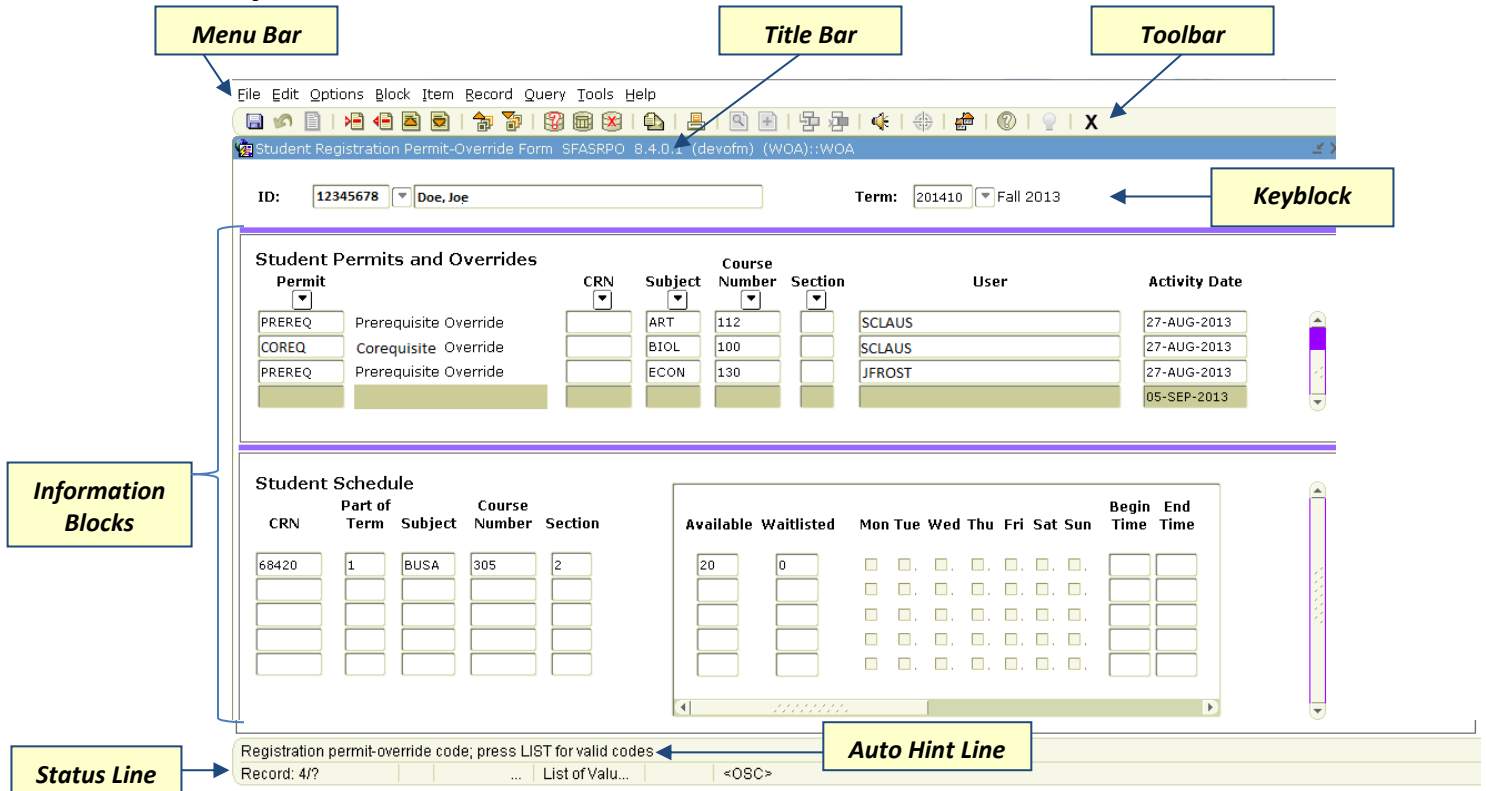


# Banner Basics

## AATN Conference 2013

Banner is the University of Hawai'i's integrated student information system utilized by all 10 campuses. This complex software application uses a shared common database that is accessed by students, staff, faculty, administrators, and external systems such as STAR and Laulima. Banner's user interface consists of a series of forms and tables with varying levels of access, depending on the user's campus affiliation and responsibilities.

