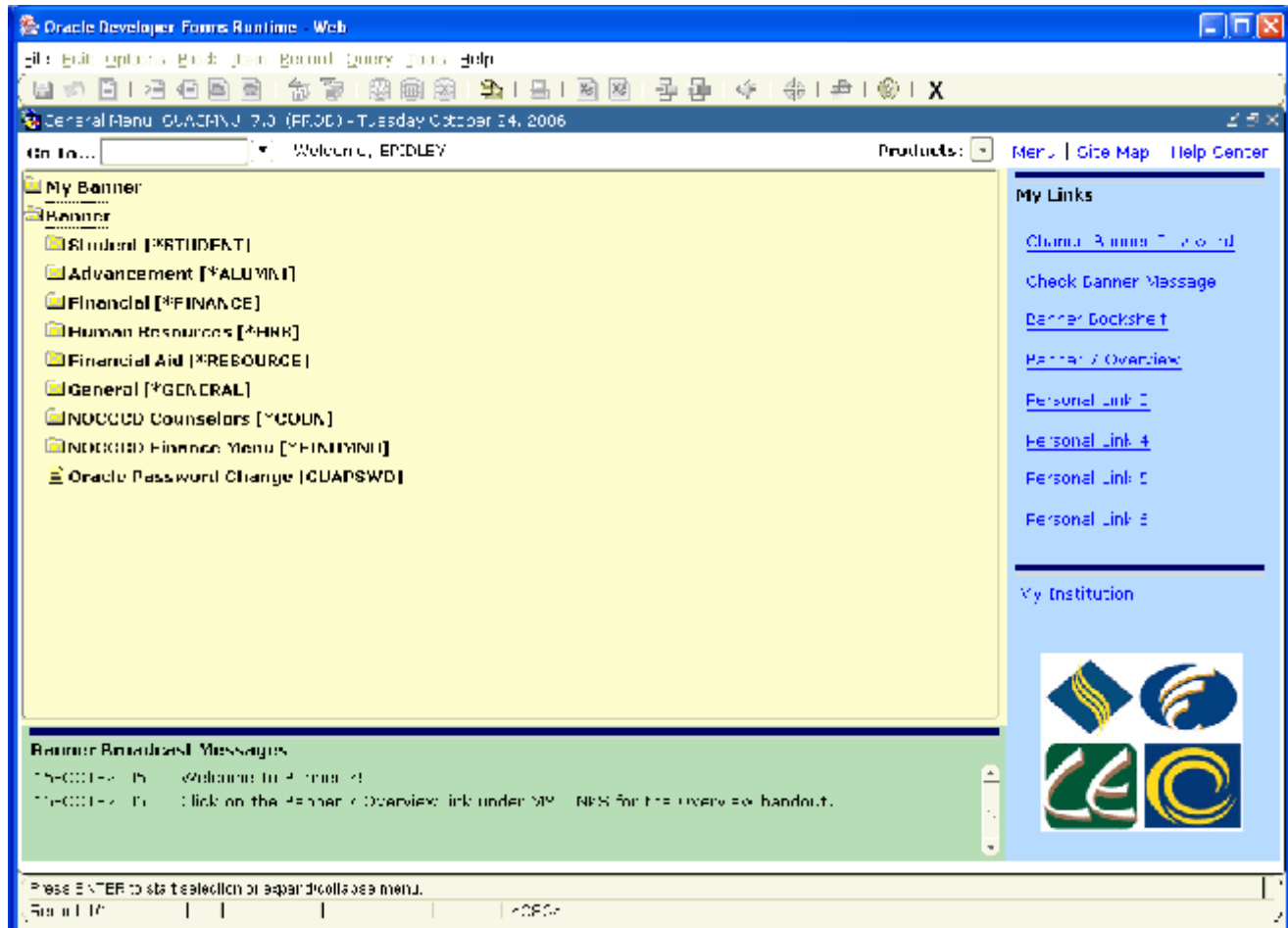


# Banner

## Basic Navigation Training



Presented by:  
**North Orange Community College District**  
**INFORMATION SERVICES**

1830 W. Romneya Drive  
Anaheim, CA 92801

Help Desk: 714-808-4849

# Banner Basic Navigation Training

## TABLE OF CONTENTS

FERPA .....	1
Basic Navigation Training .....	2
Purpose .....	2
How to Logon to Banner .....	2
Introduction to the Banner Interface .....	3
Forms .....	4
Accessing through Menus .....	4
Direct Access .....	4
Navigating through a Form .....	5
Limit on Open Forms .....	5
Banner Naming Conventions .....	5
Types of Forms .....	6
Parts of a Form: SPAIDEN .....	6
Banner Toolbar .....	6
Parts of a Form .....	6
Title Bar .....	6
Key Block .....	7
Blocks .....	7
Moving from Block to Block .....	7
How Many Blocks .....	7
Auto Hint Line .....	7
Clearing a Form .....	7
Options .....	8
Searching in Banner .....	8
Finding a Person when you know their ID .....	8
Finding a Person when you DO NOT know their ID .....	8
Wildcards .....	8
Query Results .....	8
So What's Your Real Name? .....	9
Extended Search .....	9
Creating a New Record .....	10
Entry into Banner .....	10
Miscellaneous Information .....	11
List of Values (LOV) .....	11
Searchable FIELDS .....	11
Function Keys vs. Mouse .....	11
Customizing Banner .....	12
My Links .....	12
Customizing Personal Links .....	12
Display Options Tab .....	12
My Links Tab .....	13
My Institution .....	13

Personal Links .....	13
New Help Center Link .....	14
Features of Online Help .....	14
Accessing Online Help from a Form .....	14
Accessing the Help Center .....	14
Features of Online Help .....	14
Browsing for Topics .....	14
Searching for Topics .....	15
Using the Index .....	15
Using the Field Link .....	15
Other Helpful Tools .....	15
Calendar and Calculator .....	15
Training Handouts .....	16
Navigation .....	16
Finance .....	16
Banner 7 .....	16

# FERPA

**What is FERPA?** FERPA is the **F**amily **E**ducation **R**ights and **P**rivacy **A**ct of 1974. It's a federal law that protects the privacy of student education records. It basically tells us what we can and cannot do with student information. For more information about FERPA, you can visit their home page at: <http://www.ed.gov/policy/gen/guid/fpco/ferpa/index.html>

FERPA states that institutions can give out directory information without the consent of the student. FERPA defines **directory information** as name, address, phone number, birth date, etc. However, the NOCCCD Board of Trustees have further defined what we, NOCCCD, can give out as directory information in **Board Policy 5040, section 5.0**. This policy states that the *only* information we can give out without student consent is:

- ! Student participation in officially recognized activities and sports including weight, height and high school of graduation of athletic team members.
- ! Degrees and awards received by students, including honors, scholarship awards, athletic awards and Dean's List recognition.
- ! See [http://www.nocccd.edu/Policies/PDFs/5040.BP\\_062005.pdf](http://www.nocccd.edu/Policies/PDFs/5040.BP_062005.pdf)

## What does this all mean to me?

By having a **Banner login**, you have access to information that is covered by FERPA. It is very important that you understand the seriousness of keeping student information confidential.

