

# Banner Basics

Basic Navigation  
Using INB  
With The APASBIO Form



# Banner Basics



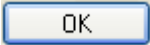
## Basic Navigation Using INB With The APASBIO Form

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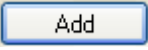
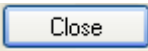
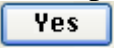
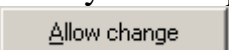
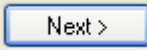
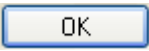
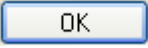


# Optimal Configurations To Run INB

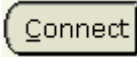
1. Start Internet Explorer (or your favorite browser).
2. You can navigate to Internet Native Banner by one of two methods:
  - Type the address into your browser:
    - a. In the **Address** field of your browser, type **go/inb**.
    - b. Press  or .
  - Follow links from the Middlebury College home page:
    - a. On the Middlebury College home page, click **Library & Information Services** at the bottom of the page.
    - b. On the Library and Information Services page, click **Banner, INB, Hyperion, FAMIS** under the **Quick Links** heading.
    - c. Click **Internet Native Banner – INB**.
3. The gateway page to INB opens. Create a Favorite for this page by doing the following:
  - a. From the **Favorites** menu, select **Add to Favorites**. The **Add Favorite** dialog box opens.
  - b. Navigate to where you want to store this link.
  - c. Click .
4. Click on the link for the database you want to use. **Production** is the most common choice as it contains our live data.

**Note:** If you have a pop-up blocker installed on your computer, you should disable it for this site before clicking the link to the desired database. To do this:

  - a. In IE, on the **Tools** menu, point to **Pop-up Blocker**, and then click **Pop-up Blocker Settings** on the submenu. The **Pop-up Blocker Settings** dialog box opens.

- b. In the **Address of Web site to allow** field, type **jade.middlebury.edu**.
  - c. Click .
  - d. Click .
5. If you have never run INB before, you must install **Oracle JInitiator** now. The procedure is:
  - a. A **Security Warning** window opens which asks if you want to install **Oracle JInitiator**. Click .
  - b. The installation process begins and some progress windows display. **Note:** If you have Spybot installed on your computer a Spybot – Search & Destroy window displays. Click .
  - c. When the **Choose Location** dialog box opens, click .
  - d. When the installation completes, a pop-up window notifies you. Click . INB starts and presents the logon dialog box.
6. If you get bumped out of Banner when you go to another web link, do this:
  - a. Open a new Internet Explorer window.
  - b. From the **Tools** menu, select **Internet Options**.
  - c. Click the **Advanced** tab.
  - d. Under Browsing, deselect the option that reads **Reuse windows for launching shortcuts** (the 17<sup>th</sup> option down).
  - e. Click .

## Logging Into INB After The First Time

1. Start your browser.
2. On the **Favorites** menu, click the Favorite for INB that you previously created.
3. The gateway to INB page opens. Click the link to the database that you want to use.
4. In the **Username** field, type your **username**.
5. In the **Password** field, type your **password**. Leave the **Database** field blank.
6. Click .



Logon

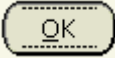
Username: knutson

Password: \*\*\*\*\*

Database: [REDACTED]

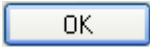
Connect Cancel

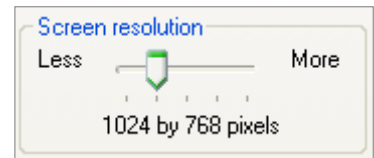
- If your logon is correct, INB starts and the Banner General Menu (GUAGMNU form) displays.
- If your login is incorrect, the error message **ORA-1017: invalid username/password; logon denied** displays.

Click  and you will be given another chance to login.

# Change Screen Resolutions In Any Version Of Windows



Banner 7 runs in a screen resolution of 1024x768, allowing ample room to display user interface components. If the Banner screen does not fit inside your Windows screen, you may need to change your screen resolution.


1. Right-click on a blank area of your **Desktop**, and select **Properties** from the pop-up list.
2. On the **Properties** dialog box, click the **Settings** tab.
3. Under **Screen resolution**, drag the slider to the right until it says 1024 by 768 pixels, as shown at right.
4. Click .






