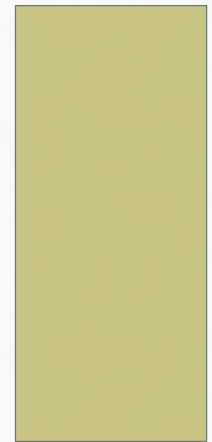
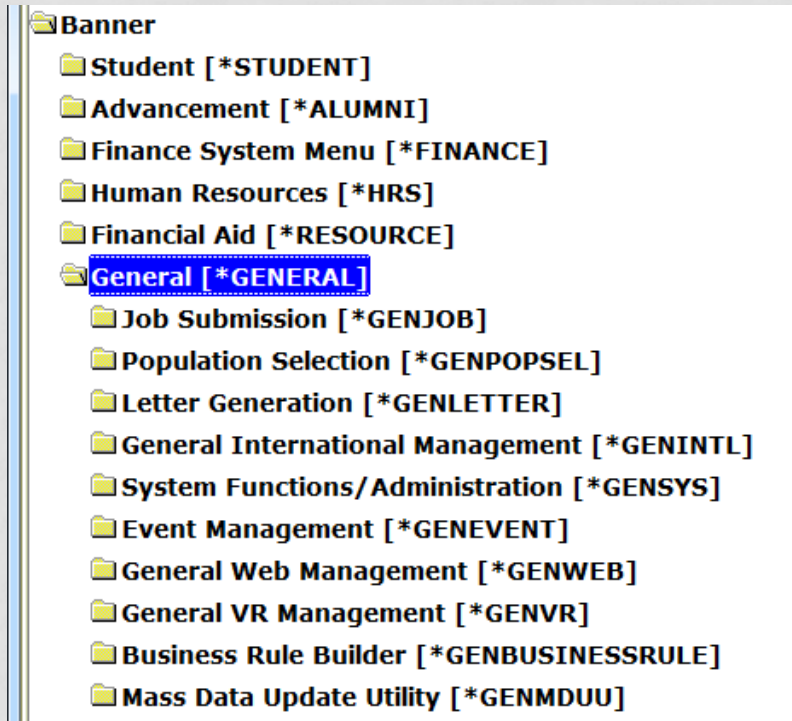


# NAVIGATING BANNER FORMS



# FORMS NAVIGATION

- Data is entered into Banner using a series of forms
- Banner forms are organized by process into a nested menu folder



# FORM NAVIGATION

- Forms naming conventions
  - 7 character names (SPAIDEN)
    - Character 1 = Banner product
      - **A** – *Advancement*
      - **F** – *Finance*
      - **G** – *General*
      - **N** – *Position Control*
      - **P** – *Human Resources/Payroll*
      - **R** – *Financial Aid*
      - **S** – *Student*
      - **T** – *Accounts Receivable*

# FORM NAVIGATION

- Forms naming conventions
  - 7 character names (SPAIDEN)
    - Character 2 = application module
      - A – Admissions
      - C – Catalog
      - E – Support Services
      - F – Registration/Fee Assessment
      - G – General Student
      - H – Grades/Academic History
      - I – Faculty Load
      - P – Person
      - R – Recruiting
      - S – Schedule
      - T – Validation form/table
      - U - Utility

# FORM NAVIGATION

- Forms naming conventions
  - 7 character names (SPAIDEN)
    - Character 3 – type of form
      - A – Application
      - B – Base Table
      - I – Inquiry
      - P – Process
      - R – Rule, repeating, report
      - V – Validation
      - M - Maintenance

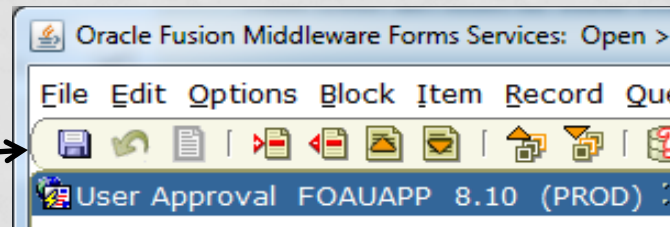
# FORM NAVIGATION

- Forms naming conventions
  - 7 character names (SPAIDEN)
    - Character (4 – 7) – unique 4 char code for the form
      - IDEN – Identification
      - PINC – Position Incumbent
      - STDN – Student Relation
      - PERS - Person

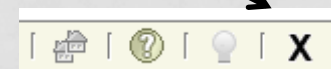
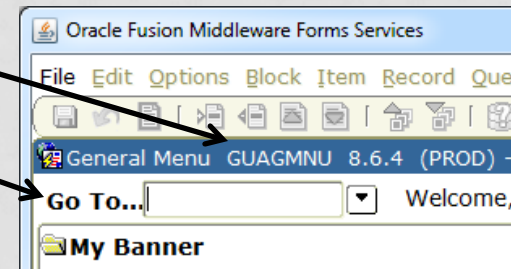
# FORMS NAVIGATION

