

Getting Around in Banner

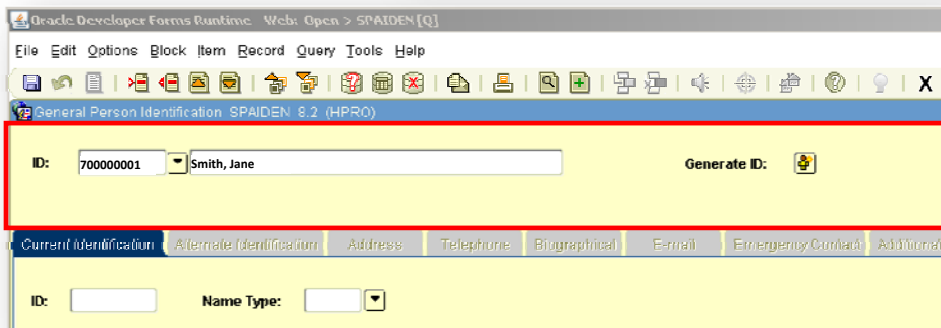
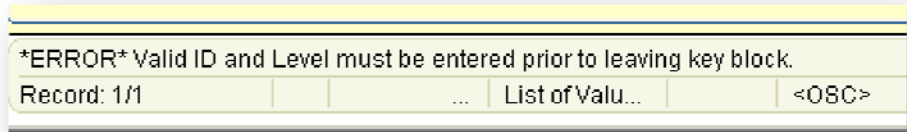
Learn navigation within a form, query techniques and person search.

Navigating within a Form

Understanding the parts of a form is essential to understanding navigation steps. [Click here](#) to learn about parts of a form.

Many application and inquiry forms contain a Key block at the top of the page where information must be selected or entered. Key block information is specific to each form. A down arrow next to a field in any block provides a pull-down list of pre-defined values or a query form from which a value may be selected.

Check the Auto Hint on the bottom left for guidance.



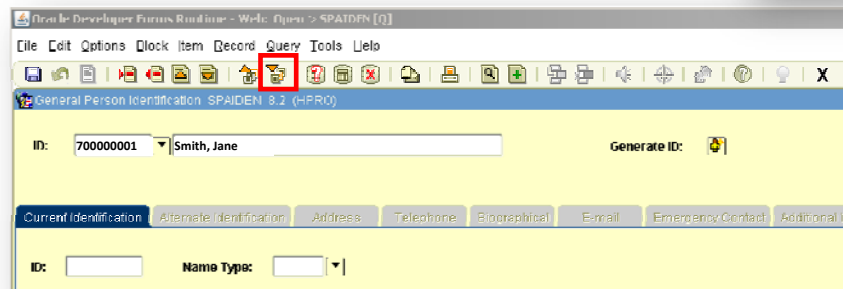
In this example, a student's known Hofstra ID number was entered in the ID field. The name appears for your verification.

Once required key block information is entered, move to the next block.

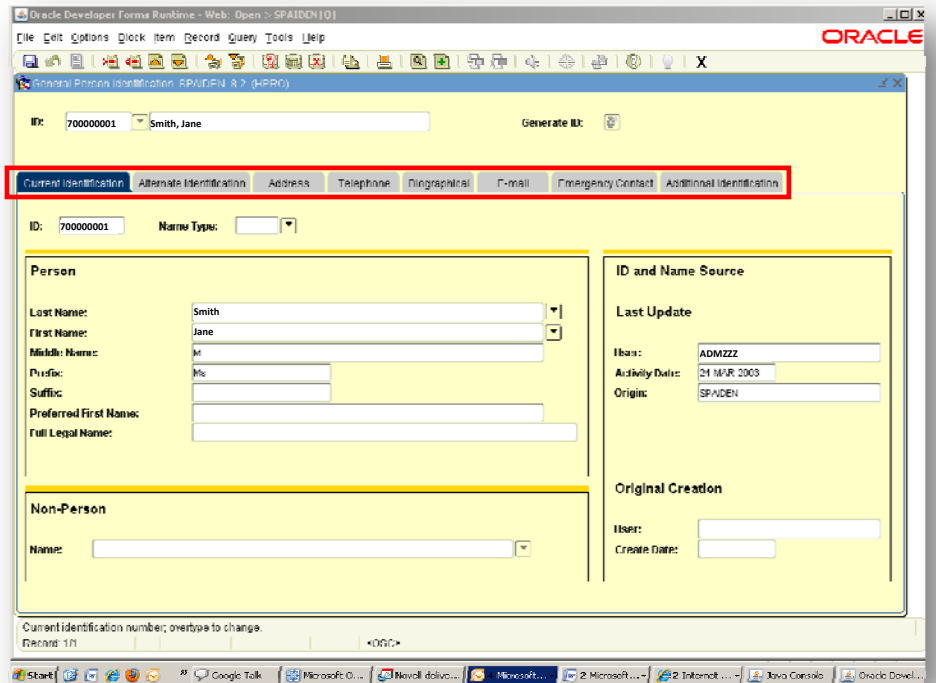
- Click the NEXT BLOCK Icon in the toolbar or CTRL and Page Down keys



