

Internet Native Banner

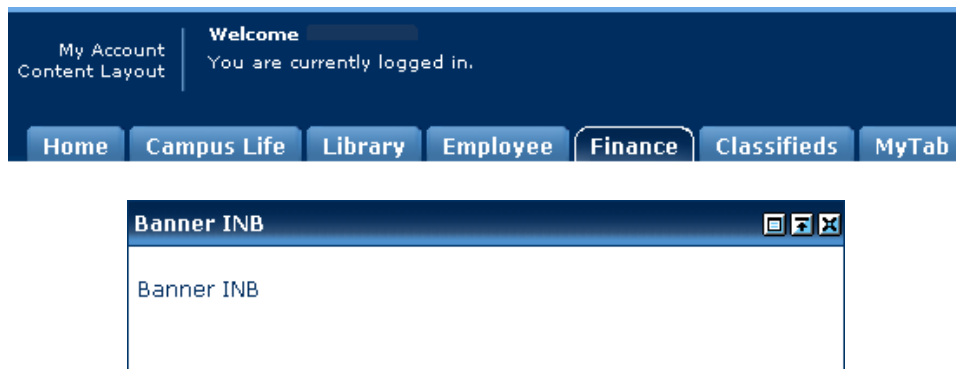
What is Internet Native Banner?

Internet Native Banner (INB) is a browser-based application, accessible using Internet Explorer.

To access Banner from off-campus, a VPN connection is required. Please contact ITS at 953-HELP (or helpdesk@citadel.edu) for technical assistance.

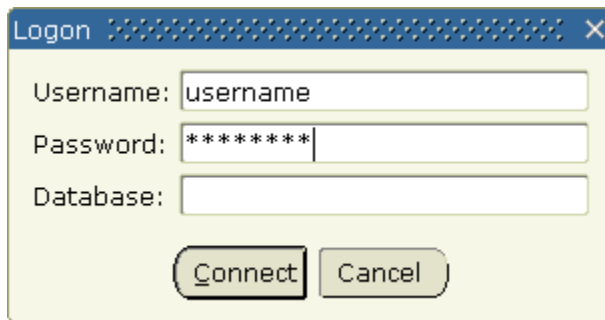
Logging into INB

1. INB can be accessed from the Finance Tab in Lesesne Gateway (<https://lesesnegateway.citadel.edu>)



Note: Banner will need to install a Java applet, "plug-in", the first time you access INB. If prompted, accept to install the Active X controls.

2. Enter your campus user name in the Username field.
3. Enter your Banner password in the Password field and click the Connect button.

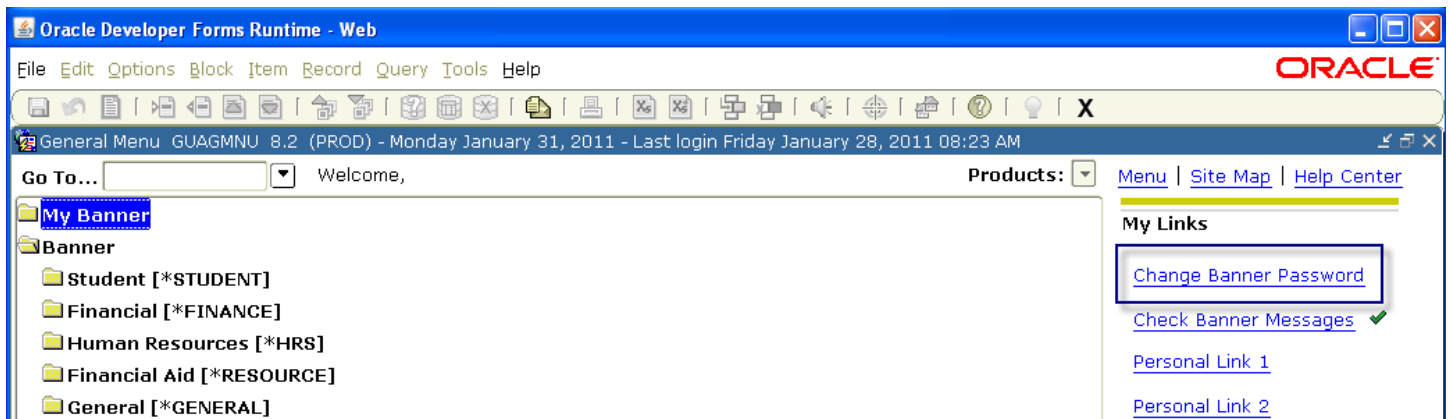


The image shows a screenshot of the Banner Logon dialog box. It has a title bar that says "Logon" and a close button (X). The dialog box contains three input fields: "Username:" with the text "username", "Password:" with the text "*****", and "Database:". Below the input fields are two buttons: "Connect" and "Cancel".