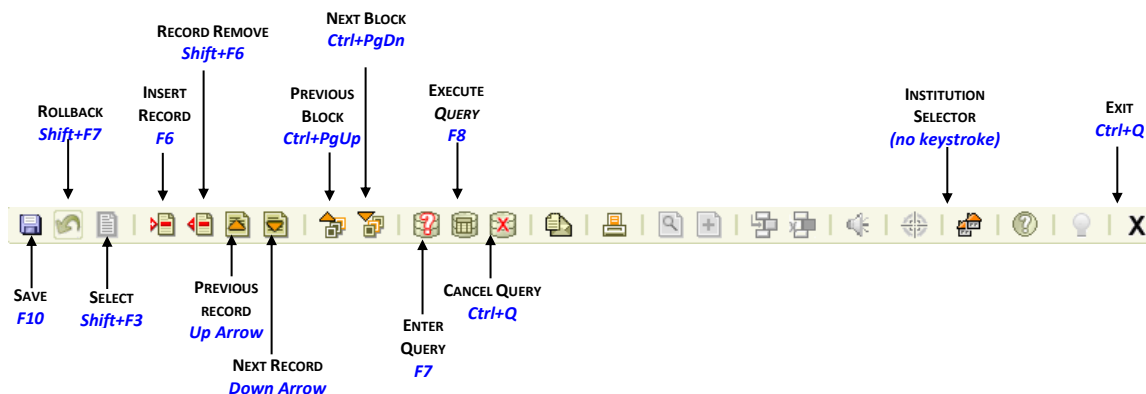
### Anatomy of a Form



**Menu Bar** – Provides an alternate method of navigation

**Title Bar** – Displays the title and seven-character name of the form, table, job, or report

**Toolbar** – Set of icons that represent shortcuts for common Banner functions (*italicized text* represents corresponding keystrokes)



**Key Block** – Parameters that determine what will be displayed or accessible in the information block(s)

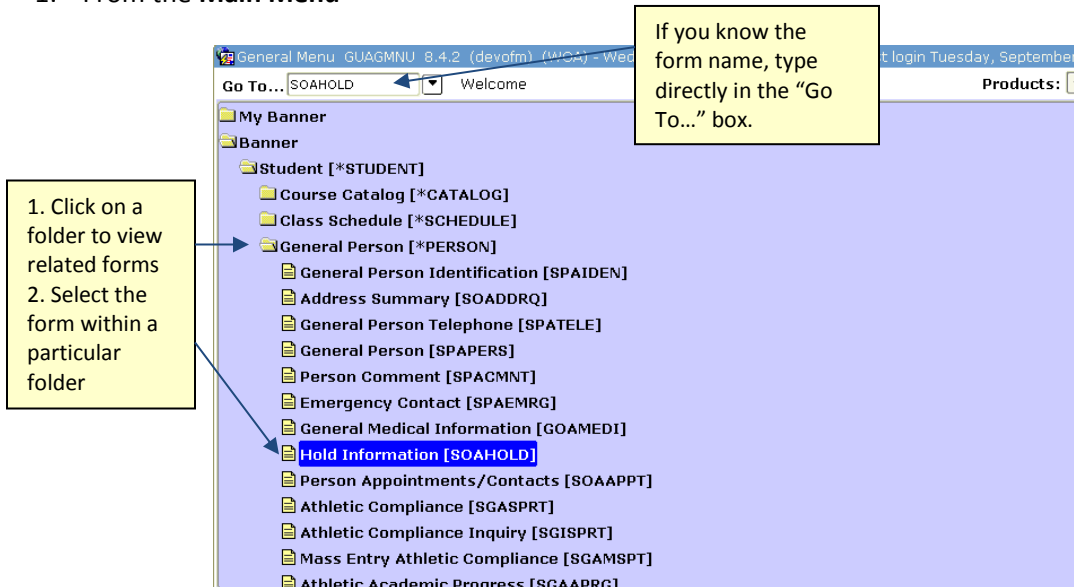
**Information Blocks** – Areas that display data or allow for data entry