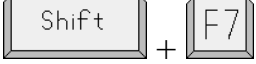

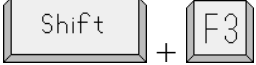



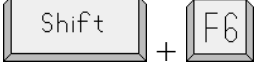





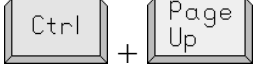

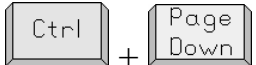





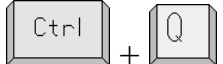




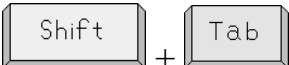
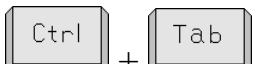
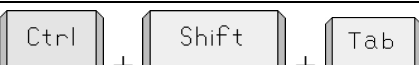
## Your Internet Native Banner Session

After you log into Internet Native Banner, there will be two buttons on your taskbar associated with your INB computing session:

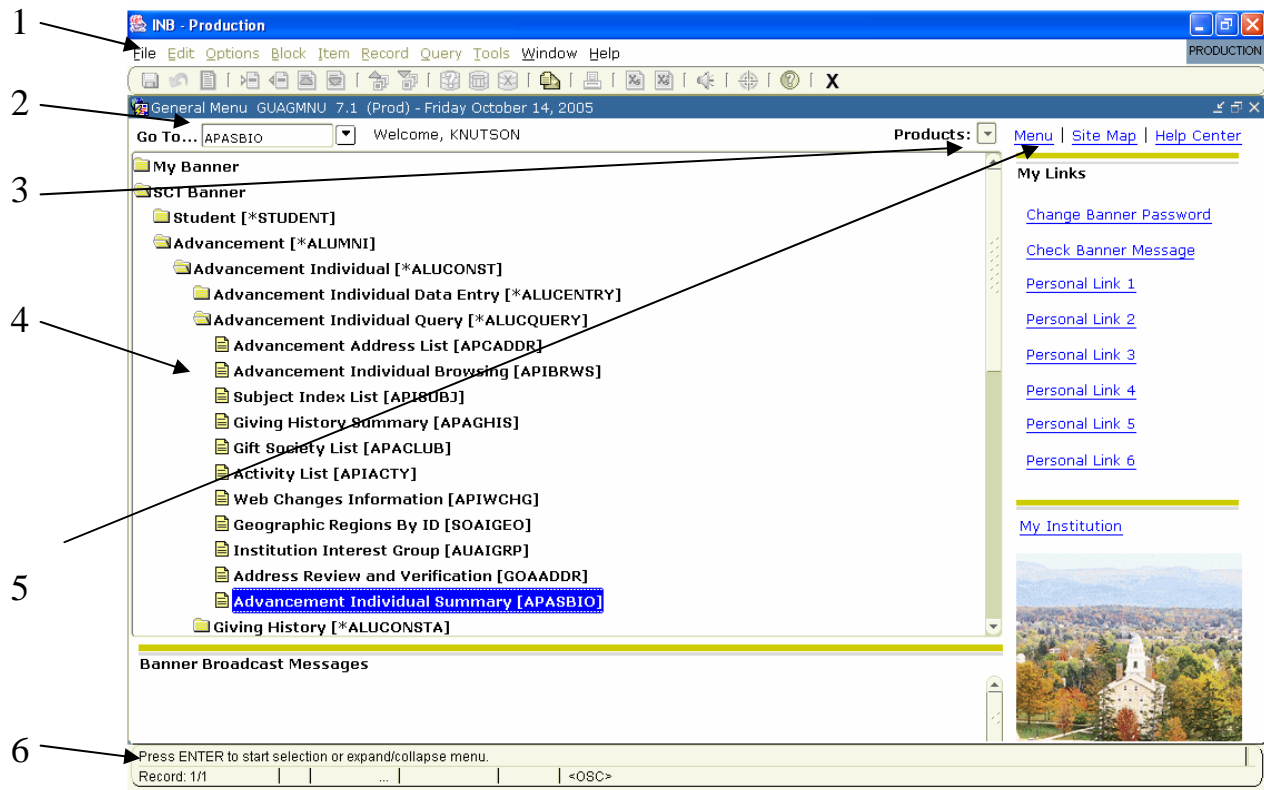
-  Middlebury Colle... - The window associated with this button **MUST REMAIN OPEN** while you are running INB in a second window.
-  INB - Production - The window associated with this button is the one on which you will interact with INB. It displays the Banner forms you request. The database name appears in the title bar of any Banner form you open.