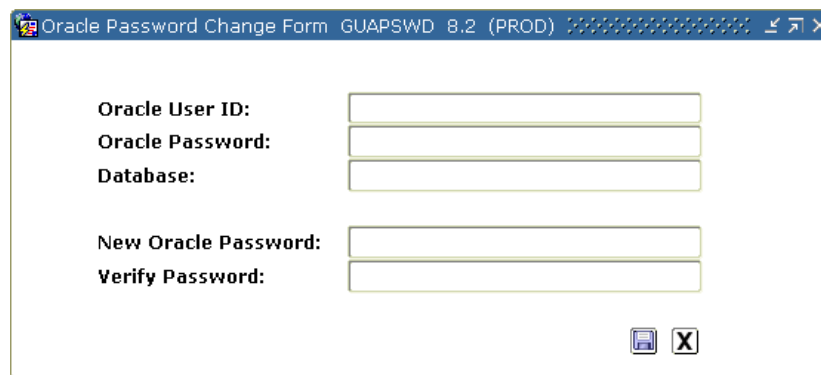
Note: If you do not know your Banner password, contact the Help Desk at 953-HELP.

Changing Banner Password

1. From the **Main Menu**, click the Change Banner Password link.



2. The **Oracle Password Change Form (GUAPSWD)** opens.

The screenshot shows the Oracle Password Change Form (GUAPSWD) window. The title bar reads "Oracle Password Change Form GUAPSWD 8.2 (PROD)". The form contains five text input fields arranged in two columns. The left column contains the labels "Oracle User ID:", "Oracle Password:", "Database:", "New Oracle Password:", and "Verify Password:". The right column contains five empty text input boxes corresponding to these labels. At the bottom right of the form, there are two icons: a floppy disk icon (Save) and a close icon (X).

3. In the **Oracle Password** field, type in your current password.

- The **Database** field is not used.

4. In the **New Oracle Password** field, enter your new password.

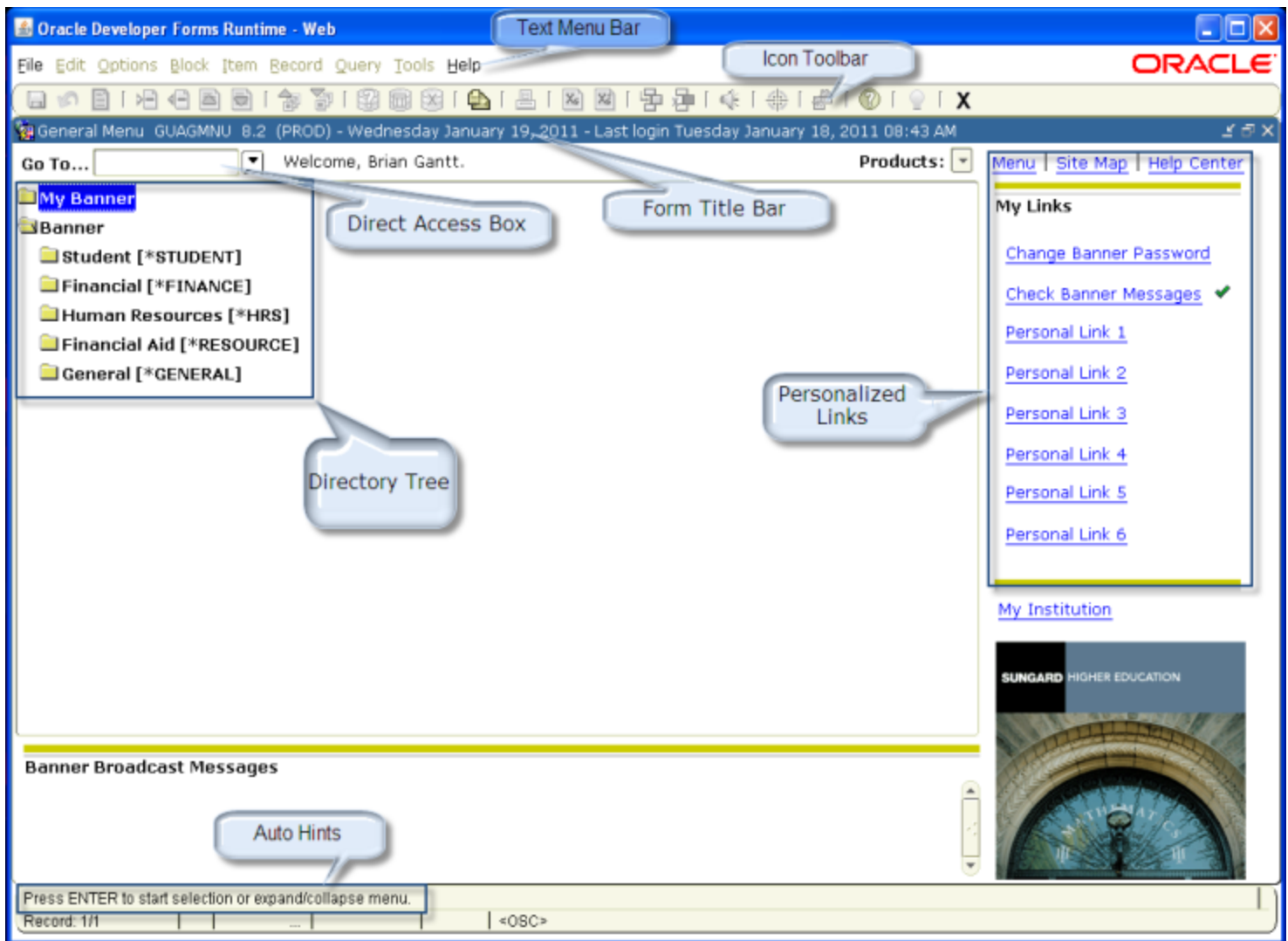
5. In the **Verify Password** field, re-enter your new password.