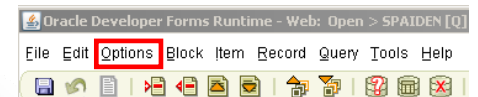
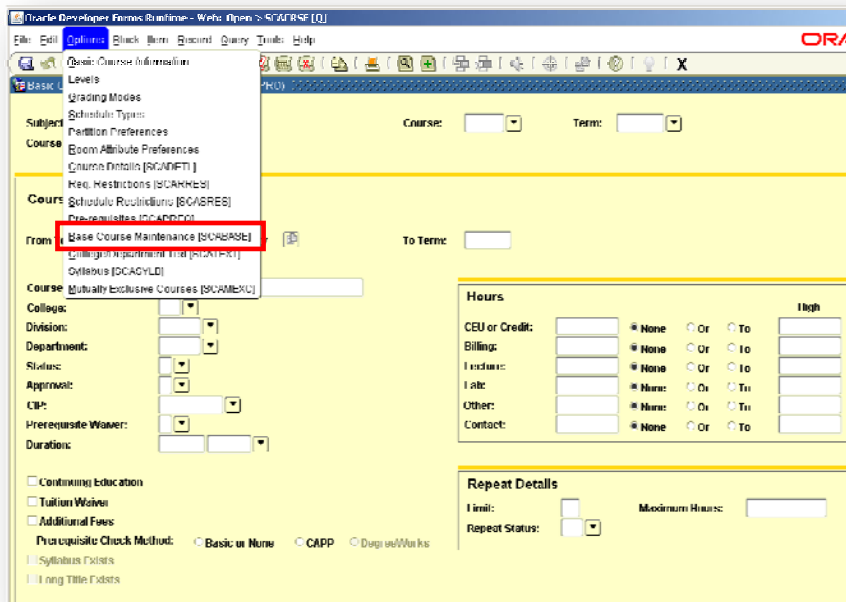
The Next Block function brings existing data to the additional blocks as defined in the key block or allows data entry.



Some forms contain tabs that categorize information in each block. Click a tab to move to the data or entry fields.



On other form, it may be necessary to click NEXT BLOCK more than once to move to additional blocks within a form.




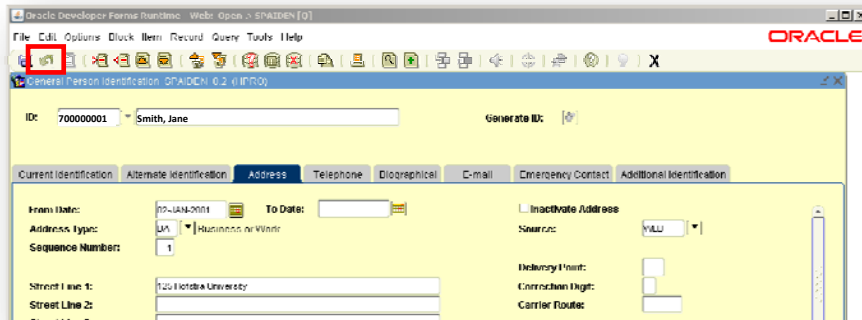
A good strategy is to click the OPTIONS pull down menu. Quick links to other blocks within a form will be listed along with links to other related forms.

Note: Banner allows access in more than one form at the same time.