**Status & Auto Hint Lines** – Provides information pertaining to the field where the cursor is located, which may include:

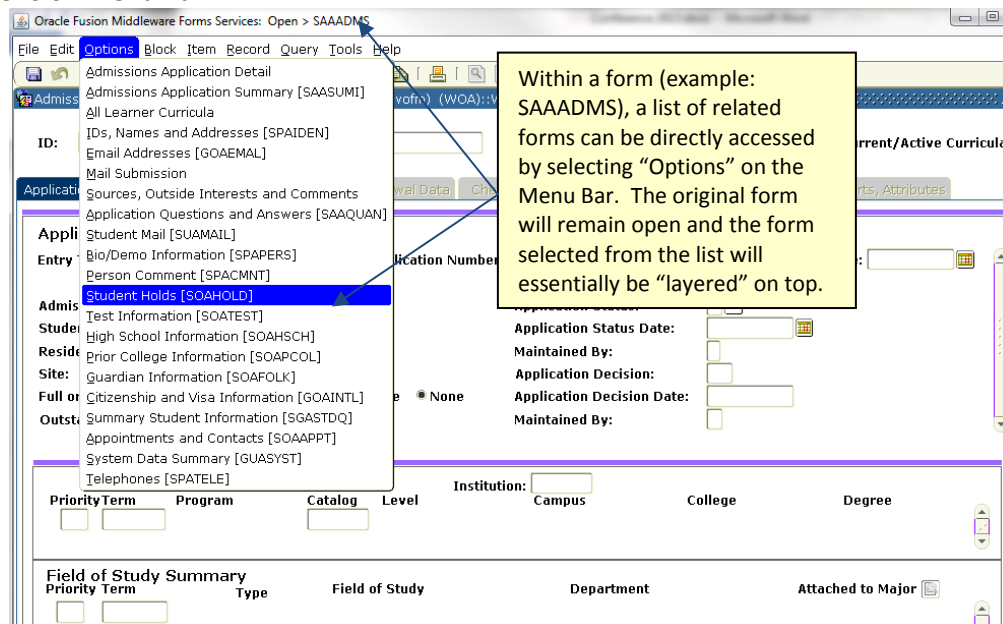
- Brief description of the field
- Errors or processing messages
- Access to related windows or forms

## Forms Access

### 1. From the Main Menu



### 2. Options on Menu Bar



### 3. Direct Access via File on Menu Bar

File Edit Options Block Item Record Query Tools Help

Admissions Application Form [UH:8.5.3:1] SAAADMS (devofm) (WOA)::WOA

Go To... SOAHOLD My Institution

ID: [ ] [ ] View

Application Curricula Fees, Mail Submission Resources, Interests, Comments Contacts, C

Application

Entry Term: [ ] Application I

Within a form (example: SAAADMS), you can go directly to another form by selecting "File" → "Direct Access" on the Menu Bar (or keystroke F5). Type in the name of the form and it will be "layered" on top of the original form.

## Data Fields

### 1. Properties

Each data field in Banner has its own unique set of properties. Some allow the user to enter info, others may not; some will accept only certain entries (validating the entered text against a table) while others allow for free text; some are required to be populated (to save the form) while others are optional.

