Banner 7 Navigation for New Banner Users
What’s Covered

- About Banner 7
- Banner Systems
- Accessing & Logging in to Banner
- Banner Forms - Naming Conventions
- Navigating in Banner 7
- Search Procedures
- Changing your Banner Password
- Where to find more information
About Banner 7

- Main administrative system
- Modules for Student, Alumni, Finance, and Financial Aid Information
- Module for limited HR information
- Integrated system—all information is shared between modules
  - Eliminates need to duplicate information as constituents move between areas of the University
- Data is stored on Forms within the system
FERPA

Family Educational Rights and Privacy Act

- a Federal law that protects the privacy of student education records. The law applies to all schools that receive funds under an applicable program of the U.S. Department of Education.

For more information, visit:
http://www.ccsu.edu/registrar/Policies/Policy_Page.htm
Banner Systems

• Banner Production – Internet Native Banner
  – Used mainly by administrative offices, academic secretaries, Deans and Department chairs

• WebCentral-Banner Web
  – Accessible via CentralPipeline
  – Used by students and faculty
  – To access CentralPipeline, visit https://pipeline.ccsu.edu

• Hyperion
  – Used for reporting
  – For more information on Hyperion, visit www.ccsu.edu/bannersupport.
About Banner 7
(Internet Native Banner)

• Web-based Application
  • Log in using a web browser
  • Browser versions recommended
    • Windows: IE 6x or IE 7x
    • Mac: OS X – Mozilla (Firefox)

• Need to install a Java Plug-in – only needs to be installed once per computer

• Available from off campus using VPN (Virtual Private Network) connection or the Remote Application Server (Citrix)
Accessing & Logging in to Banner

- Open your web browser
- Navigate to http://www.ccsu.edu/banner
- If necessary, the plug-in installation will begin automatically
  - Once finished you will be brought to the login screen
- Two browser windows are needed to run Banner
- Banner username is your BlueNet Account username, initial password is provided, but you must change it.
- Database is cprod
Banner Naming Conventions

- All data stored on forms
- Forms all have 7-character names (i.e. SPAIDEN)
  - First character describes system:
    - S - Student
    - F – Finance
    - R – Financial Aid
    - A – Alumni
    - P – Human Resources
- Application forms are the most common forms
- Query forms allow you to search for information
- More information can be found on the Banner Support web page
Navigating to Forms

- **Main Menu**
  - Lists all modules of Banner; lists only forms a user has access to

- **My Banner**
  - List of frequently used components set up by the user
  - To add forms: right-click the form, then click “Add to Personal Menu” or go to GUAPMNU

- **My Links**
  - Quick links to forms or web addresses set up by the user

- **“Go to” field**
  - Use 7-character form name to go directly to a form
  - When on a form, use F5 to access “Go to”
Components of Forms

- **Title Bar** – name of form you are on
- **Key Block** – first block on most forms
  - Contains key information (i.e. ID Number or Name)
  - Determines what is displayed on form
- **Block** – section of a form that contains related information
  - Forms can have several blocks
  - Some forms have tabs going across the top to represent the blocks
- **Fields** – space containing individual pieces of information
- **Options menu** – list of options for a form
  - Options can bring you to other blocks on the form or to different forms with related information
Navigating in Forms

• Navigating Blocks
  – Next Block/Previous Block – moves cursor into next or previous block of form
  – F2 Key – lists blocks on tabbed forms
  – Right-click – lists blocks and other shortcuts

• Rollback – returns cursor to Key Block

• Searchable fields:
  – List of Values (LOV) fields – opens a separate box to look up a value for the field
    • Double-click the field or click on the down-arrow button to open LOV
  – Search fields – query information from another form (down arrow next to field)

• Exit form – use the Exit (white X) icon to exit forms and return to the main menu

Query Forms

- Used to search for information
- Usually do not have a Key Block
- Enter search criteria in fields, then perform an Execute Query function
  - Use Query menu/Execute
  - Use F8 key on keyboard
- Examples of Query forms:
  - SSASECQ – Schedule Section Query form
  - GUIALTI – Alternate Identification Search form
Banner Search Procedures

• If creating new records, must use Search to avoid duplicate records

• Can search on any form that has ID and Name fields in Key Block or search forms:
  – GUIALTI or SOAIDEN

• Search for people using Name or ID, primary search is by ID (ID is 8-digits)
  – Tab over to Name field to search by name

• Banner Search Guide:
Searching on Partial ID or Name

- Use wildcard for part of ID or name you don’t know
  - % is used for any number of characters
  - Examples:
    - 3012% returns all records where the ID number starts with 3012
    - St%rt returns all records where st are the first characters and rt are the last (examples: stewart, stuart, stoddart), there could be any number of characters in between

- Search Results
  - Single match is automatically entered in field
  - Multiple matches – extended search window
Extended Search Window

- Shown when there are multiple matches for search criteria
- Use to narrow down results using various fields:
  - Person/Non-Person
  - City
  - State
  - Gender
- Click on drop-down to select a person or click on red “No” symbol icon to exit
Changing Your Banner Password

• From the Main Menu, click on the Change Banner Password link
  – Enter your current password
  – Enter your new password (twice) and click OK

• Banner passwords must be at least 7 characters; they must contain letters and numbers, and are case-sensitive.

• Banner passwords expire every 60 days.

• For more information about Banner passwords, visit: www.ccsu.edu/bannersupport
For Assistance with Banner
IT Help Desk
x2-1720
techsupport@ccsu.edu

Tina Rivera
Software Support & Training Specialist
riverat@ccsu.edu
X2-1789

Banner Support Page: www.ccsu.edu/bannersupport
Banner Training: www.ccsu.edu/cutt