**Note:** On the General Menu (GUAGMNU form), the **My Institution** link allows you to open another Internet Explorer window. You also see this link if you press  while in any Banner form.

## Tool Bar Buttons And Key Stroke Shortcuts

Tool Bar Button	Function	Key Stroke Shortcut
	Save	
	Rollback	
	Select	
	Insert Record	
	Remove Record	
	Previous Record	
	Next Record	
	Previous Block	
	Next Block	
	Enter Query	
	Execute Query	
	Cancel Query	
	On-Line Help	
	Exit	
	Next Field	
	Previous Field	
	Next Tab	
	Previous Tab	

# Banner General Menu




1. **Banner Menu Bar** with drop-down menus.
2. **Go To** gives access to a form by entering the Banner form name or QuickFlow name. While your cursor is in the **Go To** field, you can use  or  to scroll through recently used forms.
3. **Products** drop-down gives you quick access to the Banner modules and associated menus. Point at the , then press and hold the mouse button to see the module list. Drag to your selection and then release the mouse button.
4. **Banner General Menu** lets you navigate through the folder structure to submenus and forms.
  - To **expand** or **collapse** a menu, double-click  (Folder icon).
  - To open a form, double-click the form name in the menu which will be preceded by  (Form icon).

- To quickly **return** to a main menu, select the desired module from the **Products** drop-down.
5. The **Links** frame displays the links described below:
- [Menu](#) refreshes the **General Menu**, reflecting any changes made.
  - [Site Map](#) is a navigation aid. Double-click anything on the lists to open the desired folders in the given module.
  - [Help Center](#) opens a separate browser window showing SCT Banner Help Center topics. Click links to learn about Banner topics.
  - In the **My Links** section Banner provides you with 6 customizable links which you may configure to open web sites, forms, or Quickflows of your choosing.
6. The **Auto Help Line** displays a status line with error messages or important information about your next step.

# Navigating To Advancement Individual Summary Form (APASBIO)

You can view basic name and address information about people using the Banner Advancement Individual Summary (APASBIO).

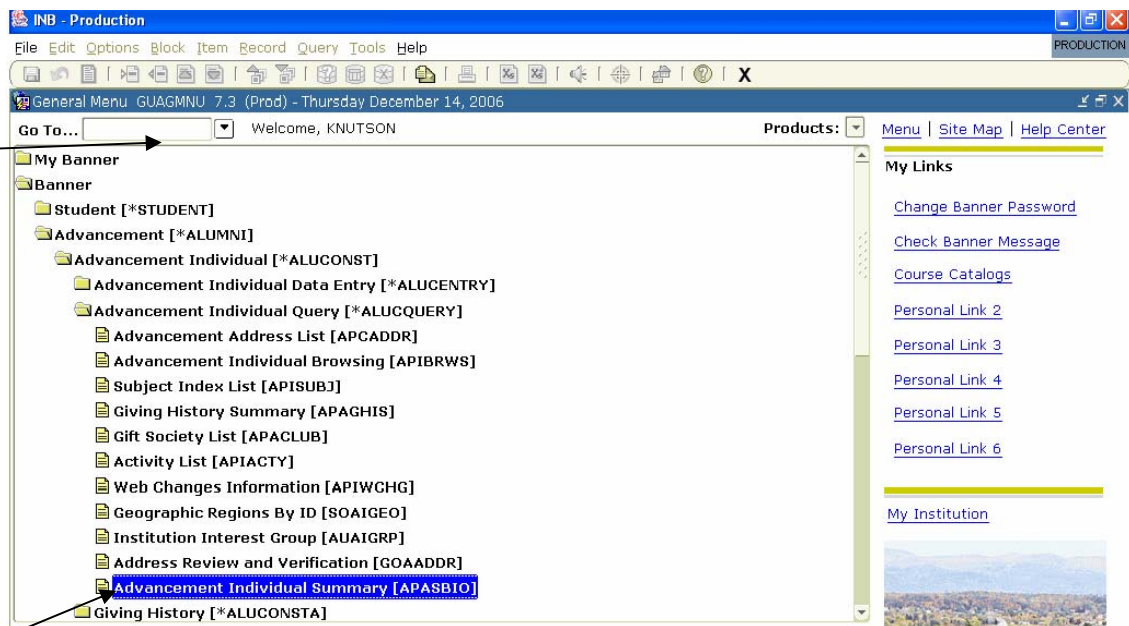
1. Start your browser, and click your Favorite to the INB gateway page as described in previous sections.
2. Select the database you want to use and login (again, as described in previous sections).
3. When the general menu (GUAGMNU) appears, open the **APASBIO** form.
  - **Go To** method:
    - a. Type **APASBIO** in the **Go To** field.
    - b. Press ; the **APASBIO** form appears.
  - **Menu Navigation** method – double-click the following items to open them:
    - a. **Banner**
    - b. **Advancement**
    - c. **Advancement Individual**
    - d. **Advancement Individual Query**
    - e. **Advancement Individual Summary [APASBIO]**