Hold Information Form [UH:8.2:1] SOAHOLD (devofm) (WOA)::WOA

ID: 12345678 Doe, Joe

Upon saving the form, some fields will auto populate based on the users profile. These fields cannot be manually populated.

Hold Details

Institution: WOA University of Hawaii West Oahu

Hold Type: AC Academic Advising Hold

Reason: Mandatory Advising

Amount: [ ] From: 11-SEP-2013 To: 31-DEC-2099

Release Indicator: UHSTAFF

Origination Code: DADV UHWO Acad Advising 689-261

Optional fields do not need to be populated to save a form.

Free-text fields allow the user to enter text freely and do not validate against a table.

An arrow [ ] next to the field indicates that there is a predetermined list of values (validation tables) that are acceptable entries for the field.

Date fields have a calendar icon that, when clicked, will display a calendar where the user can select the desired date. User can also enter the date directly into the field, if they follow the standard Banner date format, DD-MON-YYYY.

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

## 2. Query

Some Banner fields allow the user to perform a query for specific values (e.g. view only ENG classes).

- A. Initiate query - keystroke F7 or use the Menu Bar, Query →Enter
- B. Enter query - Enter desired text in the field. For a match to be found, the text must match exactly, character by character. For this reason, it is recommended that the wild card (%) be used to increase the likelihood that the desired student will be displayed. The % (percent sign) represents any (groups of) letter(s), number(s), or symbol(s).

Example:

- Students name is Mary Anderson. User may want to query by entering Mary% Anders%n%. This will ensure Mary **Jane** Anderson, Mary-**Jane** Andersen, Mary Anderson-**Smith**, etc. will be included in the returned population.

- C. Execute query - keystroke F8 or use the Menu Bar, Query →Execute

## 3. Definition

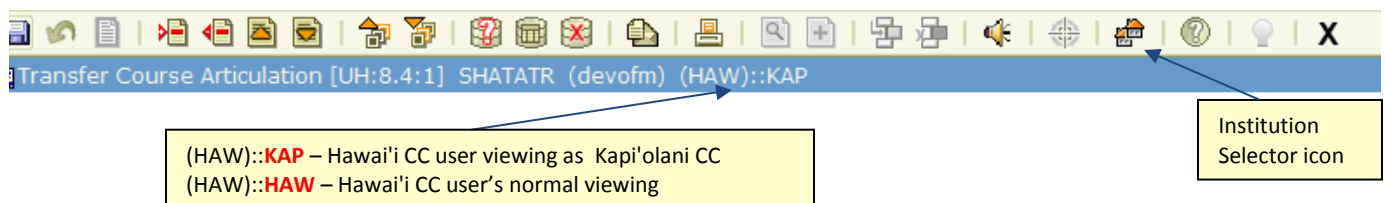
Dynamic Help Query is a built-in feature that provides additional information about a particular field. Information may include: value key (e.g. AC – Accepted, DN – Denied) and/or how the field is used

- A. Place cursor in the desired field. If it is not a clickable field, first perform an Enter Query function (F7), which should blank out all fields.
- B. On Menu Bar, Help → Dynamic Help Query
- C. A GUAHELP pop up will appear.

Select the “Local” or “Banner” radial button and then “Display” to view the definition. It is recommended that both entries be checked as one may contain more information.

## Institution Selector

Some Banner forms allow the user to change their campus affiliation, enabling the user to view the form from the perspective of another UH campus. To do so, click on the **Institution Selector** icon and select the desired UH campus from the drop down. (If the icon is grayed out, this feature is not available on the form.) The selected UH campus will now appear on the title bar enabling the user to view the form as that campus.



There are security features in place so users cannot edit another campus' records. However, if the **Institution Selector** feature is used, it is recommended to always check the title bar and reset if needed.

## Commonly Used Forms by Advisors

**SSASECQ** Schedule Section Form – Search for classes using any (combination of) value(s) on the form. Users may also choose to use Class Availability (<http://myuhinfo.hawaii.edu/page/checkclass.html>) or have the student search for classes within MyUH.