**Do you currently use someone else's username to access Banner?**

**Do you allow others to use your Banner username and password?**

**\*NEVER loan out your username and password!** If someone else uses your username and password and violates FERPA, you can be held accountable.

**\*NEVER use anybody else's username or password!** This is against NOCCCD policy.

Under the law, **individual's can be held responsible for FERPA violations**, not just the institution.

If your supervisor will be out of the office for an extended period of time, and you need more access rights to Banner, call the Help Desk at 84849. With the proper approvals, changes can be made to your Banner security on a temporary basis. **DO NOT use your supervisor's username and password.**

# Basic Navigation Training

## Purpose

The purpose of this training is to “familiarize” you with the Banner interface and demonstrate how to navigate through the modules. It is not meant to teach you any specific task, but is designed to make you comfortable with:

- naming conventions
- accessing forms
- navigating from record to record and from block to block
- finding individual records via searches

The functional training, which you will get from the people you work with, will give detailed information on the forms you will use and how to use them.

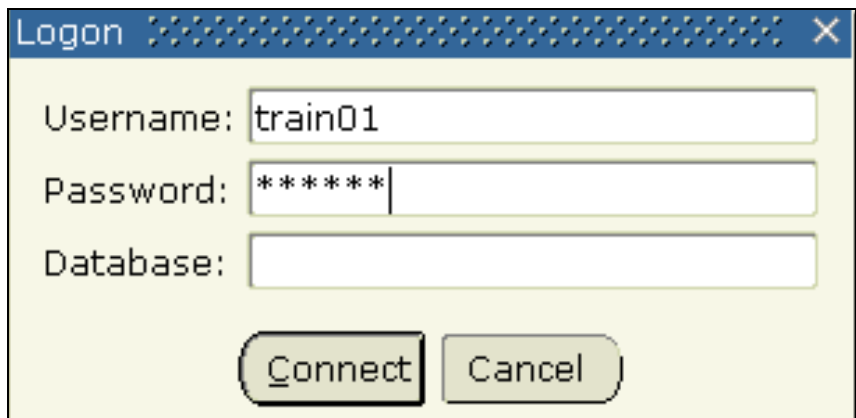
There are 5 possible modules to which you may have access to:

- Student
- Finance
- Human Resources
- Financial Aid
- Alumni

What you learn today can be applied to all of the modules and is not specific to any one module.

## How to Logon to Banner

1. Click on Banner icon on your desktop. This will open an Internet Explorer window.
2. It will pause and then open a second window in which the Logon displays.
3. Enter in your Banner user id and password. There is no need to enter in the database. The database is actually part of the URL on the first window, so there is no need to enter it in the logon screen.
4. Press the <ENTER> key or click on Connect (even if pointer continues as an hourglass).
5. When Banner comes up you will be in the **main menu, GUAPMNU**.



The screenshot shows a 'Logon' dialog box with a blue header and a close button (X) in the top right corner. The background of the dialog is light yellow. There are three text input fields stacked vertically. The first is labeled 'Username:' and contains the text 'train01'. The second is labeled 'Password:' and contains seven asterisks '\*\*\*\*\*'. The third is labeled 'Database:' and is currently empty. Below these fields are two buttons: 'Connect' and 'Cancel', both with rounded corners and a slight shadow.

**\*\*NOTE:** Even though the first window looks blank, it is needed in order to run Banner. If you need to use the internet, **DO NOT USE THIS WINDOW!** You will need to open a new Internet Explorer session by clicking on the IE icon (the big blue “e”).

# Introduction to the Banner Interface

The first thing you'll see after you log on is the Banner Main Menu (GUAPMNU). It lets you select modules, menus and forms. Banner has the familiar Windows GUI interface and includes the standard items.