The key block of the **APASBIO** form displays.

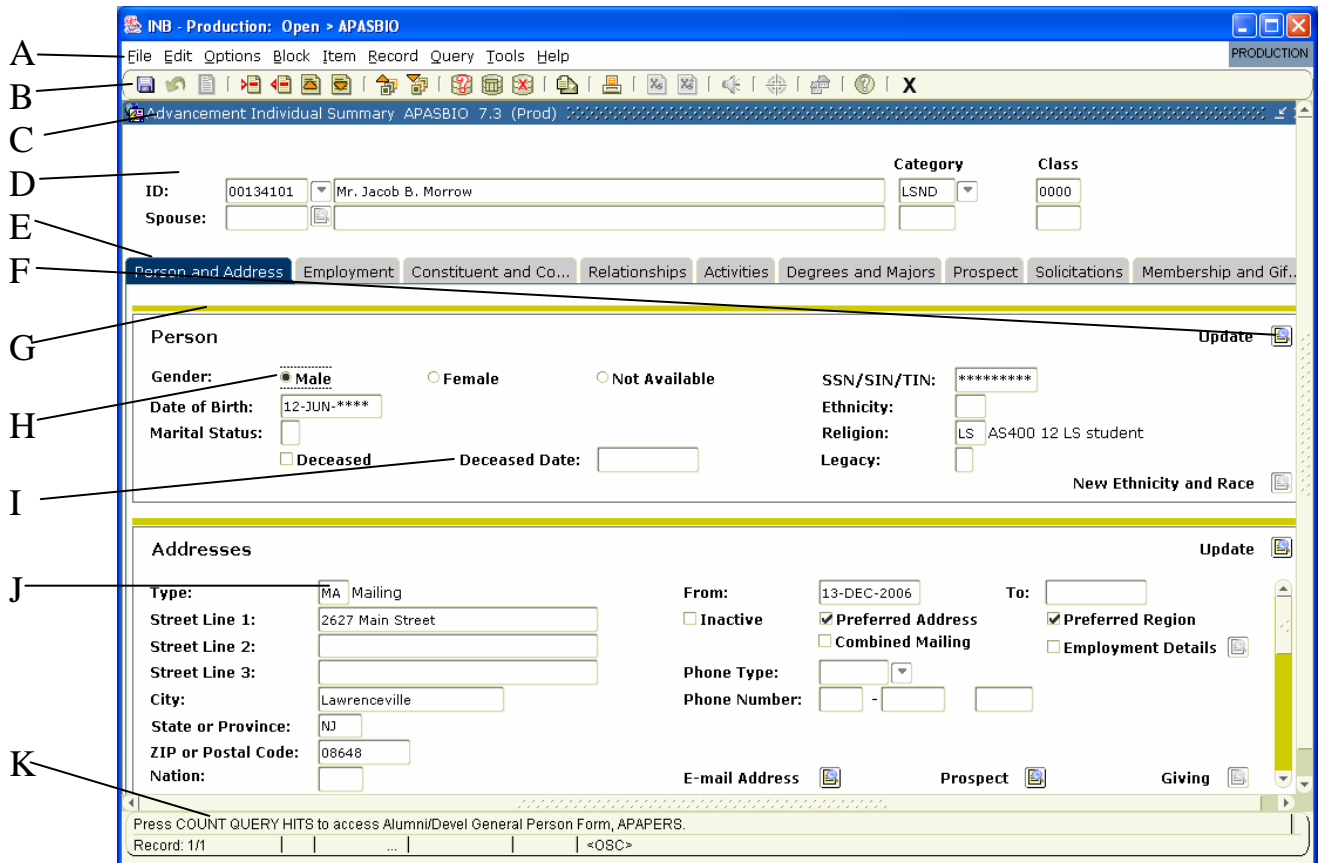
**Go To** method, type form name in the **Go To** field then press