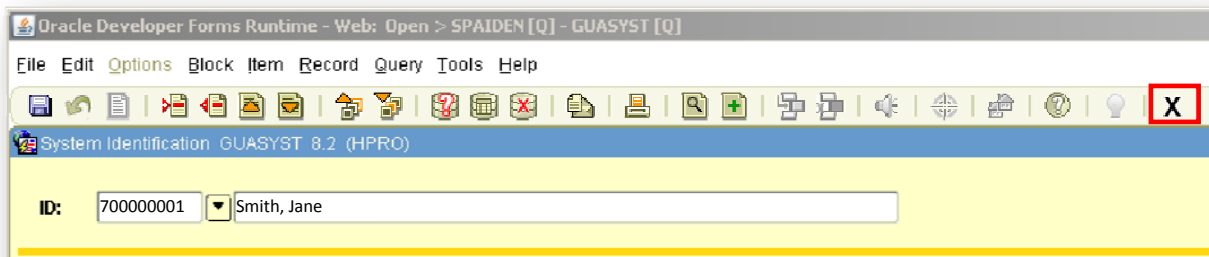
Click on the block or form within the Options pull-down list.

Note: Items listed under the Options menu are dependent on cursor location within the form.

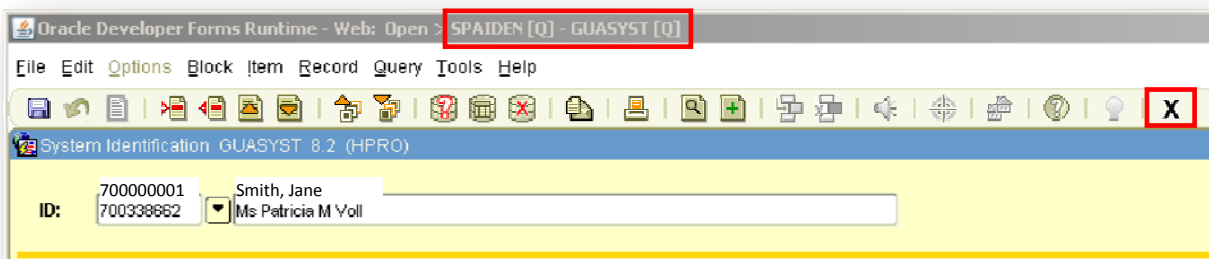
- To RETURN to a Key block, click the Rollback toolbar icon. 



- To EXIT and return to the main menu or parent calling form, click the Exit toolbar icon "X" or F10 shortcut.



When two forms are accessed at the same time, the forms names will be listed in the header bar. The parent calling form is listed first followed by any other forms.



- Click the Exit toolbar icon to return or exit each form.

In this example, Exiting GUASYST will return to the SPAIDEN form or parent calling form. Exiting SPAIDEN will return to the main menu.

Query Techniques

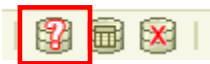
Many forms in Banner can be queried (searched) to find information already stored in the database.

- Identify query possibilities by identifying lines of data that are highlighted in Yellow.
- Verify that the form is in Query mode by checking the Auto Hint line.

Enter a query; press F8 to execute, Ctrl+Q to cancel.
Record: 1/1 Enter-Qu...

ZIP or Postal Code	City	County	State or Province	Nation	Activity Date
00010	Palmsville	08015	NH		18MAY-1999
00018	Palmsville	08015	NH		18MAY-1999
00012	Palmsville	08015	NH		18MAY-1999
00010	Pottersouth	08015	NH		10MAY-1999
00014	Pottersouth	08015	NH		10MAY-1999
00010	Pottersouth	08015	NH		10MAY-1999
00028	Yatesville	08000	NY		10MAY-1999
00044	Yatesville	08000	NY		10MAY-1999
00008	Albany	08001	PR		18MAY-1999
00002	Aguaada	08000	PR		10MAY-1999
00008	Aguaada	08005	PR		18MAY-1999
00008	Aguaada	08005	PR		18MAY-1999
00008	Aguaada	08005	PR		18MAY-1999
00008	Maricao	08000	PR		18MAY-1999
00011	Manaca	08011	PR		18MAY-1999
00018	Pugetes	08015	PR		10MAY-1999
00017	Arriba	08015	PR		18MAY-1999
00010	Arriba	08015	PR		10MAY-1999
00014	Arriba	08013	PR		18MAY-1999
00010	Arriba	08013	PR		10MAY-1999
00017	Arriba	08017	PR		18MAY-1999
00022	Bogotran	08022	PR		18MAY-1999

- When a form is NOT in query mode, click the ENTER QUERY toolbar button to put the form in query mode.



