Creighton University uses several of the SCT Banner modules, including Finance, Student and Financial Aid. An integrated system requires a great deal of communication and cooperation between each office that is entering, maintaining, and querying data. It is important that you receive the appropriate training and understand the data standards.

**USING THIS GUIDE**

This guide provides step-by-step instructions for each exercise. Anything that you are supposed to type or select is noted with various types and colors. Icons you are to click are represented graphically.

<table>
<thead>
<tr>
<th>When you see this...</th>
<th>You do this...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click Help</td>
<td>Click the left mouse button once on Help from the menu bar.</td>
</tr>
<tr>
<td>Select Show Keys</td>
<td>Click the left mouse button once on the words Show Keys. Select usually indicates a choice on a pull-down menu.</td>
</tr>
<tr>
<td>Type name</td>
<td>Type the name of the person from the keyboard.</td>
</tr>
<tr>
<td>Click the Next Block Icon</td>
<td>Click the left mouse button once on the icon shown</td>
</tr>
<tr>
<td>Double-Click in the field</td>
<td>Click the left mouse button twice in rapid succession.</td>
</tr>
<tr>
<td>Mark Male</td>
<td>Click the left mouse button once in the circle to darken it or in the box to create a check mark.</td>
</tr>
<tr>
<td>Press &lt;&lt;TAB&gt;&gt;</td>
<td>Press the Tab Key on the keyboard.</td>
</tr>
<tr>
<td><strong>NOTE:</strong></td>
<td>Important information that will assist you in using Banner.</td>
</tr>
<tr>
<td><strong>EX:</strong></td>
<td>This indicates there is an example of how you might use the function in daily work.</td>
</tr>
</tbody>
</table>

**Logging into Banner**

1. Open your **Internet Browser** (i.e., Internet Explorer)
2. Type **http://banprod.creighton.edu** in the address bar
   
   **NOTE:** The right column/frame houses important announcements such as when the system will be available.
3. Click on the **Banner 8 Forms (Windows) – Production Database [PROD]** link if you have a PC
   **-OR-**
   Click on the **Banner 8 Forms (MAC) – Production Database [PROD]** link if you have a MAC

4. A logon box should appear

5. In the **Username** field, type your **Username**

6. In the **Password** field, type your **Password**
   **Note:** The **Database** field is left blank

7. Click **Connect**
   **NOTE:** You will know that you have successfully logged into Banner when you see the Main Menu screen shown on the next page

**Password Changes**
Banner passwords expire every 90 days. Ten days prior to the expiration, you will receive an email from doit_official@creighton.edu informing you of the expiration. Messages will continue to be received until the password is reset or the password expires. The Banner password requirements are:

- Minimum of 8 characters
- Must contain at least 1 of each of the 3 requirements listed below:
  - Letters
  - Numbers
  - Special Characters which are restricted to ! % * + - : ? _
- Cannot be the same as the last 10 passwords
- Cannot be the same as the Banner ID

**NOTES:**
Menu Bar – contains pull-down menus of functions and commands that can be performed in Banner. If the Menu item is gray, the item is disabled for that particular form or condition.

Toolbar – holds the standard icons that allow you to access many standard functions and user documentation. Each Icon will be discussed later in detail.

Title Bar – shows the descriptive name, 7-character code name, version number, and database name.

My Links – provides access to helpful functionality as well as departmental websites that contain additional information and forms.

Banner Broadcast Messages – provides notification of planned or unplanned outages as well as other important system information that needs to be communicated. Banner clients are also registered for the appropriate Banner list servers.

Auto Hint – can contain the following information for the field where the cursor is located:
- Brief Field Description
- Error and processing message
- Keyboard equivalent

Status Line – can contain one or more of the following messages:

<table>
<thead>
<tr>
<th>Message</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Record n/n</td>
<td>Shows the number of the current record followed by the total number of records. If there are more records than fit in the window, the total appears as question mark, e.g. 3/?. You can scroll to see additional records.</td>
</tr>
<tr>
<td>&lt;List&gt;</td>
<td>Indicates if the field has a List of Values.</td>
</tr>
<tr>
<td>Enter Query</td>
<td>Indicates that the form is in query mode.</td>
</tr>
</tbody>
</table>

NOTES:
**MENU LAYOUT**
The Main Menu has two types of menus to access Forms, Jobs, Menus, and QuickFlows.