1. Enter Term code and any combinations of values. Wildcards (%) and greater and less than symbols (>, <) can be used. *When executed, the example below will display all fall 2013 Mānoa ENG courses starting with the number "2" that has at least one available seat.*
2. Once values are entered, "F8" to execute the query.

The screenshot shows a search form with the following fields and values:

- Institution:** MAN
- Term:** 201410
- Part of Term:** (empty)
- Registration From:** (empty)
- Registration To:** (empty)
- CRN:** (empty)
- Block Schedule:** (empty)
- Subject:** ENG
- Course:** 2%
- Section Status:** (empty)
- Campus:** (empty)
- Course/Section Title:** (empty)
- Schedule Type:** (empty)
- Instructional Method:** (empty)
- Duration:** (empty)
- Unit:** (empty)
- Enrollment:** Maximum [ ] - Actual [ ] = >0
- Waitlist:** Maximum [ ] - Actual [ ] = [ ]

Additional options include: Link, Cross List, Reserved Seats, Long, Syllabus, Comments, and checkboxes for enrollment and waitlist.

**SOAHOLD** Hold Information Form – View (add or remove, if authorized) holds that may affect a student’s ability to register for classes.

The screenshot shows two hold entries:

**Hold 1:**  
**Institution:** WOA University of Hawaii West Oahu  
**Hold Type:** AC Academic Advising Hold  
**Reason:** Mandatory Freshmen Advising  
**Release Indicator:** UHSTAFF  
**Amount:** (empty) **From:** 18-SEP-2005 **To:** 01-MAY-2006 **Origination Code:** B90 Counseling Center 956-3455

**Hold 2:**  
**Institution:** SYSTEM  
**Hold Type:** FO Financial Obligation Hold  
**Reason:** Spring 2013 Complete Withdraw  
**Release Indicator:** UHSTAFF  
**Amount:** 2,187.21 **From:** 18-SEP-2013 **To:** 31-DEC-2099 **Origination Code:** DFAO UHWO Fin Aid Office 689-268

**SHATATR** Transfer Course Articulation – View how a campus has equated external courses in transfer. Users may also view these equivalencies at the system site, <http://www.hawaii.edu/transferdatabase/>.

The screenshot shows the SHATATR form with the following sections:

**Trans Inst:** 4352 Hawaii Pacific University **Program:** (empty) **Default Institution:** (empty)

**Transferring Course:**  
**Group:** (empty) **Primary:** (empty) **Subject:** WRI **Course:** 1200 **Title:** Rsch, Argmt and Writing **Term:** 000000 **Equivalent Exists:** Yes  
**Level:** UG **Status:** AC **Grade:** D **Minimum:** 3.000 **Transferred Credits:** 3.000 **Protect from Import:** (empty)  
**Converted:** 3.000 3.000

**Equivalent Course:**  

And	Or	Left Parenthesis	Subject	Course	Title	Catalog Low	Catalog High	Credits Used	Right Parenthesis
*			ENG	100	Composition I			3.000	
			ENG	101	Composition IA			3.000	

**Equivalent Course Attributes:**  
**Code:** FW **Description:** Foundations: Written Comm

**Equivalent Course Comments:**  
 10/01/01 Reviewed by Division Chair Jones

**SZAEVOL** Educational Goal Maintenance – View a student’s immediate and long-term educational goals as well as their career interest. Students are prompted to update this information every term through the MyUH portal.

<b>Ed Goal Immed:</b>	BASS1	Earn an associate degree	<b>Term Code:</b>	201330	Spring 2013
<b>Ed Goal High:</b>	BASS2	Earn an associates degree (2-yr)	<b>Home Inst:</b>	KAP	
<b>Ed Goal Inst:</b>	HCMP	My Home Campus	<b>User ID:</b>	WWW_USER	
<b>Career Interest:</b>	HEAL	Health Science (medicine,dentistry,pharmacy,nursing,phy	<b>Activity Date:</b>	02-APR-2013 09:37:32 AM	
<b>Pre-Major:</b>	HLTH	Pre-Health Sciences 2yr (e.g.: Assoc Deg Nursing, Medical Asst, Occup Therapy Asst, etc.)			