6. Click the **Save**  icon to save the new password and return to the Main Menu.

Banner Main Menu

Menus, forms, and modules are selected from the **General Menu (GUAGMNU)**.

1. From the General Menu screen, identify the various features by comparing your screen with the one shown below.



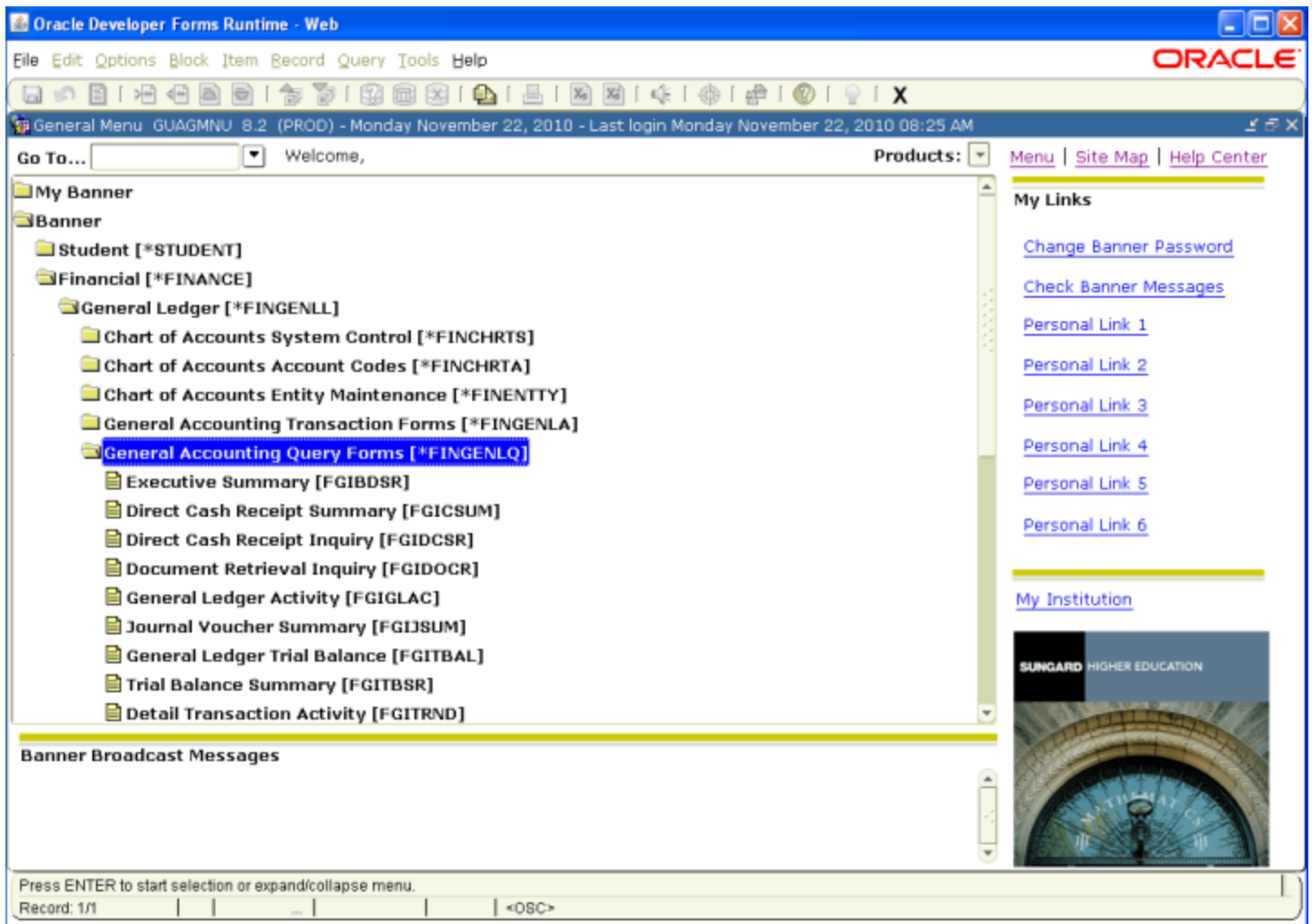
FEATURE	DESCRIPTION
Form Title Bar	Provides information about the active screen and window.
Text Menu Bar	Provides access to pull-down menus.
Icon Toolbar	Set of icons that represent shortcut functions available in the form. Icons grayed out are not available within the active form. The black X at the end of the Toolbar is used to exit the active form.
Directory Tree	Shows the hierarchy of forms available in Banner. Double clicking on each folder opens the folder to the next level.
Auto Hints	Provides information such as the current field the cursor is in, error and processing messages, how to access another window or form, next step, and field purpose. The record counter