- **My Banner**
- **SCT Banner**

Menus are expandable and collapsible. You can double-click on the **appropriate menu title or the folder** on the left to expand the desired menu. Click on the **same menu title or the open folder** and the menu will collapse. Sub Menu Names are preceded with an asterisk *.  

**EX:** *SERVICES

---

**Form Names** are seven characters and have the following structure:

**EX:**  
- **SPAIDEN**  
  - Position 1: Identifies the primary system owning the form, report, process or table. In the first example, the “S” denotes Student System. In the second example, “F” denotes Finance System.  
- **FOIDOCH**  
  - Position 2: Identifies the application module owning the form, report, process or table. In the first example, “P” denotes Person. In the second example, “O” denotes Overall.  
- **Position 3:** Identifies the type of form, report, job or table. In the first example, “A” denotes Application. In the second example, “I” denotes Inquiry.  
- **Position 4 5 6 7:** Identifies a unique four-character name for the form. IDEN is Identification and DOCH is Document History.

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**NOTES:**

NAVIGATING BANNER

There are several ways to navigate through the Banner Screens. From the main menu you can access forms three ways: Menu options, Go To field, or Menu Bar.

Menu Options

1. Double-Click **My Banner** from the Main Menu
   
   **NOTE:** While there is a SCT Banner Menu and a My Banner Menu, you will find the My Banner is easier to use as it has been customized for you.

2. Double-Click on the form you want to open

Go To Field

1. Type the **7-Character Form Name or QuickFlow Name** in the **Go To** field

2. Press **<<ENTER>>**
   
   **NOTE:** Pressing the **up or down arrows** while in the **GoTo** field will allow you to scroll through the last 10 forms used.

Menu Bar

1. Click **File** on the Menu Bar

2. Select **one of the last 10 forms used**
   
   **NOTE:** This method only shows the forms that were previously used in the current session.

There are many other ways to navigate through Banner:

<table>
<thead>
<tr>
<th>QuickFlow</th>
<th>Access forms that are linked together via a workflow.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Icons</td>
<td>You can access another form or window related to the current record or field.</td>
</tr>
<tr>
<td>Right-Click Local Menu</td>
<td>Right-clicking on a form anywhere on a blank canvas will allow you to select various general options as well as form-specific options.</td>
</tr>
<tr>
<td>Object Search</td>
<td>Access a form, job or QuickFlow if you know part of the name, description or type.</td>
</tr>
<tr>
<td>Keyboard Shortcuts</td>
<td>You can use the keyboard to access a form, window, block or field through the use of Keyboard Shortcuts.</td>
</tr>
</tbody>
</table>
**USING THE TOOLBAR & KEYBOARD SHORTCUTS**

The Toolbar can navigate through Banner and perform most common functions. When you move your cursor over an Icon and pause, a yellow bubble appears with text that describes the function of that Icon. The corresponding keyboard shortcut is in the fourth column. Using keystrokes will improve your efficiency in the system.

