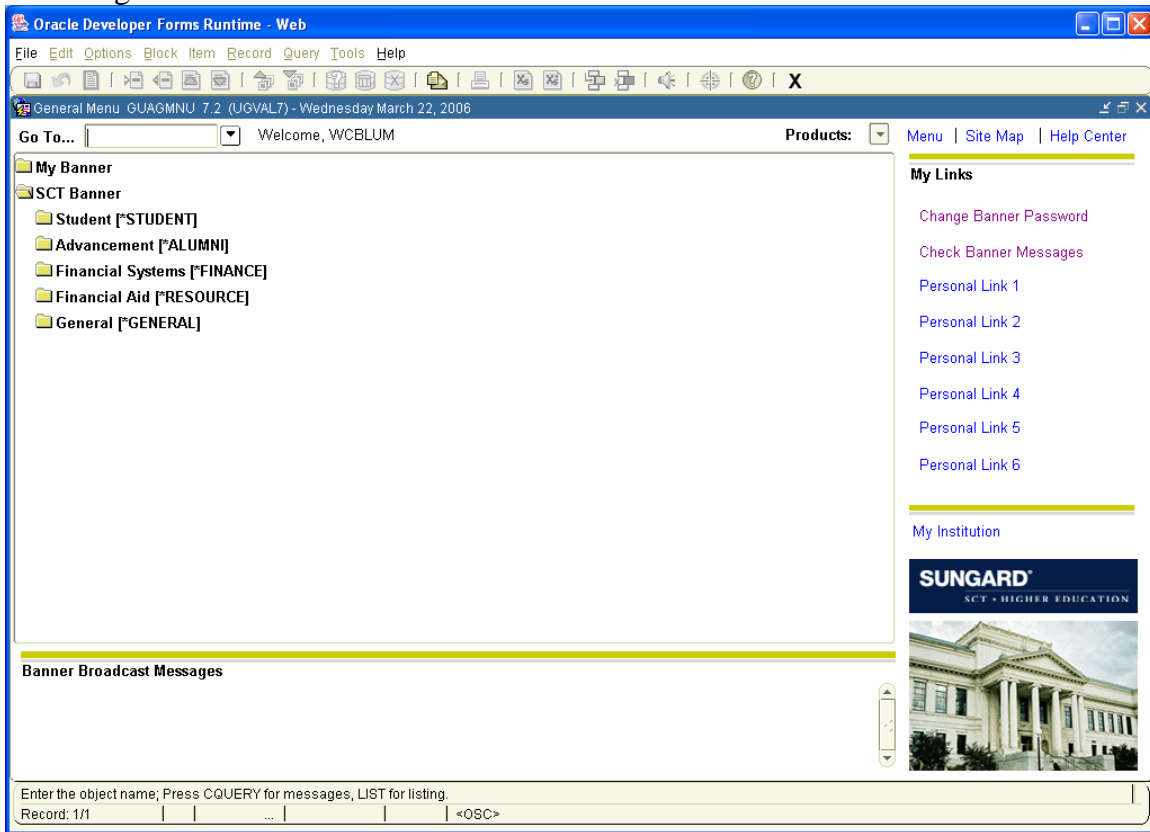
The database will be BANPRD unless you are instructed otherwise, or leaving the database field empty will default to BANPRD.

Since Banner is using the web browser, you may be in the habit of pressing the back button and refresh button with your normal web surfing. These buttons are not functional within INB and will prompt you to log into the system again if you press them.

Once you have logged into Banner you will be at the main menu.

Banner Forms

When you first log into Banner (following the steps above) you will be presented with the following screen.