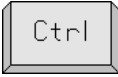













**Menu Navigation** method, open menus and double-click **Advancement Individual Summary APASBIO**.



# Parts Of Banner Forms



- A. **Menu Bar** – Displays the pull-down menus available to you. The **Options** menu is important to you. It allows you to go to other blocks of the current form or open other useful, related forms. Pay attention to where you are and remember that all forms remain open until you close them.
- B. **Toolbar** – Toolbar buttons are briefly explained in the *Toolbar Buttons And Key Stroke Shortcuts* section.
- C. **Form Title Bar** – Displays the form description, the Banner form name, the Banner release number, and the database you are using.
- D. **Key Block Area** – The first block of a form. Contains identification information related to the form’s function. It allows you to search for the unique identifier of the record you want to view. Click  (Next Block) or press  +  to move to the next block. A form may have several blocks. Click  (Next Block) or press  +  until no more blocks are presented.





- E. **Tabs** – Some Banner forms have a tabbed interface with titles that reflect the contents of a particular window or grouping of information. Tabs are used to arrange information in a meaningful way, and allow you to navigate easily between blocks of information. Navigation with tabs is done in several ways:
- Click on the tab to move to another block in the current form.
  - Use  + , or  +  +  to navigate through information grouped on tabs.
  -  calls up a list of all available tabs.
- F. **Iconic Buttons** – These buttons are small squares that contain an icon (picture). They represent one or more actions that can be performed for the associated field or record, such as searching for a person or displaying additional details. Point to a button with your mouse; a tool tip will give a brief description of its function.
-  - The **Search** button displays another form or window where you can search for a value or information related to the field. You can often select a value by double-clicking it, returning it to the associated field.
- G. **Block Line** – Indicates the block boundaries.
- H. **Active Field** – Denoted by a blinking cursor, highlighted field or a field and label outlined with dots to draw your attention to it. Note the example on the previous page shows the dotted outline above and below the male gender radio button and label. You may find this easier to see on your screen.
- I. **Field Label** – The Field Label is usually adjacent to the Field and is descriptive of the Field contents. Some Field Labels appear above a column.
- J. **Field** – Fields contain data and display existing data values. Users can enter, query or change field contents when a field is enabled.
- K. **The Auto Help Line** – Status line at the bottom of *every* Banner screen that displays error messages or important information about your next step.

**Remember your best Banner friend, the  
Auto Help Line!**










# Navigating Forms

There are a variety of navigation methods in Banner. Brief descriptions of these methods follow.

## 1. Toolbar Buttons

-  (Next Block) moves to the next informational block on your form.
-  (Previous Block) moves to the previous informational block on your form.
-  (Rollback) returns to the Key Block of the current form.
-  (Exit) exits the current form.

## 2. Keyboard Shortcuts

-  +  moves to the next block on your form (like ).
-  +  moves to the previous block on your form (like ).
-  moves your cursor to the next field.
-  calls up the **Go To** field and allows you to type in a form name. It also provides a link to the Middlebury site that opens in its own window.
-  calls up a list of the tabs on the current form.

## 3. Tabs

- Click tabs to move to other groups of information on the current form. Each tab may have more than one block within the screen.

#### 4. Menus

- **File** menu – provides quick access to recently used forms that appear in a numbered list at the bottom of the menu. You can also select **Return to Menu** on the **File** menu which closes all open forms and returns to the **General Menu GUAGMNU** or choose **Exit Banner** from the **File** menu to close all forms and end your Banner session.
- **Options** menu – allows access to various blocks of the current form, and access to other related forms.

#### 5. Mouse

- Right-click a blank area on your form. The pop-up list gives access to blocks of current forms and to related forms.

## Using Advancement Individual Summary Form APASBIO

You can use the form **Advancement Individual Summary APASBIO** to:



- View name, address, and telephone information for Middlebury-affiliated people (constituents) including students, faculty, staff, and alums.
- Perform person searches that look *only* in the constituent group (instead of including vendors and inquirers).
- View or search by alternate names, such as maiden names and nicknames.