Once the form is in query mode, you can enter query criteria. Move your cursor to the field you wish to query and enter a value.

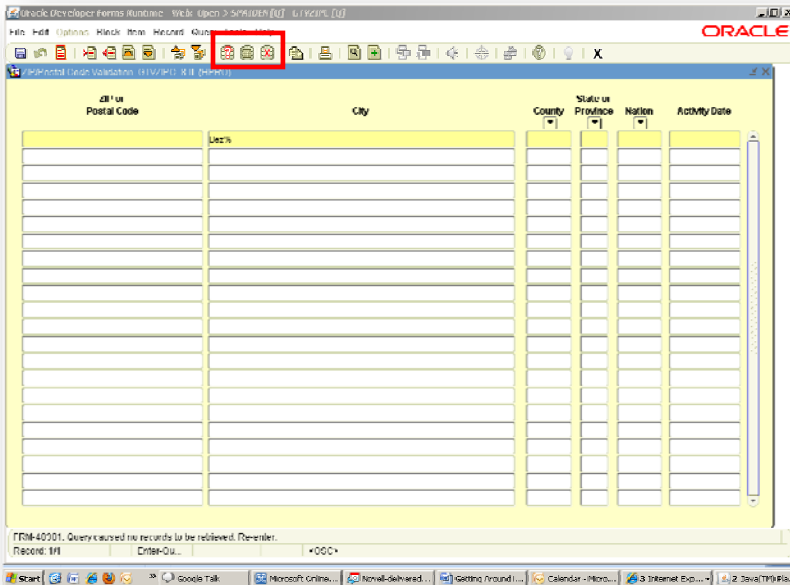
ZIP or Postal Code	City	County	State or Province
Bellm%			NY

Use of the wildcard value % is acceptable. (Wildcards take the place of unknown or possible values. The % value can be entered more than once within a criteria value. Example: xxx% or %xxx%)

- Click the EXECUTE QUERY button after all query criteria is entered.




The form will search the database and retrieve all records that match the query criteria.



If no records match the query criteria, a message will appear in the Auto Hint.

To search with new criteria

- Click the ENTER QUERY button. 
- Enter new criteria.
- Click the EXECUTE QUERY button.

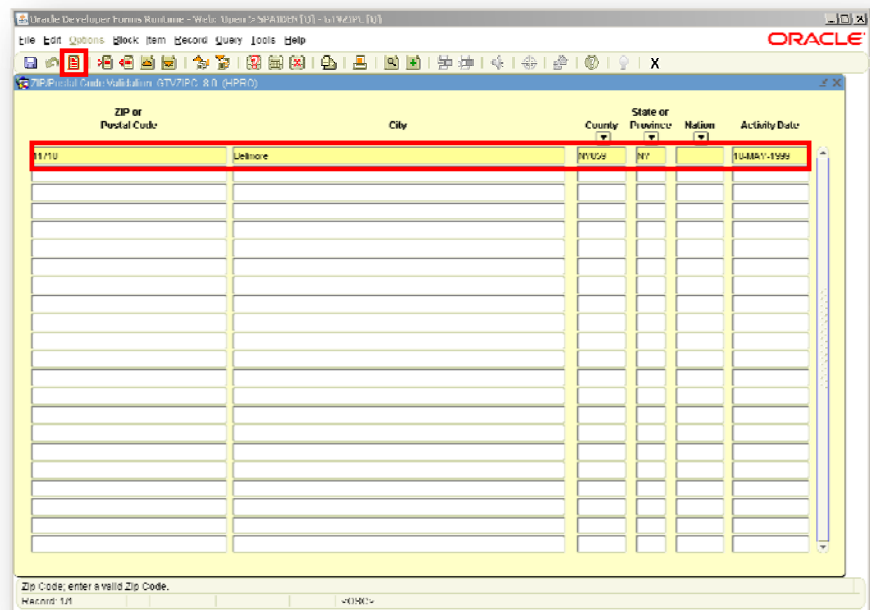


If the SELECT button display in RED, the function is active.