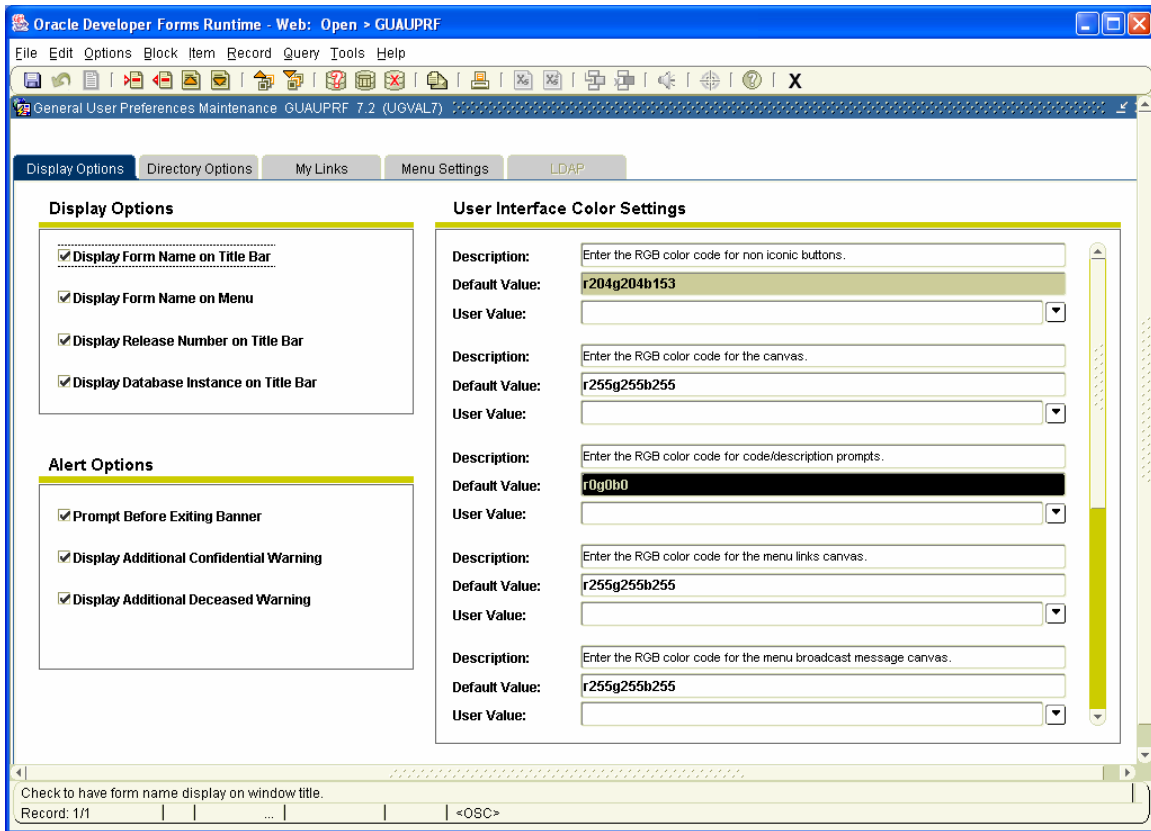


Overarching Banner Principles:

Time-Out: As a security feature, if you do not actually use a form to pull up data for a period of one hour, the session will disconnect and no longer function. You will get an error message stating either connection timed out or that you not logged on. You will need to refresh your browser and log in again.