	is also located in this section. The record counter shows which record is being viewed and how many records are available to view.
Personalized Links	Provides easy access to links used to change a Banner Password, check Banner Messages, and create customized links to other URLs.

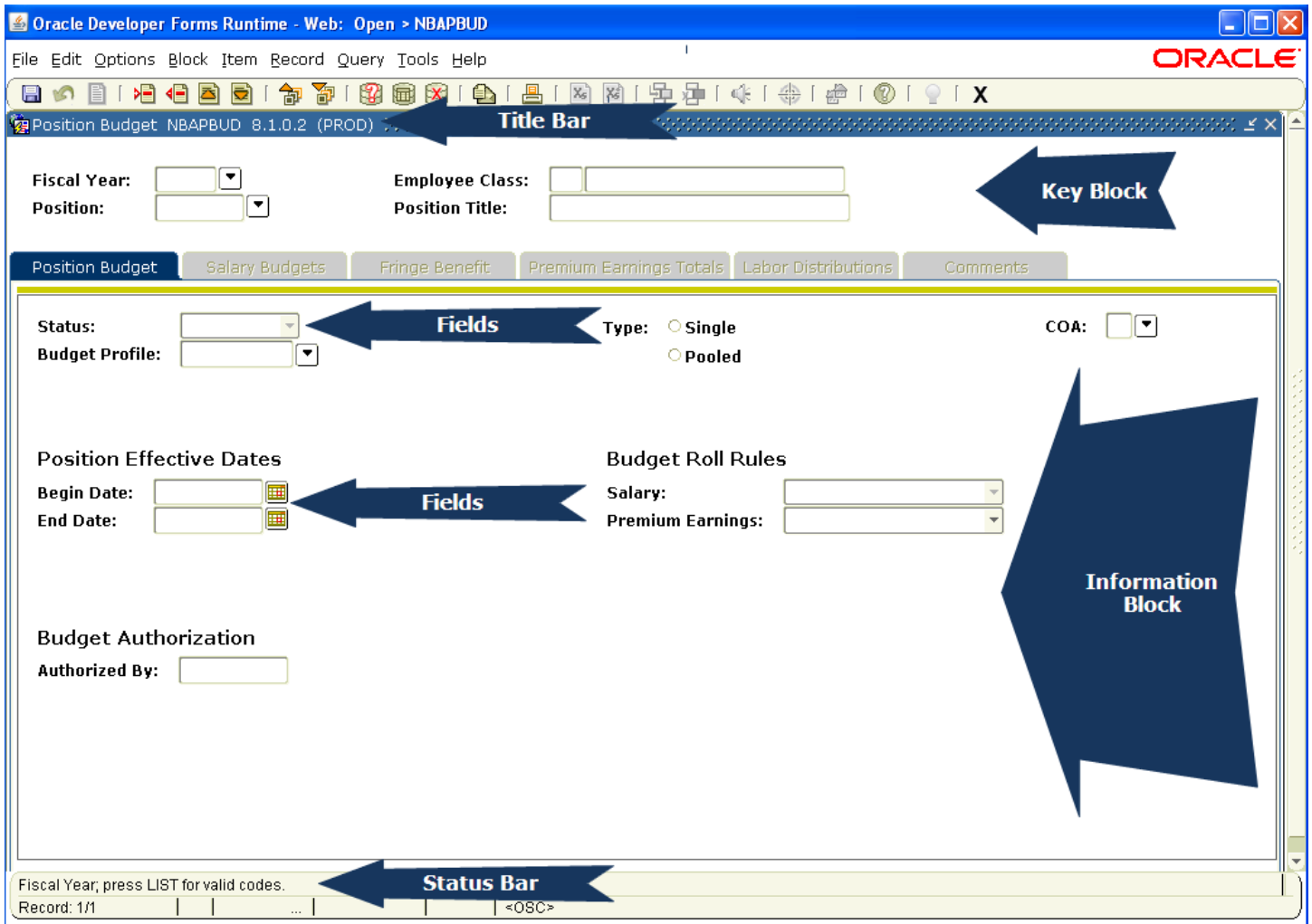
Banner Forms

A **Form** is the Oracle term for one or more connected screens; each form name is also referred to as an **object**. Banner forms are “online documents” used to enter and/or look up information.