**Title Bar:** Lists the name of the program (Banner Internet Native).

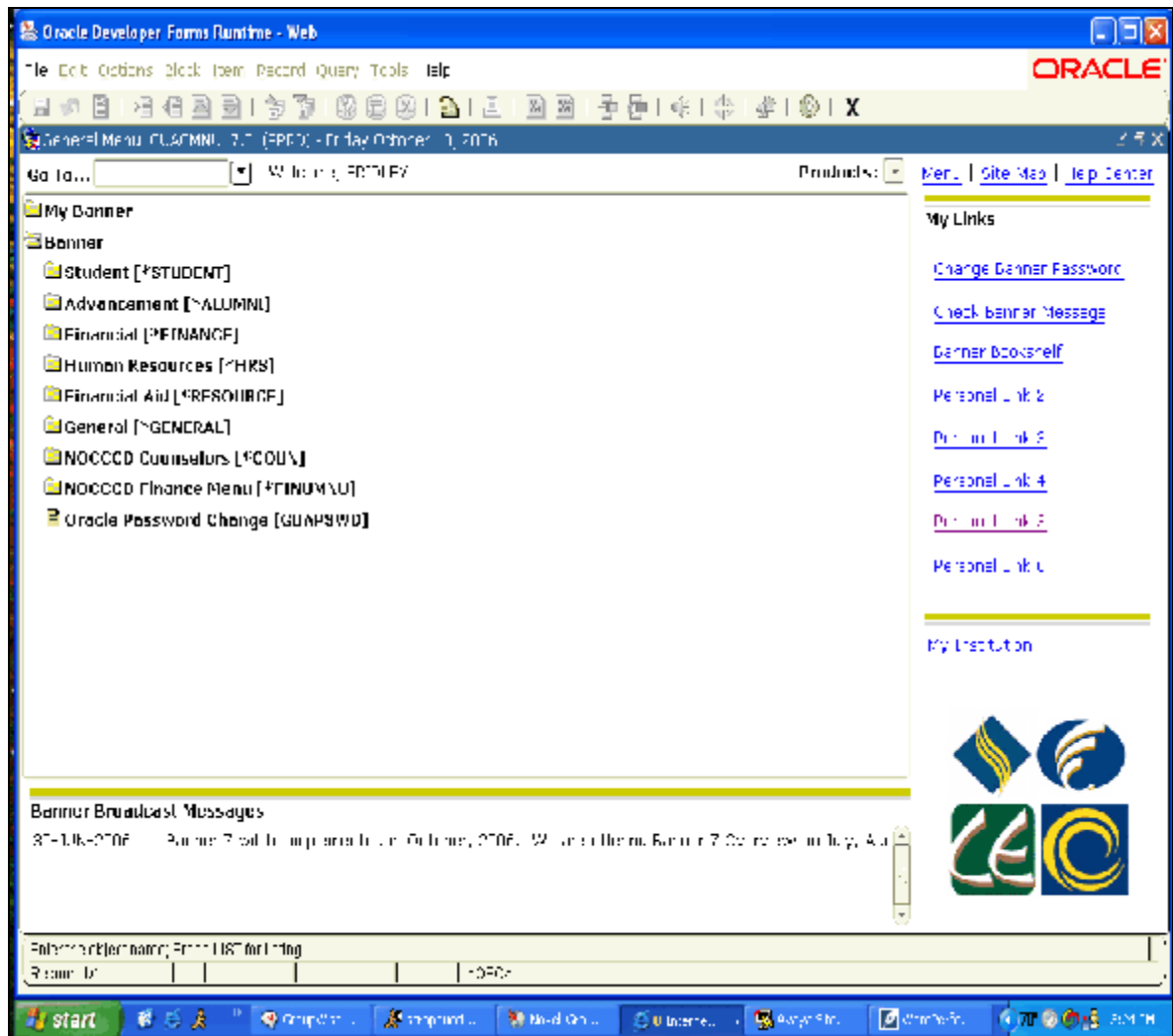
**Menu Bar:** Allows you to access pull-down menus (greyed out items unavailable at this time)

**Tool Bar:** Access to commonly-used features. Pointing at an icon on the toolbar causes a pop up term to display telling you what the icon is for.

**Main Menu:** GUAGMNU

Title Bar  
Menu Bar

Tool Bar



Banner  
Broadcast  
Messages

## The "Go To" Box

- Shortcut: Click inside the "Go To" field and use the up and down arrows on your keyboard to cycle through the forms that you have used during the current session of Banner. Once you log out, the list will reset.

- If you click on the down arrow next to the “Go To” field you are taken to GUIOBS, where you can search for a object (a.k.a. “form”) by either its name or description.

**You will see 2 main folders: My Banner and Banner.** My Banner is a folder you can customize with the forms that you use all the time. Depending on what security you are given you may, or may not, see the folders listed under the main Banner folder.

**Banner Broadcast Messages** is at the bottom of the screen. This is where we can easily get messages to all Banner users.

**My Links** is located to the right side of the screen. My Links has several preprogrammed links, such as “Change Banner Password” and “Banner Bookshelf”. There are also several links that you can customize yourself. These links can be programmed to go to another website or a favorite form in Banner.

The **Banner folder** is the main folder and holds all the systems and forms that you have access to. Everyone has access to **GENERAL** forms. You will most likely have access to either the **STUDENT** and/or **FINANCE** folders.

- NOCCCD Finance Menu is a folders that was created with the most common finance forms. These forms are also located in the main FINANCE folder.
- NOCCCD Counselors is a folder with the most common forms that counselors use. These forms are also located in the STUDENT folder.

As you double click on the folder icons, the folder will open showing the contents of the folder. Double click on an “open” folder and it will close.

## Forms

A form is an online document where you can enter and look up information in your database. Banner uses many types of forms to enter and access information. A form can be accessed through a series of menus or, if you know the name, by **DIRECT ACCESS**.

### Accessing through Menus

You can find the form you want to open by clicking on the various folders in the main menu.

- Double click on the STUDENT folder. This opens the folder and shows you more folders within the student system.
- Double click on the GENERAL PERSON folder. This opens the folder and shows you the contents in that folder are forms. Note the form icon is different from the folder icon.
- Double click on the form: General Person Identification [SPAIDEN]
- This opens the form SPAIDEN.

### Direct Access

If you know the 7-character name, you can type it in the “Go To” box and press enter. This will take you to the form immediately.

**SHORTCUT:** Click on FILE on the menu bar. The forms you have been to in THIS banner session will show. (Up to 10 forms). Once you shutdown for the day, this clears out.

**SHORTCUT:** Click in the Go To box. Using your up or down arrow on your key board, you can cycle

through the last forms you have been in. When you find the one you want, press enter.

## Navigating through a Form

You can perform tasks in Banner many ways:

- Keystrokes
- Pull-Down Menus
- Toolbar
- Mouse Click

For example: To exit a form you can do any of the following:

- Menus: File, Exit
- Toolbar: (Left) Click on the "X" (exit)
- Mouse: Click File, Exit
- Keystroke: Control+Q
- Right Click: to show you options, left click on "exit"

## Limit on Open Forms

You can open more than one form at a time... even several of the same forms with different information. However, you usually don't want to do this - it slows down your system appreciably. However, if you do not exit a form and open another, it will stay open. **BE AWARE!**

## Banner Naming Conventions

All Banner form names have a naming convention to them. Once you understand the basic idea behind how forms are named, this can help you.

All Banner form names are seven characters long.

- Position 1: Identifies the Primary System owning the form, report, job or table
- Position 2: Identifies the Module owning the form, report, job or table
- Position 3: Identifies the type of form, report, job or table.
- Positions 4-7: They try to summarize what the form is.