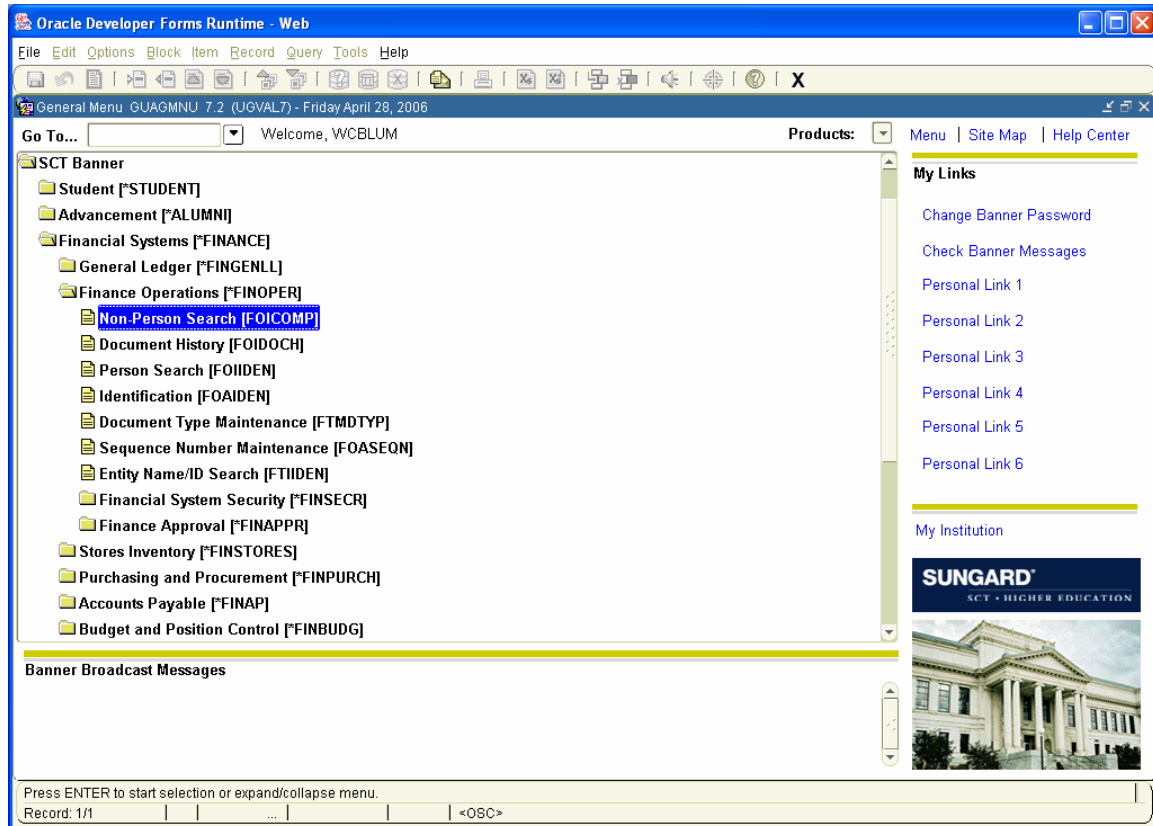
Form/Object Names: Most items in Banner have a unique seven character name. Forms or screens can be accessed via menus or by entering the name of the form directly in the “Go:” box on any menu.

Direct access can be used to reach any Banner form for which you know the seven character name. The Banner form names are not automatically displayed in your menu. To have them displayed, click on File and then Preferences from the menu bar. The following screen will appear.



You need to check beside of the first two display options to have the form name displayed on your menu. When you are finished, click on the save icon on the menu bar to return to the main menu. You will be prompted that your changes will take effect after exiting and returning to the Banner system. Click OK.

Major groupings of Banner functionality are found under the SCT Banner Menu on the left hand side of the screen. **Click on the Financial Systems Menu.** Under Financial System Menu you will notice all areas of the finance system. **Click on the Finance Operations Menu.**



Click on the Non-Person Search (FOICOMP) to proceed and learn how to look up a non-person.

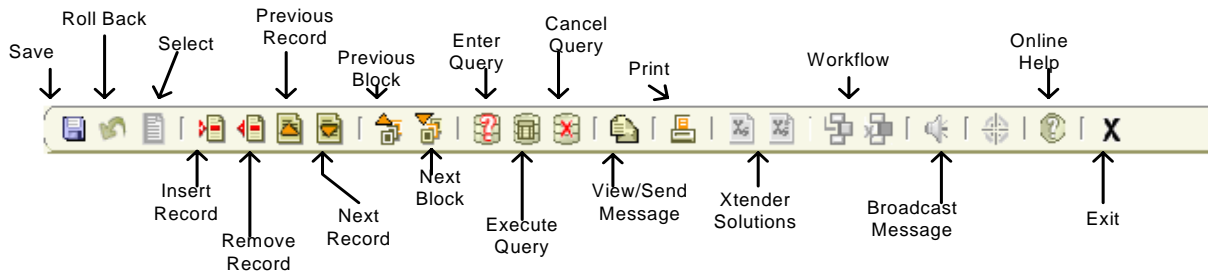
Form Organization:

Key Block- The top section of a Banner form is referred to as the key block. The “key” to a record is just like the tab on a file folder, enough information to locate the particular record you want to look at. The key will vary depending on the type of records being pulled up or entered, but often includes ID, Term and/or a sequence number.

Data Block(s) - Once information has been located based on the key the data block shows the information in a particular record. Forms may have one or more data blocks depending on how the information is stored or organized.

Maneuvering between/within Blocks- There are four ways to move from one block to the next.

- Click in a box in the data block area.
- Click on the Next Block button on the tool bar.
- Hold down the control key on the keyboard, and then hit the page down key.
- Choose Block off of the menu bar, then next.



Save: Stores all changes entered since last time changes were committed to the database.

Rollback: Clears all information on a form and moves the cursor to the Key Block.

Select: Selects an item from a “search results list” or a List of Values list (same as double clicking on an item).

Records: A record is stored information within a block. For some blocks there will only be one record. For others, there may be multiple records. The number of records available for the active block is shown on the status line.

Insert Record or **Delete Record** buttons on the toolbar are used to enter new records or remove existing records.

Previous Record or **Next Record** buttons on the toolbar are used to see the previous or next record.

Blocks: Information (data) is entered in areas (blocks). Blocks on the screen are separated by horizontal lines. The first (upper) block is the “**Key Block**,” which contains required information that affects the function of the rest of the form.

Next Block or **Previous Block** is used to navigate between blocks in a form.
Page Down is the comparable keystroke for Next Block and Page Up for Previous Block.

Queries:

Enter query puts the form in query mode so that you can enter search criteria. “Enter Query” appears in the status line (Some forms automatically open in query mode).

Execute query searches the database and displays records matching the search criteria.

Cancel query cancels a query and/or exits the query mode. (If the form is not in query mode, one click will exit the form).

Message: Not used at UNCG, since we have our own e-mail system.

Print: By clicking on the Print button you will create a print capture of the information currently displayed on your screen.

- Once you click the Print button, the Page Setup dialog box will open. To print to your default printer, using your default settings, just click OK.
- If you want to select a different printer, or change the default setting for your printer, click the Printer button that is visible toward the bottom of the Page Setup window.

Show Keys: Will show you a list of keyboard commands you can use to navigate through BANNER forms. While some of these may be consistent across all forms, other will be specific to the form currently displayed.

Control+F1 is the comparable keystroke.

Exit: The exit button will exit the current form and return to the previously viewed window (either the previous form, or the main menu screen). From the Main Menu screen, the exit button will exit the BANNER session.

Options Menu: When you are inside a form, click on the items under the pull-down Options Menu to go directly to other forms that are closely linked to the form you are accessing. These links vary from form to form and are a good place to look for related information.

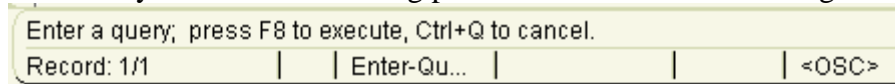
Elevators & Scroll Bars: Banner can store multiple records of the same kind, i.e. a student can have several addresses, but only one or two can be displayed on the screen at a time. When this occurs you may see an “elevator” at the right or left side of the screen. If there is a “car” in the elevator that means that you can use the up and down click buttons to see other records. Similarly if there is more information than can be displayed horizontally on a screen, then a “scroll bar” may be part of the form. Clicking left and right will scroll the display within the screen.