The ability to view, access, and edit forms depends on the user’s security access level.



Inside a Form



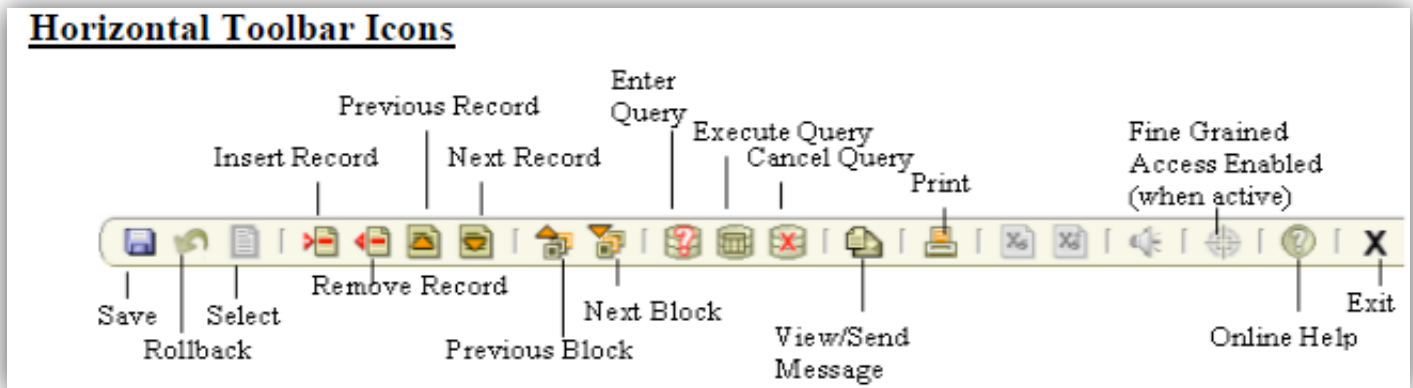
FEATURE	DESCRIPTION
Title Bar	A Title Bar displays the form name and description of the form.
Key Block	Data is entered in a key block to retrieve specific information.
Information Block	An Information Block displays the information the key block has requested. The type of information displayed is determined by the form used and relevant to which module is active.
Fields	A Field is a labeled space within a block. Information can be edited, queried, or displayed within a field. A drop-down or List of Values (LOV) can also be associated with fields.
Record(s)	Information grouped together is called a Record.







Navigating a Form

When a form is accessed, there are several icons and keys available for navigating in the form. The following keys on the Toolbar are used to navigate within a form.

Toolbar

Like standard application interfaces, INB uses *iconic* (picture) buttons on the Toolbar to perform common actions. A bubble describing the function appears if the cursor is "paused" over an icon – rest your cursor on each picture on the Toolbar, paying particular attention to the icons on the left half of the line.



KEY	FUNCTION
Next Block 	This key is used to move forward to the next block in a form. It is used to navigate from the Key Block to the Information Block and within sections (i.e. Tabs) of the Information Block. <i>This is the most commonly used key.</i>
Previous Block 	Moves back to the previous block of information and is used to move from the Information Block back to the Key Block to enter new search criteria.
Rollback 	Returns the emphasis to the Key Block and removes data displayed in the Information Block.
Enter Query 	Initiates the query function and allows search criteria to be entered.
Execute Query 	Performs the query search using the criteria entered.
Exit Query 	Clears the query and search results.

The Status Bar

The *Status Bar* at the bottom of each Banner form window reveals information on a pending function, indications of the data needed in a particular field, and any error messages.

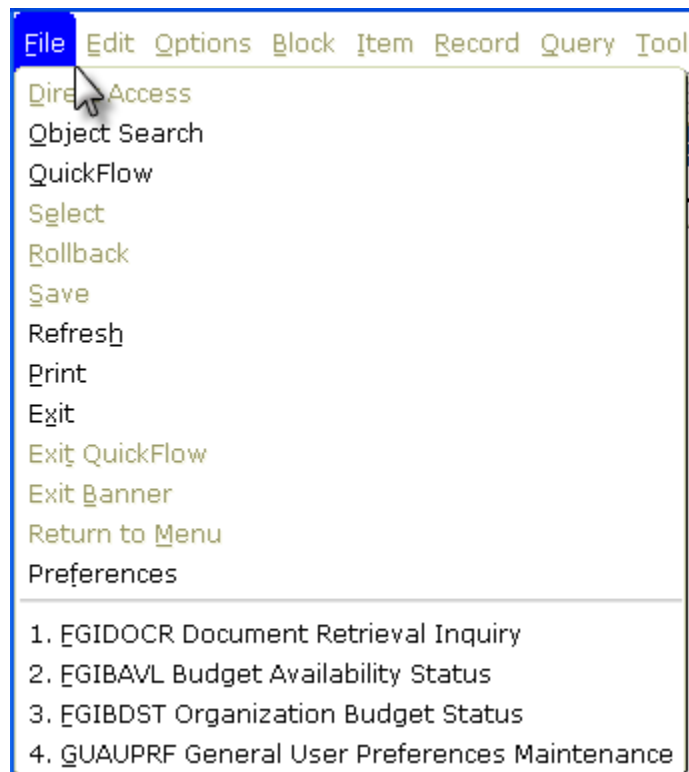
Account Index; Press LIST for valid codes.