The value highlighted in yellow can be chosen for use in a prior field.

Click the SELECT button or double click the highlighted line item or value.

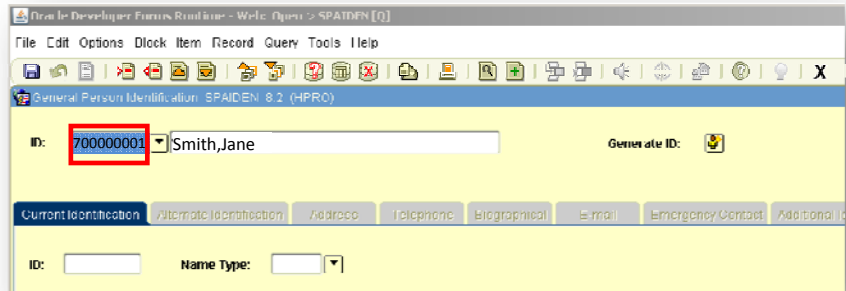


ID/Name Search

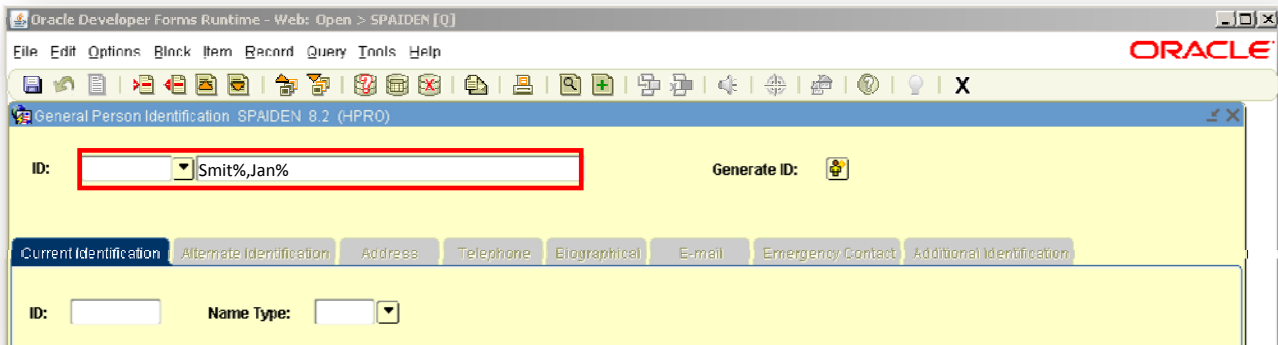
To find a name and/or ID in Banner, you can search from a key block or querying within a Name Search form specific to the Finance, Payroll, Student and Alumni systems. The examples below are for the Student system.

Search from a Key Block

To begin a search, remove any existing ID value in the key block. Highlight the value and hit the space bar or any key.

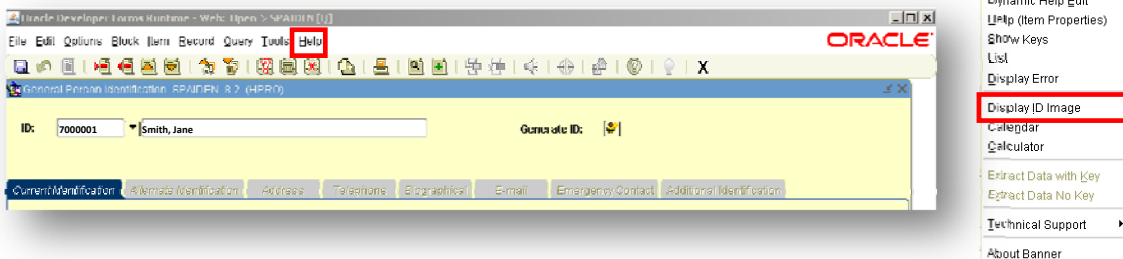


Once the ID field is blank, Tab to the name field and enter a value in lastname, firstname format with wildcards. Press ENTER. Remember to type the comma between the last and first name.