File: Under the “File” menu option, you will find up to 10 of the forms you most recently used, allowing you to bounce between commonly used forms.

Help:

Fields with Drop Down Boxes: Some field names in Banner have drop down arrows at the end of the field. By double clicking in the field the system gives you a list of possible values for a field on a screen. If you do not know the code to be entered, or if it is present and you do not know the translation, you can see all the possible choices.

Status Bar: Often hints will appear in the Status Bar on the bottom of your screen. If you seem to be having problems look there for messages that may help.



Help Menu: To see more about a particular data field, click in the field and pull down under the **Help Menu** Option to **Dynamic Help Query**. When you select that you will be presented with a small dialog box. Click **Display** to see a description of the field.

Non-Person Search:

If you do not know the vendor ID, then you can perform a name search. This is a Query form where you can enter what you know and have Banner search through all of the non-person records and present matches to select from.

Tab over to the Name field and enter the non-person name. Hit F8 to start your query. If you do not know how to spell the one of the names you can enter a percent sign (%) as a wildcard.
e.g. Dell%

Any records that matched your query will be returned.

Defined Keys

If you would rather use keyboard commands instead of the mouse and pull down menus you can find a list of Banner keyboard commands through the menu by pulling down on the Menu bar. The choices displayed may vary by screen and even within the screen depending on what block you are in.

Pull down to Help: Show Keys

Alt Key

By pressing the Alt key on your keyboard the Top Line menu in Banner is activated. By pressing Enter you can pull down the list of choices under File. By pressing the underlined letter in any of the menu options you can perform that function. Keystrokes are sequential not at the same time.

For example: Rollback would be Alt-F-R Exit would be Alt-F-X

This also works for items other than File. For example:Block Next would be Alt-B-N

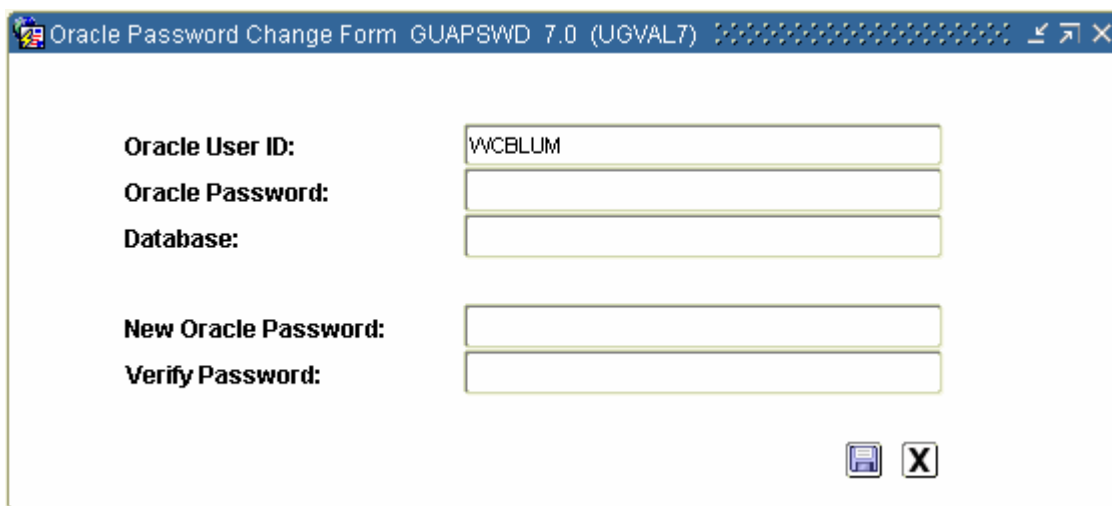
More Shortcuts:

<http://banner.uncg.edu/tips/keyboard.htm>

Password Changing:

To change your Banner (Oracle) password navigate to:

General: System Functions/Administration Menu: Menu/Preference Maintenance: Oracle Password Change Form (GUAPSWD)