Record: 1/1 | | ... | List of Valu... | | <OSC>

Menu Bars

A *Menu Bar* containing pull-down menus is located at the top of every form. For example, press the Alt key to reach the Menu Bar, or place your mouse over **File**.

1. Click on the File menu item, just as you would in any Windows environment.
2. Click the File menu again and select Exit to return to the General Menu.
3. The File Menu will also display up to 10 most recently viewed forms in the current session at the bottom of the File menu. This is an easy way to navigate back to a recently viewed form.

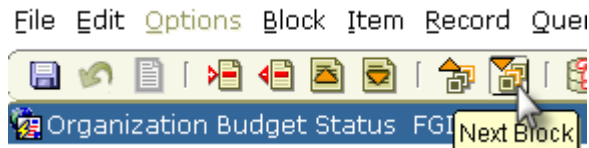


Blocks

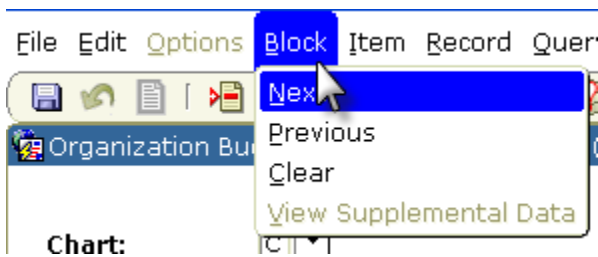
Banner forms contain one or more *blocks* – a block is a framed portion used for a specific function (also called a “window”). If a form contains more than one block, the top one is a **key block** that determines criteria for displaying and/or entering information related to this form.

There are multiple ways to navigate between blocks:

Click the *Next Block* icon on the Toolbar



Select Next from the *Block* pull-down menu



Simultaneously press the CTRL and Page-Down keys.

Different Ways of Accessing a Form

Using its Name:

You can reach the Organization Budget Status [FGIBDST] form by selecting it from the Banner -> Financial -> General Ledger -> General Accounting Query Forms -> General Budget Query Forms menu; or by selecting it from the File Menu's recently viewed forms listing; or you could also directly access that form by knowing its *object name*.

In the main GUAGMNU form click in the *Go To* field and key in the letters FGIBDST and press enter to access the form.

Go To... 

But I don't remember the name of the form!

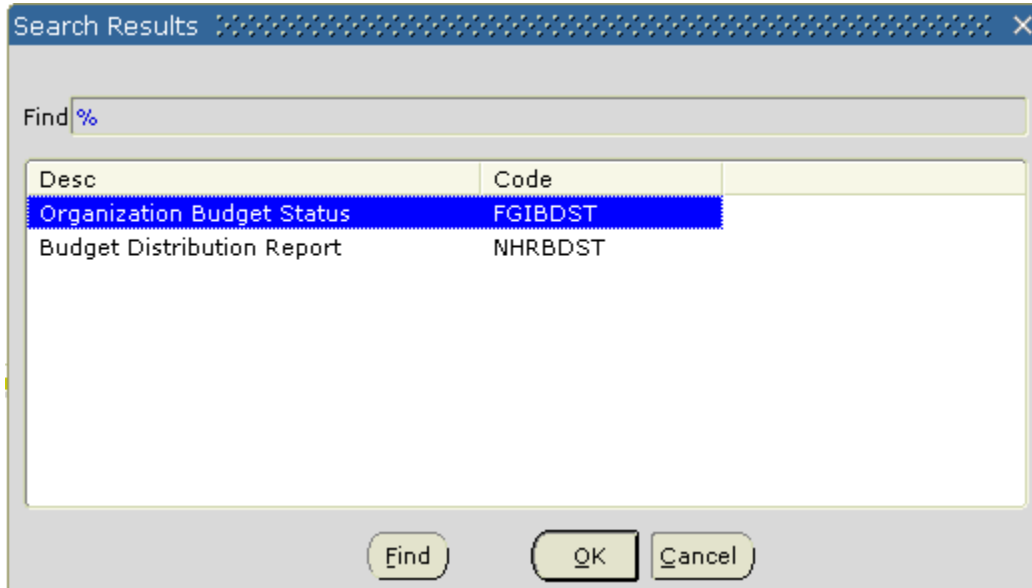
If you know any portion of the name or description you can still find that form using **Wildcard** capabilities.