### Viewing Constituent Information





1. Open the **APASBIO** form using the instructions in the section *Navigating To Advancement Individual Summary Form (APASBIO)*. **APASBIO** opens with your cursor in the **ID** field.


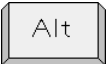

2. Search for the person in one of three ways:

**Method A**, used when you know the **ID** number of the person:




- a. In the **ID** field, enter the eight-digit ID number of the person.
- b. Press  or . If the ID number is valid, the **APASBIO Key Block** is populated with information.

**Method B**, used when you do not know the **ID** number of the person:




- a. Leave the **ID** field blank, or delete any existing ID number. Press ; your cursor moves to the blank name field.
- b. In the name field (the large, unlabeled field to the right of the **ID** field), type all or part of the person's last name, followed by a comma, then at least a portion of the first name. Use the % wildcard to complete any partial name entries. You may use more than one % wildcard.  
**Note:** Searches using this field are not case sensitive (you may use **slater**, **c%** to search for Slater, Cynthia.)
- c. Press  or .
  - If the last name is unique, the **APASBIO Key Block** is populated with information.
  - If the name is not unique, the **ID and Name Extended Search APASBIO** form opens. The number of names found is displayed to the right of the **Search Results** drop-down list. There are two methods of reviewing the information found:
    - Click  next to **Person Search Detail**. The **Advancement Individual Search AOAI DEN** form opens. You can review gender, class, and address information to insure the correct selection. Double-click on the desired name to bring the person's information back to APASBIO.

- o Click  or press  +  to see the name and ID information in the **Search Results** drop-down list. Click on the desired name to bring the person's information back to APASBIO. Review the category and class information displayed in the Key block to be sure you have the correct person.

**Method C**, alternate method if the ID number is unknown:

- a. Click  after the **ID** field. The **Option List** window appears.
- b. Click on **Constituent Search (AOAIDEN)**. The form opens in query mode.
- c. In the **Last Name** field, type the last name of the person.
- d. If the surname is a common one, in the **First Name** field, type at least part of the first name followed by a %.
- e. Click  (Execute Query) or press . AOAIDEN is populated with all matches.
- f. Double-click anywhere on the record of the person for whom you want to view information. You are returned to APASBIO and the Key Block is populated with information on the chosen person.

3. View more information about the constituent.

- Click  (Next Block) or press  +  to see additional blocks of information.
- Click a tab to move to related groups of information.
- From the **Options** menu on the menu bar, select the name of the block or form desired.
- Right-click on a blank area of the form for a pop-up list of blocks.

# Developing Your Own Personal Banner Menu Using The GUAPMNU Form

1. Open the **GUAPMNU** form as follows:


- In the **Go To** field, type **GUAPMNU** and press .

Or

- From the **My Banner** menu, double-click **Organize My Banner [GUAPMNU]**.

**My Banner Maintenance GUAPMNU** opens (see the illustration on the next page).







2. Use one of two methods to add items to your personal menu:

- Supply the name as follows:
  - a. Click in the right-side frame, in the **Object** column, just below the last item on your menu.  
**Tip:** To position a menu item in the list, click once on the item name or description above the desired location, then click  (Insert Record). A new row will appear.
  - b. Type the name of the form you want to add; form names are always seven characters, such as **APASBIO**.

- c. Press .