<table>
<thead>
<tr>
<th>#</th>
<th>Icon</th>
<th>Bubble Text</th>
<th>Keyboard Shortcut</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td><img src="..." alt="Save" /></td>
<td>Save</td>
<td>F10</td>
<td>Saves all changes entered since the last time you saved.</td>
</tr>
<tr>
<td>2</td>
<td><img src="..." alt="Rollback" /></td>
<td>Rollback</td>
<td>Shift+F7</td>
<td>Clears all information (except key information) and returns you to the first enterable field in the key block.</td>
</tr>
<tr>
<td>3</td>
<td><img src="..." alt="Select" /></td>
<td>Select</td>
<td></td>
<td>Returns you to the calling form and enters the selected value into the field that called the form.</td>
</tr>
<tr>
<td>4</td>
<td><img src="..." alt="Insert Record" /></td>
<td>Insert Record</td>
<td>F6</td>
<td>Inserts a new blank record into the list of existing records.</td>
</tr>
<tr>
<td>5</td>
<td><img src="..." alt="Remove Record" /></td>
<td>Remove Record</td>
<td>Shift+F4</td>
<td>Removes all information for the current record.</td>
</tr>
<tr>
<td>6</td>
<td><img src="..." alt="Previous Record" /></td>
<td>Previous Record</td>
<td>Shift+Up Arrow</td>
<td>Moves the cursor to the first enterable field in the previous record.</td>
</tr>
<tr>
<td>7</td>
<td><img src="..." alt="Next Record" /></td>
<td>Next Record</td>
<td>Shift+Down Arrow</td>
<td>Moves the cursor to the first enterable field in the next record of the current block. If the cursor is in the last record, a new record is created.</td>
</tr>
<tr>
<td>8</td>
<td><img src="..." alt="Previous Block" /></td>
<td>Previous Block</td>
<td>CTRL+Page Up</td>
<td>Moves the cursor to the previous block that has at least one enterable field. If the previous block is in another window, that window is opened.</td>
</tr>
<tr>
<td>9</td>
<td><img src="..." alt="Next Block" /></td>
<td>Next Block</td>
<td>CTRL+Page Down</td>
<td>Moves the cursor to the next block that has at least one enterable field. If the next area is in another window, that window is opened.</td>
</tr>
<tr>
<td>10</td>
<td><img src="..." alt="Enter Query" /></td>
<td>Enter Query</td>
<td>F7</td>
<td>Puts the form into Query Mode so you can enter search criteria to see what information is already in the database.</td>
</tr>
<tr>
<td>11</td>
<td><img src="..." alt="Execute Query" /></td>
<td>Execute Query</td>
<td>F8</td>
<td>Searches the database and displays the first set of records that match your search criteria.</td>
</tr>
<tr>
<td>12</td>
<td><img src="..." alt="Cancel Query" /></td>
<td>Cancel Query</td>
<td>Esc</td>
<td>Cancels the query and takes the form out of Query Mode.</td>
</tr>
<tr>
<td>13</td>
<td><img src="..." alt="View/Send Message" /></td>
<td>View/Send Message</td>
<td></td>
<td>Opens GUAMESG, which is used to create, update or delete messages.</td>
</tr>
<tr>
<td>14</td>
<td><img src="..." alt="Print" /></td>
<td>Print</td>
<td>Shift+F8</td>
<td>Captures the active screen (what you see) and prints it to your local printer.</td>
</tr>
<tr>
<td>15</td>
<td><img src="..." alt="BDMS – Display Document" /></td>
<td>BDMS – Display Document</td>
<td>Not installed at this time.</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td><img src="..." alt="BDMS - Add Document" /></td>
<td>BDMS - Add Document</td>
<td>Not installed at this time.</td>
<td></td>
</tr>
<tr>
<td>17</td>
<td><img src="..." alt="Broadcast Message" /></td>
<td>Broadcast Message</td>
<td></td>
<td>Provides notices of planned or unplanned outages as well as other important system information.</td>
</tr>
<tr>
<td>18</td>
<td><img src="..." alt="FGAC Security" /></td>
<td>FGAC Security</td>
<td></td>
<td>Not installed at this time.</td>
</tr>
</tbody>
</table>
A **Block** is a section of a form or window that contains related information. The first block on most forms contains key information and is known as the **Key Block**. (Some forms do not have a Key Block, **EX: Validation Forms**). The Key Block determines what is entered or displayed on the rest of the form. All information on the form refers to the Key Block. The Key Block has at least one field and sometimes more. The Key Block stays on the form as subsequent blocks appear.

An **Information Block** contains related information and is usually enclosed in a beveled box or separated with a line.
FORM NAVIGATION

There are several ways to navigate through the blocks of information:

- Click **Block** on the Menu Bar and select **Next** to move forward or **Previous** to move back a block.

- Click the **Next Block Icon** on the toolbar to move forward or **Previous Block Icon** to move back a block.

- Use keystrokes `<<CTRL+Page Down>>` to next block or `<<CTRL+Page Up>>` to previous block.