With the cursor sitting in the Go To field:

1. Key in a % sign, then BDST and press.

Go To... 

2. A popup results window will come up showing all forms that end with "BDST". Typing the % sign at the end of a character string will search for forms that begin with that string.



3. Scroll down to find the form you want and then double-click to launch the form.

Wildcards in Banner

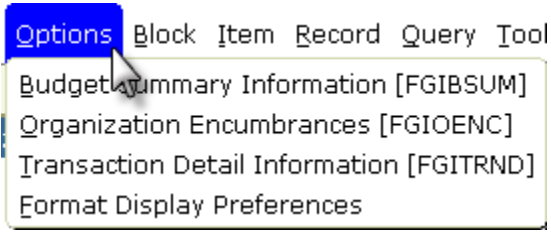
Two wildcard characters are used in Banner: the percent sign "%" and an underscore "_". Wildcards are used to fill in unknown characters in a form name or a search criterion. The search results returned depends on the number of items that satisfy the search criteria.

WILDCARD	FUNCTION
%	The percent sign wildcard is used when one or more consecutive characters are unknown. For example, when searching for a form, <i>FGI%</i> will result in a list of all forms that begin with the letters FGI such as FGIBAVL, FGIENCD, FGITRND, etc.
_	The underscore wildcard is used when a single character is unknown. For example, a search using <i>FGI_AVL</i> returns FGIBAVL (this is the only form that satisfies the search).

The Options Menu:

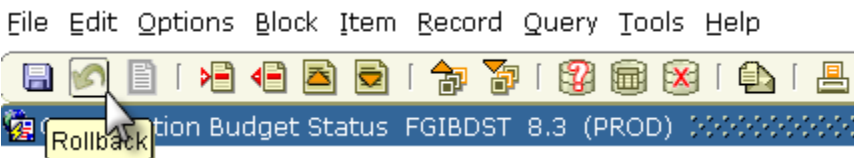
Allows short-cut navigation to related Banner forms and windows. Choices depend on the form and the block you are currently using – the list reflects other associated forms or blocks.

Can be activated by either clicking on the menu item or concurrently pressing the Alt key and the letter O (if the option wanted is the first one on the list starting with a specific letter, pressing that letter will activate the form or window). Items in the list not followed by an object name can also be reached via the tabs across the display.



There are two ways to return to the key block on a form from any associated block. Either:

- Use the Rollback icon on the Toolbar (this also “clears” the form)
- Press Shift-F7.



Customizing My Banner

The **My Banner** feature on the Banner Main Menu is used to “bookmark” frequently used Banner forms. Adding forms and/or queries to My Banner eliminates the need to navigate through menu paths to access frequently used forms. It also eliminates the need to memorize form names or keep a separate written list of frequently accessed forms.

Adding a Shortcut to My Banner

The easiest way to create a shortcut in INB is to do it from the actual form you want the shortcut for.

1. Open the form you plan on creating a shortcut for

2. **Right click** any portion of the form that is not an actual field and you will get a listing of options. Then **select** the option to **“Add to Personal Menu”**. The menu listing will disappear if chosen successfully.

File Edit Options Block Item Record Query Tools Help ORACLE

Organization Budget Status FGIBDST 8.3 (PROD)

Chart: C Organization: 20003 Accreditation
 Fiscal Year: 11 Fund: 110000 General Fund
 Index: 114120 Program: 40 Academic support
 Query Specific Account
 Include Revenue Accounts
 Commit Type: Both

Account Type	Title	Adjusted Budget	YTD Activity	Commitments	Available Balance
610100	L Salary - classified			0.00	0.00
620050	L Fringe benefits - pool			0.00	0.00
620150	L Year end payroll adjustmen			0.00	0.00
7100	E Supplies and Services			0.00	0.00
710950	E Dues and subscriptions			0.00	0.00
711500	E Maintenance contracts			0.00	0.00
7300	E Travel			0.00	0.00
Net Total:		-52,692.20	-27,908.00	14,182.65	

Context menu options: Rollback, Save, Exit, Print, **Add to Personal Menu**, Budget Summary Information [FGIBSUM], Organization Encumbrances [FGIOENC], Transaction Detail Information [FGITRND], Format Display Preferences

3. Do this for each form you want to have a shortcut.
4. In order for the shortcuts to show up in your My Banner folder, you must exit INB and then login again.
5. To see your shortcuts, expand the **My Banner** folder and your form shortcuts should now appear.

My Banner

- Journal Voucher Mass Entry [FGAJVCM]
- Journal Voucher Quick [FGAJVCQ]
- Budget Availability Status [FGIBAVL]
- Organization Budget Status [FGIBDST]
- Organization Budget Summary [FGIBSUM]
- Document Retrieval Inquiry [FGIDOCR]
- List of Suspended Journal Vouchers [FGIJVCD]
- General Ledger Trial Balance [FGITBAL]

How to Delete Shortcuts from your My Banner folder

Sometimes you may want to clean up your **My Banner** folder. Removing shortcuts is done via the GUAPMNU form.