Oracle Password Change Form GUAPSWD 7.0 (UGVAL7)

Oracle User ID:	<input type="text" value="WVCBLUM"/>
Oracle Password:	<input type="password"/>
Database:	<input type="text"/>
New Oracle Password:	<input type="password"/>
Verify Password:	<input type="password"/>

Enter in your current **Oracle Password**. (This is your Banner Login Password) What you type will appear as asterisks ***) Enter your **New Oracle Password**. (note Passwords should be a minimum of 8 characters, must contain a number but the number can not be

in the 1st position. Common words and the username are not acceptable as passwords. Passwords cannot be reused within 270 days.) Enter the same new Password in **Verify Password**.

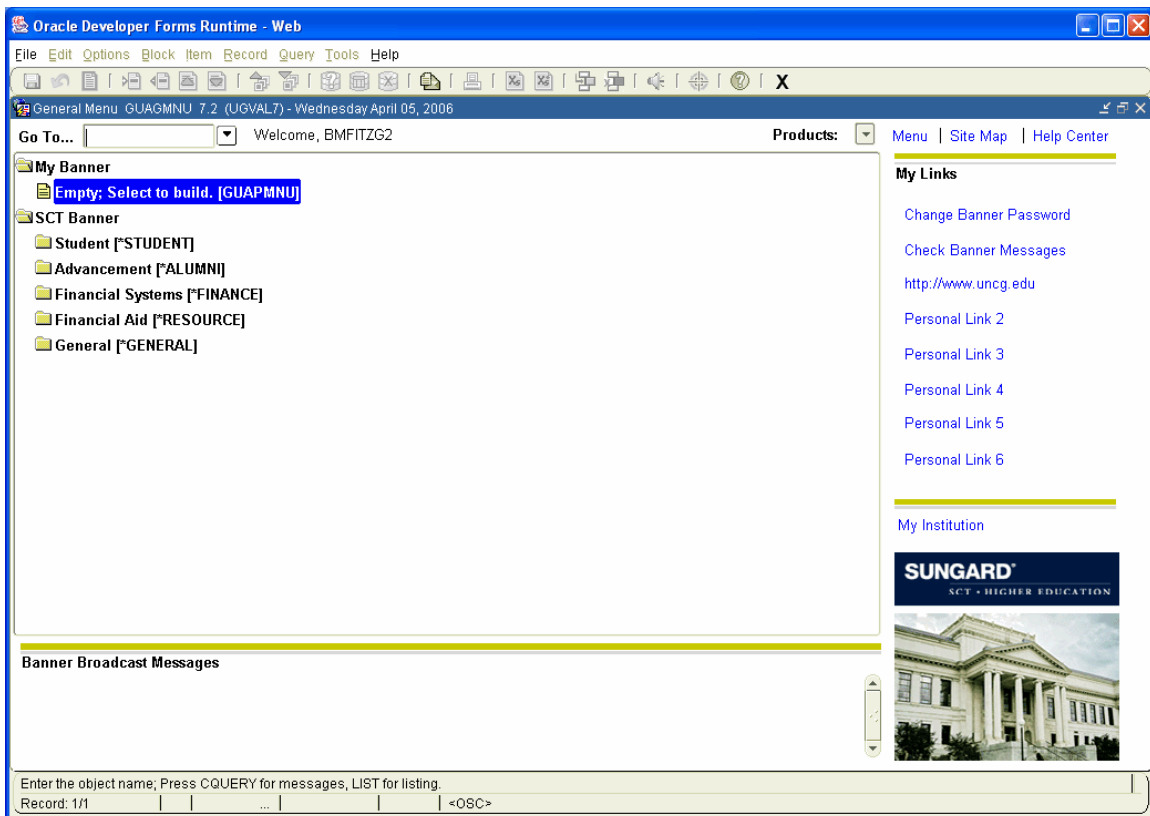
Click **Save**. You should get an alert box stating