- Components needed for form navigation

- Menu bar
- Toolbar



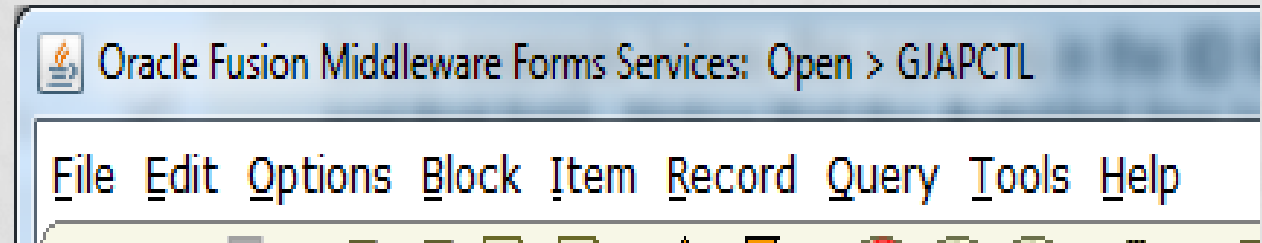
- Identifying a form
- Selecting a form
- Closing a form



# FORM NAVIGATION

## Menu bar

- File
- Edit
- Options
- Block
- Item
- Record
- Query
- Tools
- Help








# FORM NAVIGATION

## Toolbar icons



(Grouped by function)

- The first block contains the following icons:

- Save 
- Rollback 
- Select 

# FORM NAVIGATION

## Toolbar icons

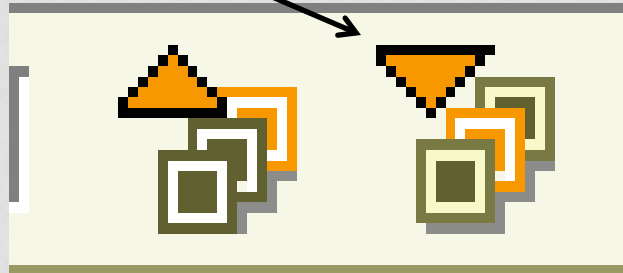
- The second block contains the following icons:
  - Insert record – adds a new record in the form
  - Remove record – removes the current record
  - Previous record – navigates back to the previous
  - Next record – navigates forward to the next record



# FORM NAVIGATION

## Toolbar icons

- The third block contains icons for working with and navigating between blocks.
  - Previous Block
  - Next Block - populates blocks with data on a form



# FORM NAVIGATION

## Toolbar icons

- The fourth block contains query icons
  - Enter query
  - Execute query
  - Cancel query



# FORM NAVIGATION

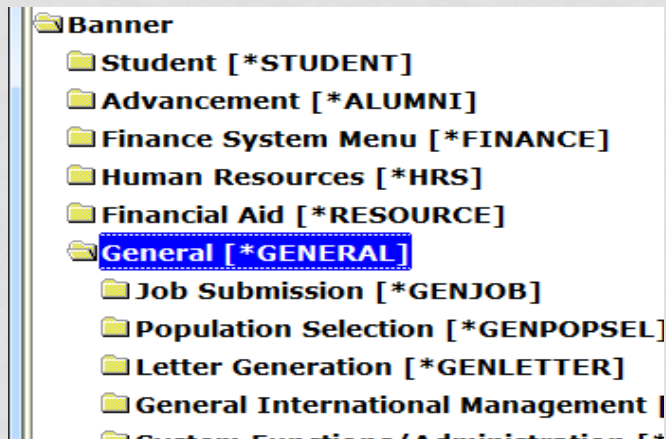
## Toolbar icons

- The remaining icons:
  - View/Send Message
  - Print (printer icon)
  - BDM display document (magnify glass) – doc scanning
  - BDM add document (green plus sign) – doc scanning
  - Submit workflow
  - Workflow release
  - Broadcast message (speaker)
  - Fine grained access security (target)
  - Exit (X)

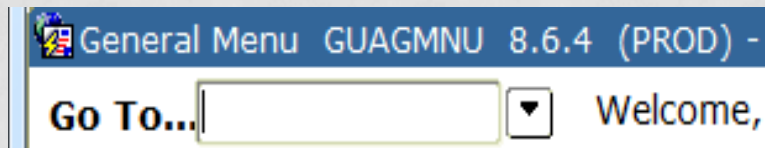


# FORM NAVIGATION

- There are two ways to **select a form**
  - Clicking through the sub-folder hierarchy