See below for some samples:

Position 1	Position 2	Position 3	Position 4-7
Identifies the Primary System owning the form, report, job or table	Identifies the Module owning the form, report, job or table	Identifies the type of form, report, job or table.	4-7 uniquely identify the form, report, job or table
<b>S</b>	<b>P</b>	<b>A</b>	<b>IDEN</b>
Student	Person	Application Form	Identification
<b>S</b>	<b>P</b>	<b>A</b>	<b>PERS</b>
Student	Person	Applications Form	Personal Info
<b>S</b>	<b>P</b>	<b>R</b>	<b>ADDR</b>
Student	Person	Report	Address
<b>F</b>	<b>T</b>	<b>M</b>	<b>VEND</b>
Finance	Table	Maintenance	Vendors
<b>F</b>	<b>G</b>	<b>A</b>	<b>JVCD</b>
Finance	General Ledger	Application Form	Journal Voucher Entry Form

## Types of Forms

(3rd letter of name indicates)

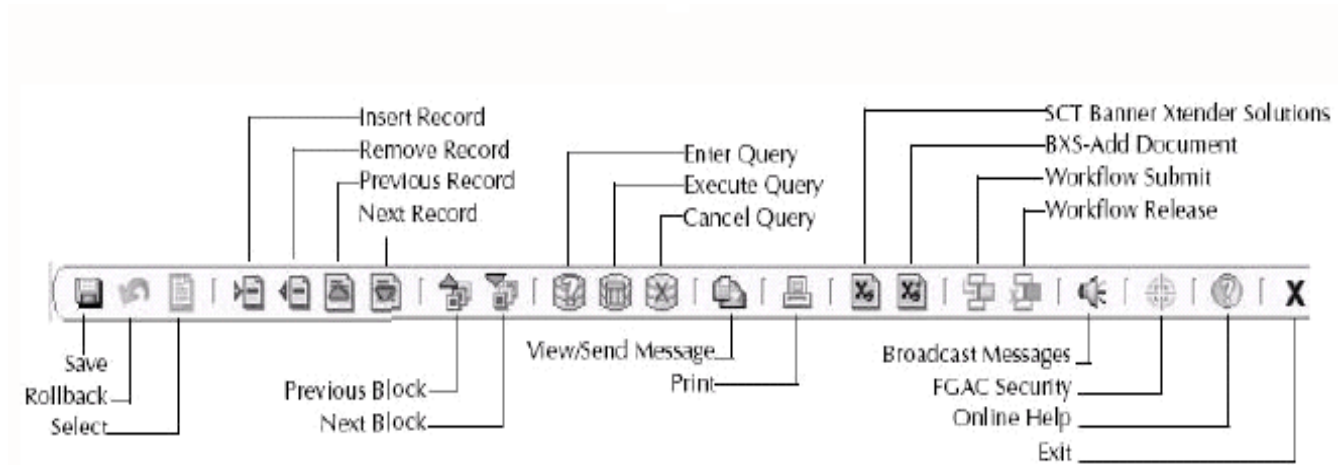
**A**pplication forms (SPAIDEN)

**V**alidation forms (STVSTAT)

**M**aintenance forms (FTMVEND)

**R**ule forms (GXR BANK)

**C**ontrol forms (AACDUES)



Inquiry Form (FPIREQN)

## Parts of a Form: SPAIDEN

### Banner Toolbar

Banner's toolbar is loaded with icons for the most common functions in Banner. See below:

- When you point to an icon on the tool bar a little pop up bubble will appear showing you what the icon is used for.
- If you are a key board person, click on Help, Show Keys. This will bring up a list of most of the short cut key strokes.

### Parts of a Form

Access SPAIDEN. Notice the cursor is in the ID Field.

#### Title Bar

On the title bar you will find various information:

Descriptive Form Name: General Person Identification

7-Character Form Name: SPAIDEN

Release Number: 7.3

Database Name: PROD

The very top part of the form is called a **KEY BLOCK**. This is where you will enter the Banner number of the person you wish to see. All forms have a key block.

Then notice the rest of the form is divided into what looks like **BLOCKS**.

**Key Block:** The first block on most forms contains key information. All information on form refers to the key block. When you choose File, Rollback, you go back to Key Block. You can also click Rollback Icon (backwards arrow) on Toolbar. The key block usually stays on the form as subsequent blocks appear.

### Blocks

A block is a section of a form or window that contains related information. If a form contains more than one block each block (except the key block) may be enclosed in a beveled box. Some forms will have tabs directly under the key block showing the various blocks of data that you can access while using that form.

### Moving from Block to Block

Toolbar: Next Block, Previous Block  
Menu: Block, Next or Previous  
Keystrokes: Control+Page Down or Control+Page Up  
Tabs: Click on the tab you want.

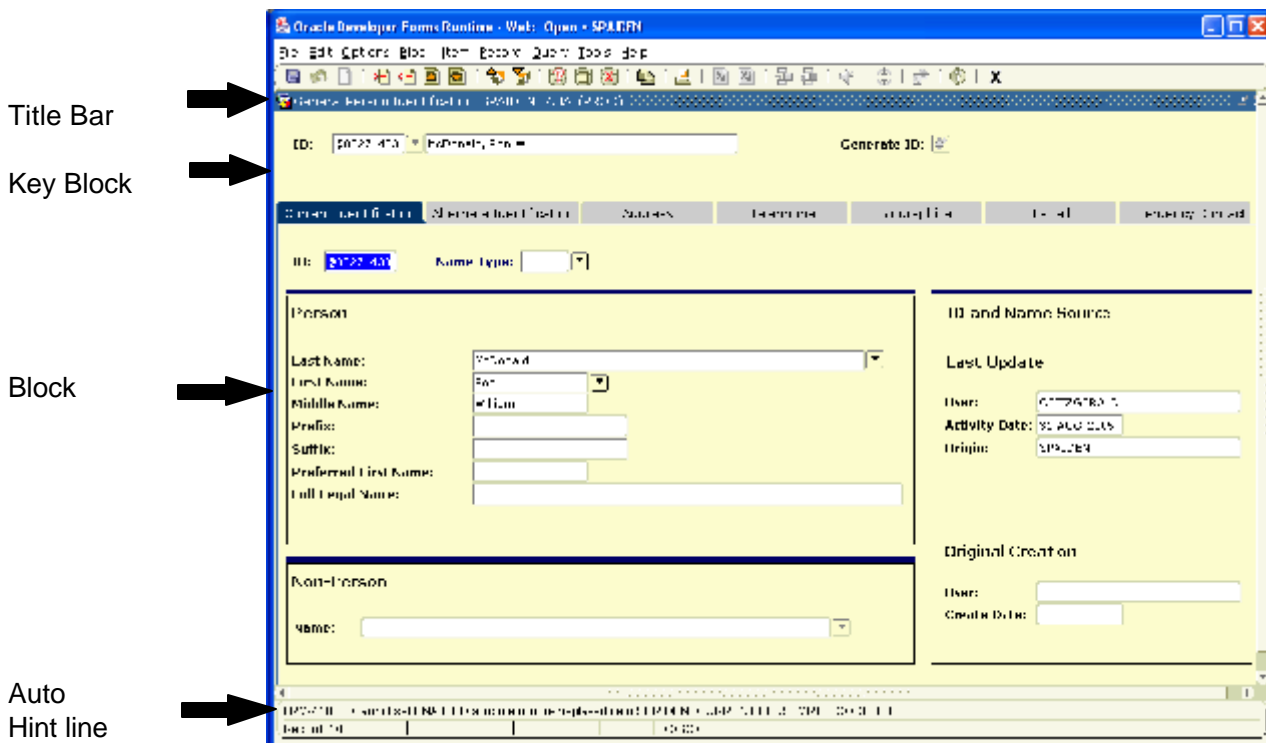
### How Many Blocks:

The number of blocks vary from form to form. Press Next Block until you return to the starting block. To return to Key Block: Click File, Rollback or click on the Rollback icon.

**Auto Hint Line:** The Auto Hint line is the grey line at the bottom of the screen. Banner will try to help you along. This is where it will display error messages, etc. If Banner doesn't do something that you thought it would, make sure to check the Auto Hint line for any details.

### Clearing a Form:

From the Menu: Record, Clear



## Options

Under “Options” on the menu you will find a list of various options available to you. Some options take you to a block within the form and others take you outside the form to a related form. The options display depending on the current location of the cursor. Reminder: Use the mouse or Alt + underlined letter to access these pull-down menus.

## Searching in Banner

### Finding a Person when you know their ID

- Enter the person’s banner ID (always begins with the “@” sign).
- The Name associated with the banner number appears.

### Finding a Person when you DO NOT know their ID

When you don’t know someone’s banner ID number or their social security number, you will have to look them up by their name. Please note that everyone **MUST** have a Banner ID number, however, SSN’s are not a required number. So, someone can be in the system without their SSN.

- Click on the search button (down arrow) on the key block in SPAIDEN.
- Click on Person Search
- Notice the search form **SOAIDEN** displays. (SOAIDEN = **S**tudent, **O**verall, **A**pplication, **I**DEN)

You can always tell when you are in “search mode” as the Auto Hint line will always display:

**Enter a query; press F8 to execute; Ctrl+Q to cancel.**

## Wildcards

There are two wild cards in banner: the % sign and the underscore \_\_\_.

% is the wildcard for many characters

\_\_\_ is the wildcard for one character

S% in last name field this gives us names starting with “S”

S%son in last name field this gives us names beginning with the letter “S” and ending “son”.

S\_a% in last name field this gives us names with “S” in first position and “a” in 3rd position.

W\_\_gand gives us names starting with “W”, then any two characters, followed by “gand”.

**Press F8 and the results will display.** You can also click on the “execute query” button on the toolbar. To select an entry, double click on it. If the results are not what you want, click in “Enter query” on the toolbar, or press F7 to start another query.

## Query Results

When you get your query results there are several things you may notice:

- There are what appear to be many duplicates (same name and birthday).
- Anyone that was part of the college system prior to going to Banner will have an old perm ID (6 digits). To differentiate these numbers, a “**C**” was put in front for all Cypress perm IDs, “**F**” for Fullerton and “**S**” for School of Continuing Ed.

- Some people have SSN's and others do not. The SSN is not a required number, so even though most people have them in the system, some will not. You just need to be aware that if you don't find someone by their SSN, it does not mean they are *not* in the system.
- "N" in Change Field indicates there was a name change.
- "I" in Change Field indicates there was an ID number changed.
- Regardless of other possible ID's, the Banner number is the most current.
- The Banner ID number always begins with the "@" sign and is a total of 9 characters. For example, @00123456.

## So What's Your Real Name?

Frequently in the student system, a student will come in and say they have no perm number or they have never been here before. It is really critical for data integrity to always do a thorough search before entering someone in the system.

- Go to SPAIDEN, click on search button. This takes you to the search screen SOAIDEN.
- Notice that the case sensitivity is turned off.
- In the last name field key in m%donald.
- Press F8 to execute the search. Notice the birthdays. N indicates Name Change  
I indicates Identifier Change

ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Type
@00123456	Donald	John		01/01/1980	N	I
@00123457	Donald	John		01/01/1980		
@00123458	Donald	John		01/01/1980		
@00123459	Donald	John		01/01/1980		
@00123460	Donald	John		01/01/1980		
@00123461	Donald	John		01/01/1980		
@00123462	Donald	John		01/01/1980		
@00123463	Donald	John		01/01/1980		
@00123464	Donald	John		01/01/1980		
@00123465	Donald	John		01/01/1980		
@00123466	Donald	John		01/01/1980		
@00123467	Donald	John		01/01/1980		
@00123468	Donald	John		01/01/1980		
@00123469	Donald	John		01/01/1980		
@00123470	Donald	John		01/01/1980		

## Extended Search

An extended search is a way of doing a search directly from the screen (without going into the search screen).

- From SPAIDEN, tab to Name field and enter current last name, i.e., m%donald
- Press <ENTER>
- The ID and Name Extended Search box comes up. It shows you how many people met that criteria.
- Click on the drop down arrow to see the results.
- Notice that this search will also show previous names.
- The name that is left justified is current name
- The names that are indented are the previous names.
- You can reduce the search results by giving it additional information, ie: city, state, etc.

Extended Search Results:

Name	Birth Date
Donald, John	01/01/1980
Donald, John	01/01/1980
Donald, John	01/01/1980
Donald, John	01/01/1980
Donald, John	01/01/1980
Donald, John	01/01/1980
Donald, John	01/01/1980
Donald, John	01/01/1980
Donald, John	01/01/1980
Donald, John	01/01/1980

# Creating a New Record

It is important when creating a new record to make sure the person does not already exist in Banner. We do not want to create duplicate entries for the same person! This procedure only applies to the people that create new Banner IDs. Not many people can create and/or update this information. The following areas are primarily responsible for creating new IDs: A&R offices and Human Resources.

## Entry into Banner

Usually people are entered into Banner in SPAIDEN, however they can also get there from other "IDEN" forms, such as FOAIDEN and PPAIDEN.