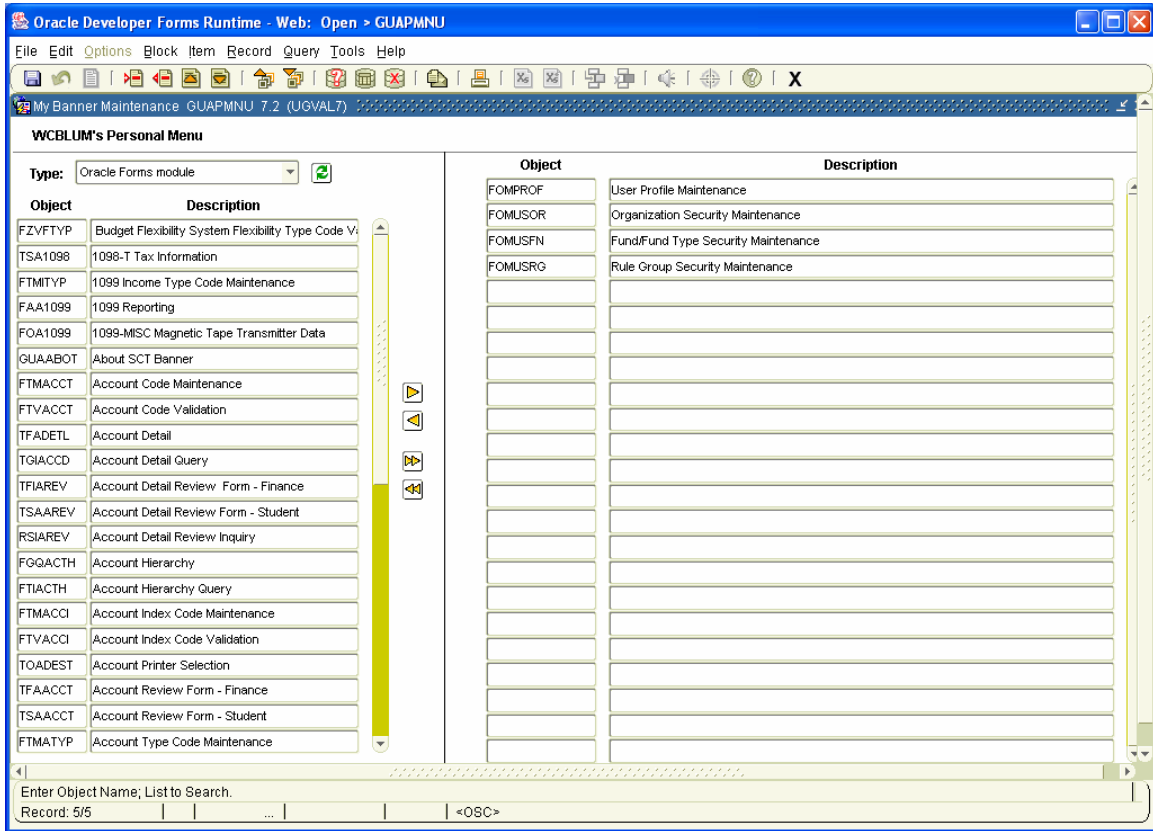
Personal Menus – My Banner

Within banner there are many hundreds of forms to choose from. As you use the system you will find that you will only need a handful of forms you use on a daily basis. The 'My Banner' menu option allows you to create a menu designed to fit your needs. To create your own personal menu, follow these steps.

When you first start to set up a menu, under the My Banner you will see an option that reads 'Empty; Select to build.' as shown below.



After choosing the 'Empty, select to build' option you will receive the following screen.



On the left side are all the Banner objects. You will notice that your cursor is blinking under the Object column on the right side of the screen. You should type in the seven character name of the form in the Object column, then tab to the Description column. When you hit the tab key, the description of the form will fill in.

Once you have typed in all the forms you want on your 'My Banner' menu, press the save button. You will need to log out and log back in to have it appear.