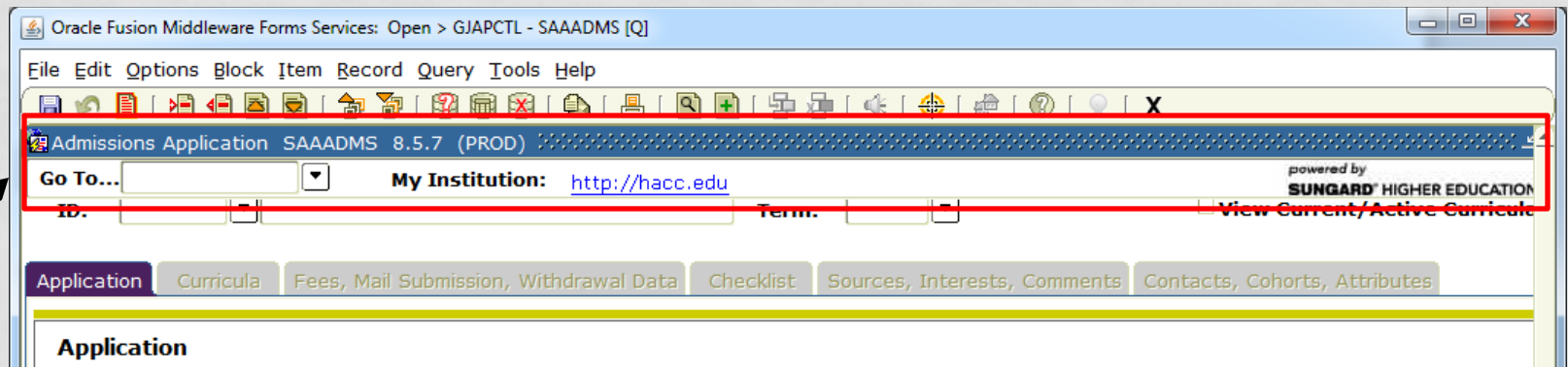


- Entering the form name in the "Go To" field



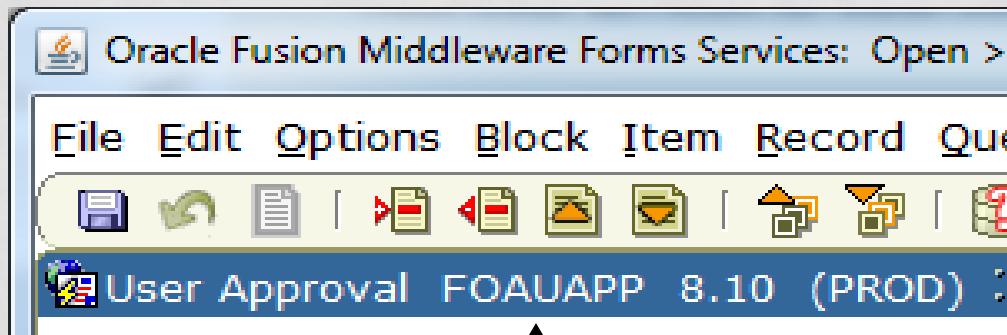
# FORM NAVIGATION

To navigate between forms quickly, you can press the **F5 key** while any form is open; the "Go to" box will appear allowing you to navigate to another form instantly. Pressing F5 again will close the "Go to" box.



# FORM NAVIGATION

- When you select a form an easy way to **identify a form** is to look for the form name



Form Name is "FOAUAPP"





# FORM NAVIGATION

## Components of a Form

Key Block →

Tab →

Block →

Block →

**Note:** Blocks are separated by yellow bars

The screenshot shows a web-based form titled "Admissions Application SAAADMS 8.5.7 (PROD)". At the top, there are input fields for "ID:" and "Term:" and a checkbox for "View Current/Active Curricula". Below this is a horizontal tab bar with several tabs: "Application" (highlighted), "Curricula", "Fees, Mail Submission, Withdrawal Data", "Checklist", "Sources, Interests, Comments", and "Contacts, Cohorts, Attributes".

The main form area is divided into several sections by yellow horizontal bars:

- Application Section:** Contains fields for "Entry Term:", "Application Number:", "Application Preference:", and "Application Date:". Below these are two columns of fields: "Admission Type:", "Student Type:", "Residence:", "Site:", "Full or Part Time:" (with radio buttons for "Full Time", "Part Time", and "None"), and "Outstanding Requirements:". The second column includes "Application Status:", "Application Status Date:", "Maintained By:", "Application Decision:", "Application Decision Date:", and another "Maintained By:" field.
- Curricula Summary Section:** A table with columns: "Priority Term", "Program", "Catalog", "Level", "Campus", "College", and "Degree".
- Field of Study Summary Section:** A table with columns: "Priority Term", "Type", "Field of Study", "Department", and "Attached to Major".

At the bottom of the form, there is a status bar with the text: "ID number, press LIST for name/ID search form; DUPLICATE ITEM for Alternate ID look-up; INSERT RECORD to add Record: 1/1" and navigation buttons like "<OSC>".