- Go to SPAIDEN. Click on GENERATE ID.
- You will be taken to a common matching screen called GOAMTCH.
- Notice the ID field says "Generated".
- Select ONLINE\_GENERAL in the Matching Source field.
- Next Block to the Last Name field. Enter the last name. You may use the % sign if needed.
- Tab to the First Name field. Enter in the first name. You may use the % sign if needed.
- The more information you can enter (street, phone number, birthday, etc) the better. It gives Banner more information to match against.
- Click the Duplicate Check box (located in the middle of the screen). This will cause Banner to start searching.
- If only one match is found, the information will appear in the Match tab. If more than one match is made, the information will appear in the Potential Matches tab. Make sure to view all potential matches.
- **SELECT ID:** Select this button if you found an existing record that is a match for the one you are entering and the information is the same as what you had entered (name, address, phone, etc). This will populate the form with the person's information.

ID	Name	SSN/SIN/TIN	Birth Date	Gender	Matched e-Id	e-mail	Address	Telephone	E-mail
FOA00005	FOA00005, FOMAL	1-1-1111	11-11-11	F	PP-111	11111111	11111111111111111111	1111111111	1111111111
SPA00100	SPA00100, FOMAL	1-1-1111	11-11-11	M	PP-111	11111111	11111111111111111111	1111111111	1111111111
SPA00100	SPA00100, FOMAL	1-1-1111	11-11-11	F	PP-111	11111111	11111111111111111111	1111111111	1111111111
FOA00005	FOA00005, FOMAL	1-1-1111	11-11-11	F	PP-111	11111111	11111111111111111111	1111111111	1111111111

- **UPDATE ID:** Select this button if common matching found a match but there was information that needed to be updated, such as phone, address, etc. This will cause Banner to open the existing record and update it with the information that you had entered.
  - **CREATE NEW:** If none of these students match the student you are searching for and you want to create a new Banner ID, click on the box **CREATE NEW**.
- \*\* **IMPORTANT:** If you used a % in your searching, it is important that you **DO NOT** create a new Banner ID, as Banner will save the student name **WITH** the % sign!! You should click on **CLEAR AND RETURN TO DATA ENTRY**. Remove the % signs and fill in the appropriate information. Once that is done, you can click on **CREATE NEW**.

## Miscellaneous Information

### List of Values (LOV)

Many fields only accept codes from a defined List of Values (LOV). You can tell that a field has predefined values if the field name appears in DARK BLUE.

- Click on the down arrow beside the field to see the list of values.
- Double click in field (or press F9) and a list of acceptable values appear.
- Double click on correct value and it will be inserted into the field.

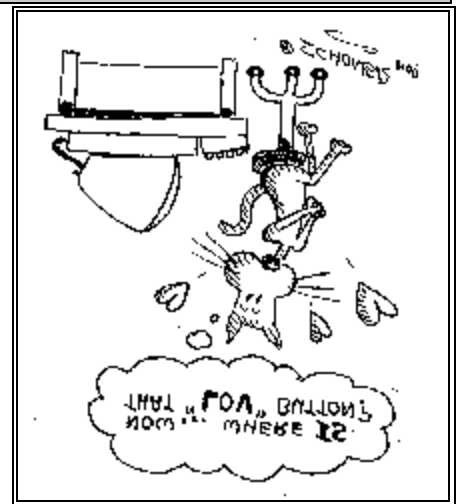


Figure 9 - CaTToon by Carl Schoner

### Searchable FIELDS

When a field has a down arrow next to it, you can click on the icon and display another form or window where you can search for a value or information related to the field. You can often select and return a value to the associated field.

### Function Keys vs. Mouse

Below is a list of function keys if you prefer these to using the mouse. Clicking on the Show Keys icon on toolbar will give this to you. The most common key strokes in Banner are:

Save (Commit) .....	F10
Next Block .....	Control + Page Down
Previous Block .....	Control + Page Up
Exit / Quit .....	Control + q
Delete Backward .....	Backspace
Next Item .....	Tab
Previous Item .....	Shift+Tab
Cancel .....	Esc key
Help .....	F1

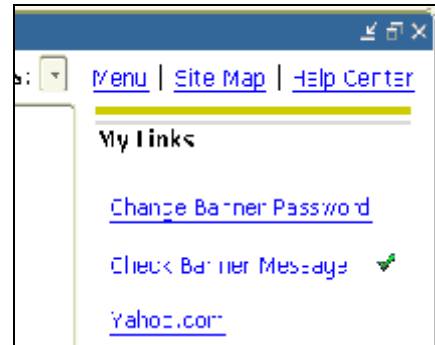
Display Error .....	Shift+F1
Clear Query .....	F7
Execute Query .....	F8
Insert Record .....	F6
Next Record .....	Down arrow
Previous Record .....	Up Arrow
Rollback .....	Shift + F7
Go to box .....	F5
Print .....	Shift + F8

# Customizing Banner

## My Links

A brand new section called “My Links” is available from the main menu in Banner. You can customize many things in this section.

- ! The first link under the “**My Links**” section is a link so you can easily **change your Banner password** (GUAPSWD). This will be a nice link to have since we need to change our passwords every 90 days.
- ! The second link is “**Check Banner Message**” which takes you to GUAMESG. This is the form that is used for rejection notifications for RQ’s. **NEW FEATURE:** A green check mark appears next to the link when you initially log in and have pending messages, or when ever a new message arrives. **The pop up alert for new messages is no longer displayed!**



## Customizing Personal Links

Display options, screen colors, personal links and “my institution” can be customized to your liking. To edit these preferences, either click on “Personal Link (1-6)” or go to form **GUAUPRF** (user preferences).

## Display Options Tab

### Display Options:

- ! Under the **Display Options** tab you have the option to customize what displays on the menu and title bars.