1. Enter **GUAPMNU** in the **Go To field** and hit enter.

Organize My Banner [GUAPMNU]

My Banner Maintenance GUAPMNU 8.2 (PROD)

Personal Menu

Type: Oracle Forms module

Object	Description
PXA1099	1099-R
PTV1099	1099-R Distribution Code Validation
GUAABOT	About Banner
PTVRQST	Accommodation Request Status Validatio
PTVACST	Accommodation Status Validation
FTMACCT	Account Code Maintenance
FTVACCT	Account Code Validation
FGQACTH	Account Hierarchy
FTIACTH	Account Hierarchy Query
FTMACCI	Account Index Code Maintenance
FTVACCI	Account Index Code Validation
FTMATYP	Account Type Code Maintenance

Object	Description
FGAJVCB	Journal Voucher Mass Entry
FGAJVCQ	Journal Voucher Quick
FGIBAVL	Budget Availability Status
FGIBDST	Organization Budget Status
FGIBSUM	Organization Budget Summary
FGIDOCR	Document Retrieval Inquiry
FGIJVCD	List of Suspended Journal Vouchers
FGITBAL	General Ledger Trial Balance
FGITBSR	Trial Balance Summary
FGITRND	Detail Transaction Activity
FGRBDSC	Budget Status (Current Period)
NBAPBUD	Position Budget
NBAJOBS	Employee Jobs











All the shortcuts currently showing up in **My Banner** are listed on the right-side of the form.

2. To delete the form, find it on the list in the right-side and double-click on the form/object. Double-clicking is required to actually select the form – which will then change color (by default it should turn blue).
3. Click the left arrow in the middle of the page and you will notice your selected item disappear from the list on the right.
4. Save your changes by clicking on the Save button. Next time you login to INB forms/objects deleted will no longer show up in the My Banner folder.

Appendix A

Banner Function & Keystroke Table



FUNCTION	MENU OPTION	KEYSTROKE	TOOLBAR ICON
Record Functions			
Next Record	Record / Next	Down Arrow	
Previous Record	Record / Previous	Up Arrow	
Clear Record Delete Record	Record / Clear Records / Remove	Shift + F4	
Insert Record	Record / Next	F6	
Duplicate Record	Record / Duplicate	F4	None
Save Record	File / Save	F10	
Block Functions			
Next Block	Block / Next	Ctrl + Page Down	
Previous Block	Block / Previous	Ctrl + Page Up	
Roll Back	File / Rollback	Shift + F7	
Query Functions			
Enter Query	Query / Enter	F7	
Execute Query	Query / Execute	F8	
Cancel Query	Query / Cancel	Ctrl + q	
Count Query Hits	Query / Count Hits	Shift + F2	None
Miscellaneous			
Next Field	Field / Next	Tab	None
Previous Field	Field / Previous	Shift + Tab	None
Select	File / Select	Shift + F3	
Print	File / Print	Shift + F8	
Help	Help / Various Selections Available		
Scroll Up Scroll Down	None	Page Up Page Down	
Display Navigation Window-Go To:	None	F5	None
Show Keys	Help / Show Keys	Ctrl + F1	None
Exit	File / Exit	Ctrl + q	X

Banner Terminology

Specific terminology is associated with Banner and some terms may have a different meaning than what they have in other applications. Below is a list of commonly used Banner terms.

Block – A section of a form that contains a collection of related information. There are two (2) primary blocks in a form:

Key Block – Contains information that determines what is entered or displayed on the other parts of the form. This is also the block to start with each time a Banner form is opened.

Information Block – Displays the information based on the data entered in the Key Block. This block may consist of a single screen where all the information is displayed or it may have multiple screens accessed by tabs.

Form – An online document (also known as a screen or window). Information can be looked up in the database using a form. Forms in Banner have specific names that indicate which system and module the form belongs to, as well as the type of form, and the function of the form. There are four types of forms in Banner: Application, Maintenance, Query, and Inquiry.

List of Values-LOV(s) – A list of values is a predetermined value for specific fields located on the different forms. The list of values depends on which form is currently being used. A LOV is a list you can select values from; a value cannot be typed when a field has a LOV assigned to it.

Next Block – An icon on the toolbar that enables a user to move to the next block of the form. If the information block has tabs within it, the Next Block key can be used to move between tabs.

Previous Block – An icon on the toolbar that enables a user to move back to the previous block in the form. If the information block has tabs the Next Block function can be used to move between tabs.

Query – A query is the process used when searching for information. Using specific criteria narrows down the results when the query is executed.

Rollback – An icon on the toolbar that returns a user to the Key Block and clears the data from the form.