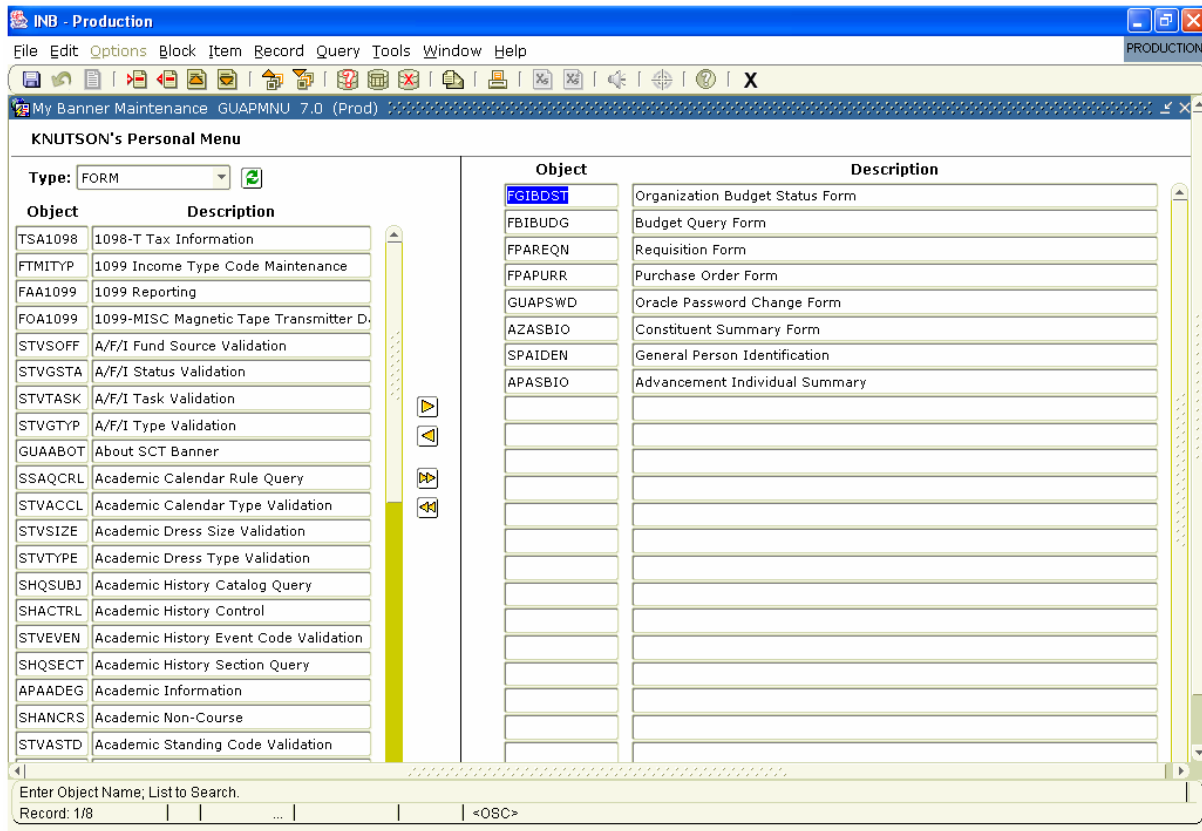
- d. Press  to add another form.

- Item selection from the pane on the left:
  - a. First, click once on the Object name or Description to determine the position of your new item in the pane on the right. The new item will be added below your selection.

- b. Use the pull-down menu above the left pane to select the object type to display from the choices: **Dynamically Linked Library, Job Submission object, Menu Message object, Menu object, Oracle Forms module, QuickFlow object.**
  - c. Click  to sort objects, if desired.
  - d. In the left frame, double-click each item you want to add to your personal menu.
  - e. Move the selected items to the right pane by clicking .
3. You can remove any unwanted entries by double-clicking the item in the right-hand pane, turning it blue, then clicking .
4. When you are finished, click  (Save) or press .
5. Click  (Exit) to return to the Banner menu.
6. Click the [Menu](#) link (top-right) to refresh the **My Banner** menu, reflecting your changes.

# Developing Your Own Personal Banner Menu Using The Pop-up Menu

1. Right-click on a blank area of any form.
2. Select **Add to Personal Menu** on the pop-up menu.
3. Click [Menu](#) on the General Menu page to refresh the menu, including your added form.



A Personal Menu


## Using The My Banner Menu

1. Double-click **My Banner** in the General Menu to open your personal menu.
2. Double-click any form in the menu to open it.

**Tip:** You can change your settings to specify that your My Banner menu is already open when you log on. See the next section for details.

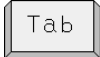
## Setting User Preferences

Access the user options on the General Menu as follows:

- From the **File menu**, select **Preferences**.
- **or**
- In the **Go To** field, type **GUAUPRF** and then press .

## Start Menu Options

You can change how Banner acts on start up.

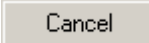
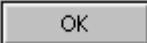
1. Click the **Menu Settings** tab.
2. Change the **User Default** value to **\*Personal**, then press . **My Banner** will be filled in.  
**Note:** You must log out and log in again before this setting takes effect.