**SFAREGS** Student Course Registration Form – For special populations, advisors may elect to “manually” register students via Banner. Note that registration using SFAREGS will bypass any time tickets that may restrict the student from registering themselves through MyUH.

Term: 201410 ID: 12345678 Smith, John D. Date: 04-SEP-2013 Holds:

View Current/Active Curricula Print Bill Print Schedule

Registration Student Term Curricula Study Path Time Status

**Enrollment Information**

Status: EL Registered-Eligible to Reg Process Block:  Minimum: .000 Mhrs Source:  Confirmed  None  Accepted

Reason:  Status Date: 09-APR-2013 Delete All CRNs Maximum: 18.000 Mhrs  Accepted

**Course Information**

Institution	CRN	Subject	Course	Section	Mode	Grade	Credit Hours	Bill Hours	Attempted Hours	Status Hours	Status Level	Appr Recd	Override	Part of Term	Method of Instruction	Campus	
WOA	68034	BUSA	305	1	L	L	.000	.000	.000	.000	DO	UG	<input type="checkbox"/>		1	DCO	OC
WOA	68132	ICS	101	2	L	L	3.000	3.000	3.000	3.000	RW	UG	<input type="checkbox"/>		1	DCO	OC
WOA	68130	HUM	300	1	L	L	3.000	3.000	3.000	3.000	RW	UG	<input type="checkbox"/>		1	DCO	OC
WOA	68426	ACC	201	3	L	L	3.000	3.000	3.000	3.000	RW	UG	<input type="checkbox"/>		1	DCO	OC
WOA	68146	MATH	103	2	L	L	3.000	3.000	3.000	3.000	RW	UG	<input type="checkbox"/>		1	DCO	OC
WOA	68096	ENG	200	2	L	L	.000	.000	.000	.000	WL	UG	<input type="checkbox"/>		1	DCO	OC
LEE	53326	PSY	240	0	L	L	3.000	3.000	3.000	3.000	RE	UG	<input checked="" type="checkbox"/>		1		LEE

Error Flag: In Progress Status Type: In Progress

Fees: Y - Immediate assessm... Date: 04-AUG-2013 Credit Hours: 12.000 Bill Hours: 12.000 CEU Hours: .000

**SFASRPO** Student Registration Permit-Override Form – If authorized to do so, advisors may grant overrides to students. These overrides may include prerequisite/co-requisite requirements, closed classes, and time conflicts.

Permit	CRN	Subject	Course Number	Section	User	Activity Date
PREREQ		ANTH	151		UHSTAFF	27-AUG-2013
CAPACITY	68095	ENG	200	1	UHSTAFF	24-SEP-2013

## Resources

**BWIKI** (<https://www.hawaii.edu/bwiki/dashboard.action>) – contains a wealth of Banner-related *How Tos*, guidelines, and historical information.

**IT Status page** (<http://www.hawaii.edu/its/status.php>) – view current/planned ITS outages, alerts, announcements that affect computing services across the system, included Banner.

**MyUH login page** (<https://myuh.hawaii.edu/cp/home/displaylogin>) – provides links to view the registration timetable, MyUH tutorials, and Class Availability.

## Contacts

**Password Resets** - [Banner-reset@lists.hawaii.edu](mailto:Banner-reset@lists.hawaii.edu)

**General Banner Help** - [Banner-help@lists.hawaii.edu](mailto:Banner-help@lists.hawaii.edu)

**ITS Help Desk** – 956-6168 (neighbor islands (800)558-2669) or [help@hawaii.edu](mailto:help@hawaii.edu)