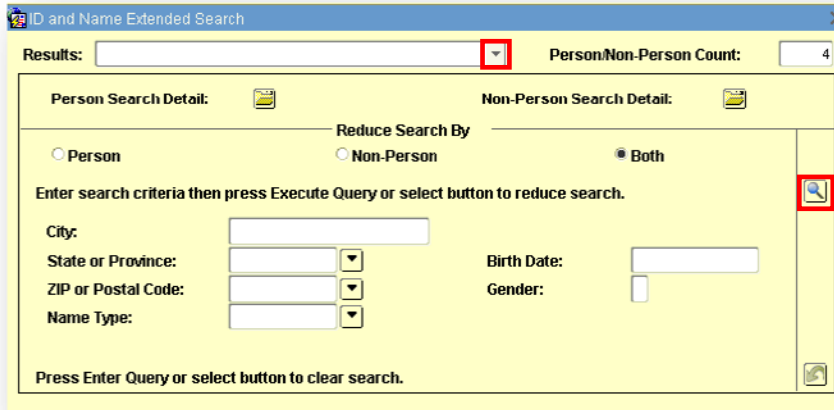


If a match is found, verify the name and information within the key block.

You can also verify your choice by comparing a HofCard to the picture found under the HELP pull down menu. Click Display ID Image.



If no match is found, the ID and name are returned to the form.



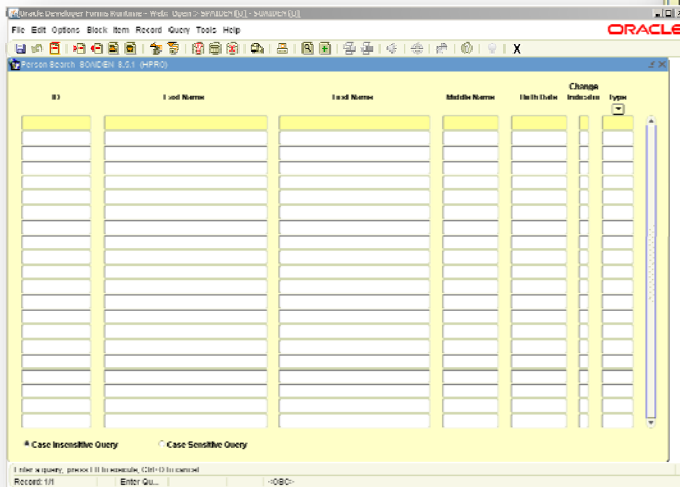
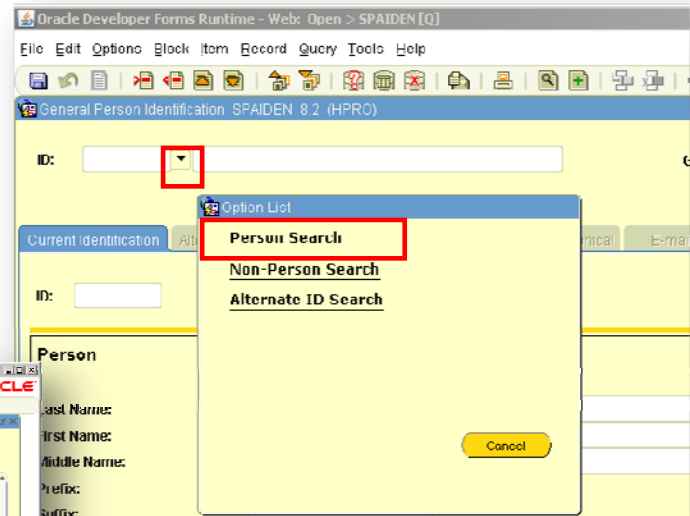
If more than one match is found the ID and Name Extended Search window open. Select the ID/name from the Results drop down. You can also reduce the search by entering criteria in the Reduce Search By section and click the listing Magnifier icon.

Query with a Name Search form

Name Search forms generally have a unique identifier or last four characters of IDEN. Often times they are access by clicking the Arrow Down menu next to the ID field.

Choose from the options window to open a specific query form. The most common search, Person Search, will be illustrated in this example.

Form SOAIDEN opens ready for query criteria to be entered.



HINT: Form SOAIDNS is another helpful Name/Id Search form for the student system.