# FORM NAVIGATION

## Key Block ID Search using person search

Click icon

Person Search

The screenshot displays the 'Admissions Application SAAADMS 8.5.7 (PROD)' interface. At the top, there are input fields for 'ID:' and 'Term:'. Below these are several tabs: 'Application', 'Curricula', 'Fees, Mail Submission, Withdrawal Data', 'Checklist', 'Sources, Interests, Comments', and 'Contacts, Cohorts, Attributes'. The 'Application' tab is active, showing a form with various fields: 'Entry Term:', 'Admission Type:', 'Student Type:', 'Residence Site:', 'Full or Part Time:' (with a radio button for 'Full Time'), and 'Outstanding Requirements:'. A 'Person Search (SOAIDEN)' option is highlighted in a blue box, with an arrow pointing to it from the 'Person Search' text on the left. Below the form are two summary sections: 'Curricula Summary' with columns for 'Priority Term', 'Program', 'Age', and 'Degree'; and 'Field of Study Summary' with columns for 'Priority Term', 'Type', 'Field of Study', 'Department', and 'Attached to Major'. A 'Cancel' button is located between the two summary sections. At the bottom, a status bar contains the text: 'ID number; press LIST for name/ID search form; DUPLICATE ITEM for Alternate ID look-up; INSERT RECORD to add Record: 1/1 <OSC>'. The 'Click icon' text on the left points to a small icon in the 'ID:' field, and the 'Person Search' text points to the 'Person Search (SOAIDEN)' option.



# FORM NAVIGATION

- Additional wildcards that can be used

`%gel%`

- Returns any value which has "gel" within it (Maggellon)

`Gel%`

- Returns any value which begins with "gel" (**g**elatin)

`%gel`

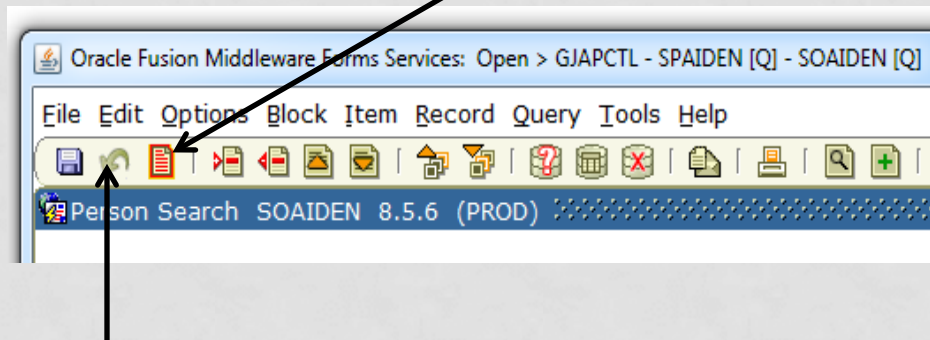
- Returns any value which ends with "gel" (an**g**el)

`_o%`

- Returns any value where the second letter is "o" (J**o**hn)

# FORM NAVIGATION

- Using the “people search” form lookup
  - Select a person from the records returned
    - Select a person “Anna Miller” by:
      - Doubling clicking on the person’s ID (double mouse click)
      - Click the ID and click the “**select**” icon



- Click “**rollback**” to select another person

# FORM NAVIGATION

Click "next block" to populate the block(s) below with Anna Miller's data

The screenshot shows the SAAADMS application interface. At the top, there is a menu bar with options: File, Edit, Options, Block, Item, Record, Query, Tools, Help. Below the menu is a toolbar with various icons. The main window title is "Admissions Application SAAADMS 8.0.1".

The main form area contains the following fields and sections:

- ID:** A00010302 (highlighted with a red box) | Miller, Anna
- Term:** [Dropdown]
- View Current/Active Curricula:** [Link]
- Application Entry Term:** [Dropdown]
- Application Number:** [Input]
- Application Preference:** [Input]
- Application Date:** [Calendar]
- Admission Type:** [Dropdown]
- Student Type:** [Dropdown]
- Residence:** [Dropdown]
- Site:** [Dropdown]
- Full or Part Time:**  Full Time  Part Time  None
- Outstanding Requirements:**
- Application Status:** [Dropdown]
- Application Status Date:** [Calendar]
- Maintained By:** [Input]
- Application Decision:** [Input]
- Application Decision Date:** [Calendar]
- Maintained By:** [Input]

A tooltip message is displayed over the form:

You have successfully used the Search icon to find a Banner ID.  
Click [here](#) to continue.

The form also includes two summary tables:

Curricula Summary						
Priority	Term	Program	Catalog	Level	Campus	Degree
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>			

Field of Study Summary				
Priority	Term	Type	Field of Study	Department
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	