## Alert Options


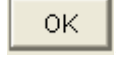


Alert Options (on the **Display Options** tab) enable you to customize how you are prompted by Banner for the following:

- **Prompt Before Exiting Banner**—Check this box if you want Banner to verify that you want to quit the Banner session before exiting. Unchecking the box allows you to exit without confirmation.
- **Display Additional Confidential Alert**—Check this box if you want an extra Confidential message displayed for records that contain confidential information.
- **Display Additional Deceased Alert**—Check this box if you want a Deceased message to display for records associated with a deceased person.

## User-Defined Window Colors

You can use the **User Interface Color Settings** (on the **Display Options** tab) to customize the color of buttons, such as  and  (buttons in the toolbar are not included), canvas (background space) of all forms, record highlighting, scroll and separator bars, Code/Description prompts, canvases within the General = Menu, including the broadcast message, menu, and menu tree canvases.

To change the color of an item at the user level:

1. From the **File** menu, select **Preferences**. Make sure the **Display Options** tab is selected. Make your changes on the User Interface Color Settings section on the right.
2. For the item you want to change, click the  in the **User Value** field. The **Select color** dialog box opens.
  - On the **Swatches** tab, you can choose a pre-defined color.
  - On the **HSB** tab, you can create your own shade by using HSB values (Hue Saturation Brightness).
  - On the **RGB** tab, you can create your own shade using RGB values (Red Green Blue).
3. Click .
4. Click  (Save) or press  to save your changes.



**Note:** Please be cautious about changing canvas or text colors. The text color and canvas color can NOT be the same. If they are, you will no longer be able to read the text!

We recommend you work with the default color settings for a short while to get used to the displays before you begin making changes.

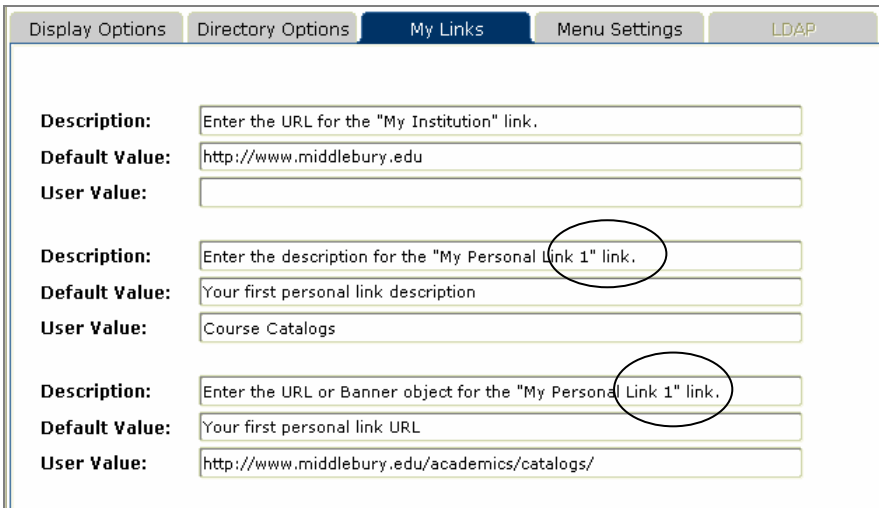
## Adding Personal Links To The Banner General Menu

You can add up to 6 personal links to web sites or Banner forms on the Banner General Menu.

To add or change Personal Links:

1. From the **File** menu, select **Preferences**.
2. Click the **My Links** tab.
3. Enter a name for the link you want to change in the **User Value** field.
4. Enter the URL (actual web address) or form name for the link you want to change in the next **User Value** field. See the illustration on the next page. Note that your configuration of a personal link requires two sets of **Description**, **Default Value**, and **User Value** fields.
5. Click  (Save) or press  to save your changes.

Note the two sets of **Description**, **Default Value**, and **User Value** fields.



Field	Value
Description:	Enter the URL for the "My Institution" link.
Default Value:	http://www.middlebury.edu
User Value:	
Description:	Enter the description for the "My Personal Link 1" link.
Default Value:	Your first personal link description
User Value:	Course Catalogs
Description:	Enter the URL or Banner object for the "My Personal Link 1" link.
Default Value:	Your first personal link URL
User Value:	http://www.middlebury.edu/academics/catalogs/

**Note:** Make sure you do not have pop-ups blocked with third-party software while adding Personal links.