- Right-Click anywhere on a blank canvas of a form and select the **appropriate block** from the menu.

- Click **Options** on the Menu Bar and select the **appropriate block**.

- For tabbed forms, click the **appropriate tab** or press `<<F2>>`.

BUTTONS

These buttons are small squares that contain an icon (picture) located on the form versus the toolbar. They represent one or more actions that can be performed for an associated field or record.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Search" /></td>
<td>Displays another form or window where you can search for information.</td>
</tr>
<tr>
<td><img src="image" alt="Calendar" /></td>
<td>Allows a date to be selected.</td>
</tr>
<tr>
<td><img src="image" alt="Comment" /></td>
<td>Displays a window where you can enter freeform text for the associated record.</td>
</tr>
<tr>
<td><img src="image" alt="Maintenance" /></td>
<td>Updates information in the database.</td>
</tr>
<tr>
<td><img src="image" alt="Approve" /></td>
<td>Indicates the process is approved.</td>
</tr>
<tr>
<td><img src="image" alt="Disapprove" /></td>
<td>Indicates the process is not approved.</td>
</tr>
<tr>
<td><img src="image" alt="Detail" /></td>
<td>Displays details for the associated record.</td>
</tr>
</tbody>
</table>
USING THE CALCULATOR
1. Double-click any numeric field on a form to display the calculator
   NOTE: If the field has a value, the calculator shows that value.
2. You can use the mouse, number keys on the keyboard, or the numeric keypad to make calculations
3. Click OK to return the calculated value to the calling form
There are two other methods you can use to access the Calculator:
   - Click Help on the Menu Bar and select Calculator
   - OR-
   - Type GUACALC in the Go To field
   NOTE: When using either of these access methods, the calculator works independently of any form or field. You cannot return the calculation to a form.

USING THE CALENDAR
1. Double-click any date field on a form to display the calendar
   NOTE: If the date field has a value, the calendar highlights that date and if the date field is empty, the calendar highlights the current date.
2. Click the Single Arrow < or > Icons to move forward or backward a month
3. Click the Double Arrow << or >> Icons to move forward or backward a year
4. Double-click a date on the calendar to return it to the calling form
There are two other methods you can use to access the Calendar:
   - Click Help on the Menu Bar and select Calendar
   - OR-
   - Type GUACALN in the Go To field
   NOTE: When using either of these access methods, the calendar works independently of any form or field. You cannot return a date to a form.

ADDITIONAL USEFUL INFORMATION
Wildcards
Wildcards can be used in your search criteria. There are two wildcard characters allowed in Banner.
   - The percentage sign % represents any character and any number of characters
     EX: D% in the LastName field will find all persons whose last name begins with D.
   - The underscore _ represents any character and only the number of characters for the underscores you have typed
     EX: Peters_n in the LastName field will find all persons whose last name are Peterson or Petersen as well as any other Peters_n names where the second to last character is any other letter.
ACCESSING HELP

Dynamic Help Query allows you to access help information on forms, form blocks, and form fields. There are two types of help:

- **Local Help** – developed specifically by Creighton
  
  **EX:** it will tell you the data entry rules for the fields.
  
  **NOTE:** If specific Local Help has not been created, “Help Exists” will not be checked when you mark Local.
  
- **SCT Banner Help** – developed by SCT

To Access Help:

1. Click **Help** on the Menu Bar
2. Select **Dynamic Help Query**
3. Mark **Local** or **SCT Banner**

   ![Help Form](image)

   **Check Mark indicates Help Exists**

4. Click **Display**

5. To exit help, click **Cancel** two times

**Other Forms of Help**

1. Click **Online Help** on the toolbar
   - **OR** -

2. Click **Help** from the menu bar
   a. Select **Online Help**

The initial display shows you information about the form on which you are working.
EXITING BANNER
There are several ways to quit/close Banner as shown below:

- Click the **Exit** Icon on the toolbar
- Click the **X** in the top right corner
- Type **Exit** in the **Go To** field
- Click **File** from the Menu Bar and select **Exit**

All of these options will lead you to the last window:

![Exit Confirmation Message]

Click **Yes** to Exit or click **No** to stay in Banner