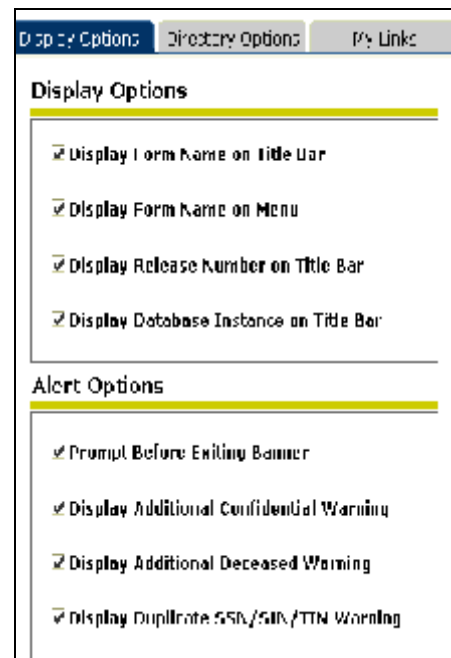
### Alert Options:

New alert options enable you to customize how you are prompted by Banner for the following:

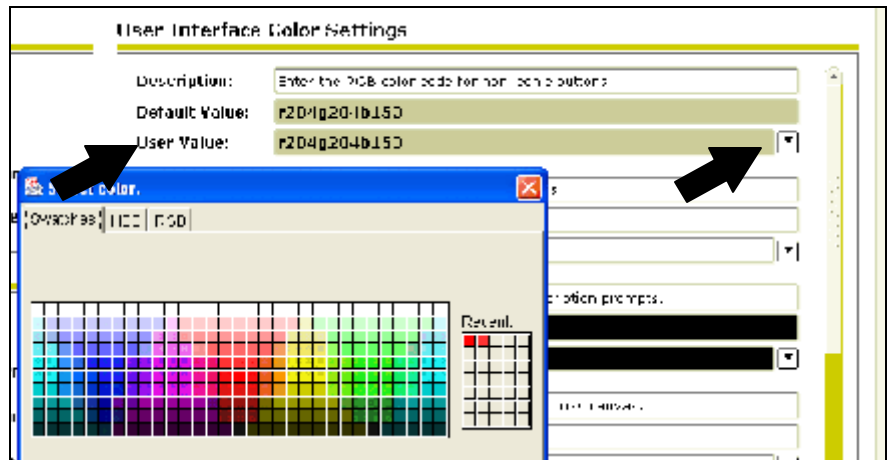
- ! **Prompt Before Exiting Banner** - Check this box if you want Banner to verify that you want to quit your Banner session.
- ! **Display Additional Confidential Alert** - Check this box if you want Banner to display an extra Confidential message for records that contain confidential information.
- ! **Display Additional Deceased Alert** - Check this box if you want Banner to display an extra Deceased message for records associated with a deceased person.

### User Interface Color Settings:

You can customize Banner’s appearance! You can change the color of buttons, canvas (background space) of all forms, record highlighting, scroll and separator bars, and the canvases (backgrounds) within the main menu. To change a color:



- ! For each item you see three things: a description, the default value and the user value.
- ! Find the item you want to change by looking at the description, such as the first item, the non iconic buttons (such as "cancel" and "ok").



- ! Click on the down arrow for **user value**. A "select color" box appears. Select the color that you like for that option and click on OK.
- ! Click the **Save** icon, or press F10. Once you have saved the change, it immediately takes affect.
- ! **To remove a color**, or go back to the default color, click in the User Value field and click on the Remove Record icon (the 5<sup>th</sup> icon from the left). Click on Save, or F10.



*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 that you work with the default color settings for a little while to get used to the new displays before you begin to make any changes.

## My Links Tab

You can edit the "My Institution" link as well as the personal links. The personal links can either be web pages or links to banner forms. To edit these, click on the "My Links" tab.

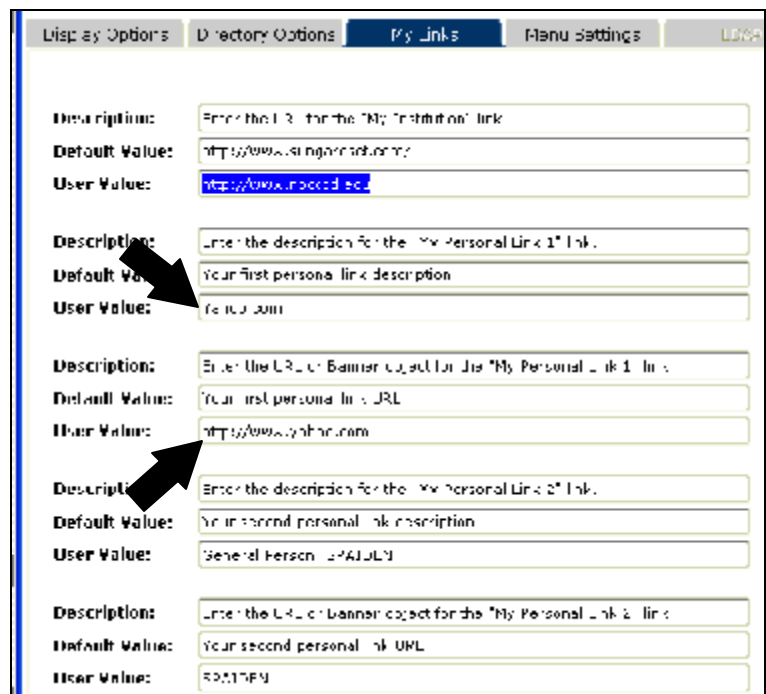
### My Institution:

- ! The first item listed is the "**My Institution**" link. The default value for this is the SungardSCT website.
- ! Click in the User Value and put in the District or College website. In this example, I put in the District website. Make sure you remember the "http://" before the www!

### Personal Links

There are two steps for editing the personal links. First you put in a description then you put in the link.

- ! Enter a description in the User Value under **Enter the description for the "My Personal Link 1" link**.  
Example: Yahoo.com
- ! Enter in the URL or form name



under **Enter the URL or Banner object** for the “My Personal Link 1” link.

Example: <http://www.yahoo.com>

- ! When done editing your links, click on Save or press F10.
- ! The actual links will work as soon as you save the changes you made. **However, the link descriptions will not appear until you have exited and re-entered Banner.**
- ! You can have up to 6 personal links.

## New Help Center Link

The Online Help system contains information about forms and fields in Banner. The help system runs in a separate browser. There are three ways to access Online Help in Banner.

- ! Click on Help on the menu bar. Then click on Online Help.
- ! Click on the Online Help icon on the toolbar.
- ! Click on the Help Center link located above the “My Links” section of the main menu.

## Features of Online Help

Banner 7 features a new Online Help system that contains information about forms and fields, as well as tasks you can perform with Banner. This system runs in a web browser and is available by clicking on the **Online Help toolbar icon** or by selecting the Online Help option from the **Help pull-down menu**.

### Accessing Online Help from a Form

The Online Help button and Help menu option will initially display information about the form you are working in. For example, if you are working in the SPAIDEN form and you click on the Online Help, the Help Center will open with information about SPAIDEN already in the help window.

### Accessing the Help Center

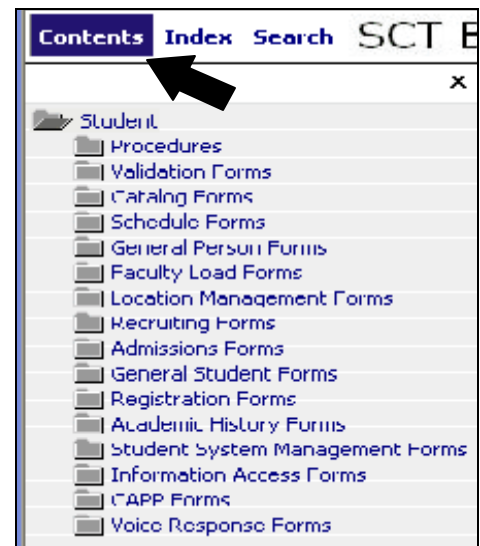
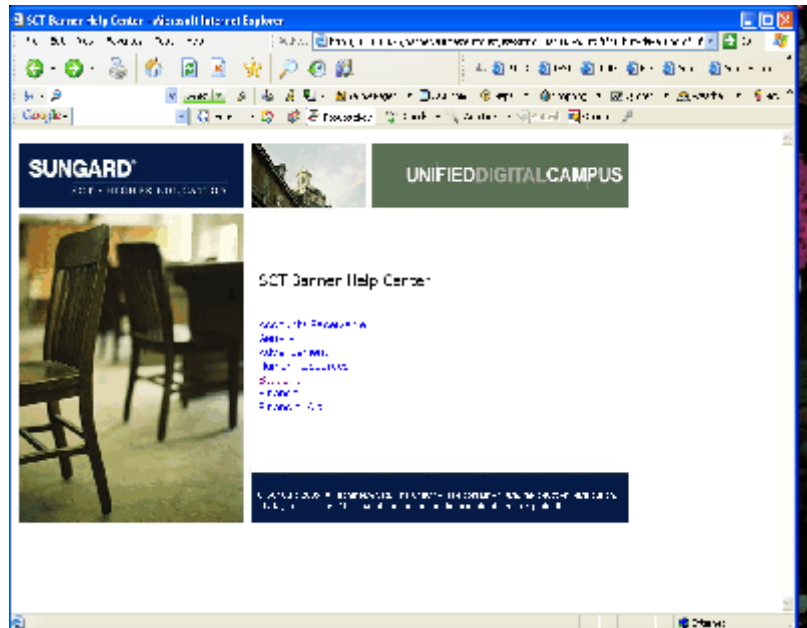
If you want information about forms and tasks for another Banner system, use the **Help Center link**, which is available from the main menu of Banner, or from anywhere within the Help System. A separate internet explorer window will open to the main Banner Help Center. You will see the main systems listed. Click on the Banner System that you want help with.

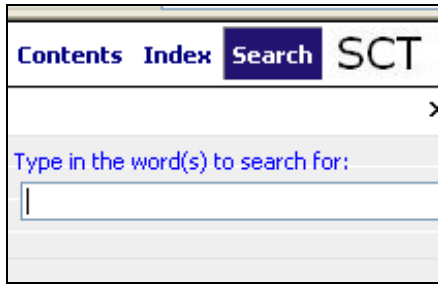
### Features of Online Help

You can **browse**, **search** and use the **index** to located topics in online help.

### Browsing for Topics

The **Contents tab** enables you to browse for topics. Form and field information is organized by Banner module. Task information is contained under the Procedures heading.





### Searching for Topics

The **Search tab** allows you to search for topics within the Help System. You can also use your browser's "search on page" feature to find specific text on a help page (from the Edit menu, select "Find on this page").

### Using the Index

The **Index tab** provides an alphabetical listing of topics within the help system. When you enter the letters of what you are looking for, the index will scroll through the topics to the closest alphabetical match.

### Using the Field Link

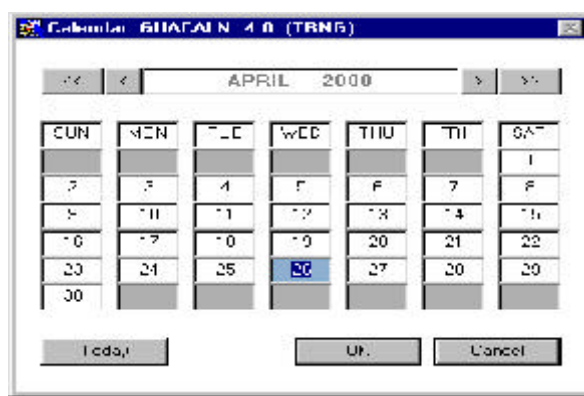
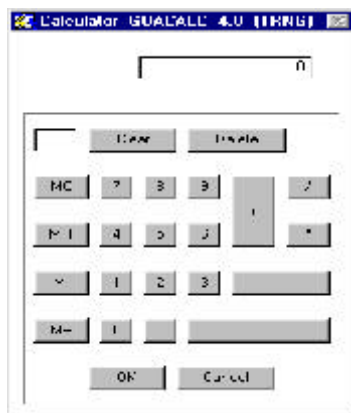
Many form descriptions are quite long, so sometimes you will find a link that goes to the field descriptions on a separate page.



## Other Helpful Tools

### Calendar and Calculator

- **Calendar:** Any field that requires a date will have a Calendar Icon next to it. Click on the icon to bring up the calendar. You can also click on "Help" on the Menu Bar - select Calendar
- Click "Help" on the Menu Bar - select **Calculator**. You can also double click in a numerical field.
- When finished click OK to return Date or Numeric Calculation to field you were in.



## Training Handouts

If you need extra copies of any of our training material, or would like additional training material, please visit our website! Click on the link for the training material you want. We update this list as needed, so check back every once in a while!

<http://www.nocccd.edu>

- Click on **DEPARTMENTS**
- Click on **INFORMATION SERVICES**
- Click on **TRAINING MANUALS**

Or type in the following: <http://www.nocccd.edu/Departments/InfoServices.htm#BannerTrainingManuals>

### **Navigation:**

- Basic Navigation Training Manual
- Banner Navigation Q-card
- Data Standards Q-card
- Data Standards

### **Finance:**

- Budget Transfers Manual
- Requisition Training Manual
- Searching for RQs
- Finance Budget Forms and Reports

### **Banner 7:**

- Customizing Basic 7