ellucian™

Banner Fundamentals
Financial Aid Training Guide

I. Contents

Introduction

Overview

Goal The goal of this session is to provide you with the knowledge and practice to accurately navigate through the ELLUCIAN Banner system. This handout is divided into four sections:

    A. **Main Menu**
    B. **Menu Bar**
    C. **Toolbar**
    D. **Banner Forms**

What is Banner?

Banner is an administrative software application developed specifically for higher education institutions by ELLUCIAN. Banner maintains student, faculty, course, alumni, financial, financial aid and personnel data.

Banner is:

- ✓ The Drexel University official system of record
- ✓ All-encompassing internet-native software applications for the higher education community.
- ✓ Supports functions that need to be carried out for an institution to run efficiently.
- ✓ Comprised of various ELLUCIAN Banner Products that have the ability to interface with each other for the purpose of accomplishing necessary tasks.

The ELLUCIAN Banner Product suite consists of six products: General*, Advancement (Drexel does not use), Finance, Financial Aid, Human Resources, and Student.

* Included when any of the other products are licensed.

☆ Accessing Banner 8 for the First Time

- Open an Internet Explorer Browser.
- Click in the Address Bar
- Type the URL: http://banner.drexel.edu

NOTE: in the training session we use the test database DUSIMS. The URL for this database is https://banner.irttest.drexel.edu/.

The first time you access Banner 8, you may be prompted to install a new version of Java, an Internet plug-in needed to run Banner 8 (Internet Native Banner). This plug-in should be installed on each computer that is used to access Banner. If you are using a Mac, you might not have to install the plug-in. MAC users may receive a message asking if you want to grant access to Java -- click on Always Grant when you receive this message.

Section A: Main Menu

Overview

Objectives   After completing this section, you will be able to

- describe the areas of the ELLUCIAN Banner Main Menu
- navigate through the Main Menu hierarchical structure
- utilize methods for accessing forms
- create and change My Banner

The Main Menu provides an overview of the menus, forms and jobs on ELLUCIAN Banner. The main menu is used to navigate through ELLUCIAN Banner. **Figure 1**
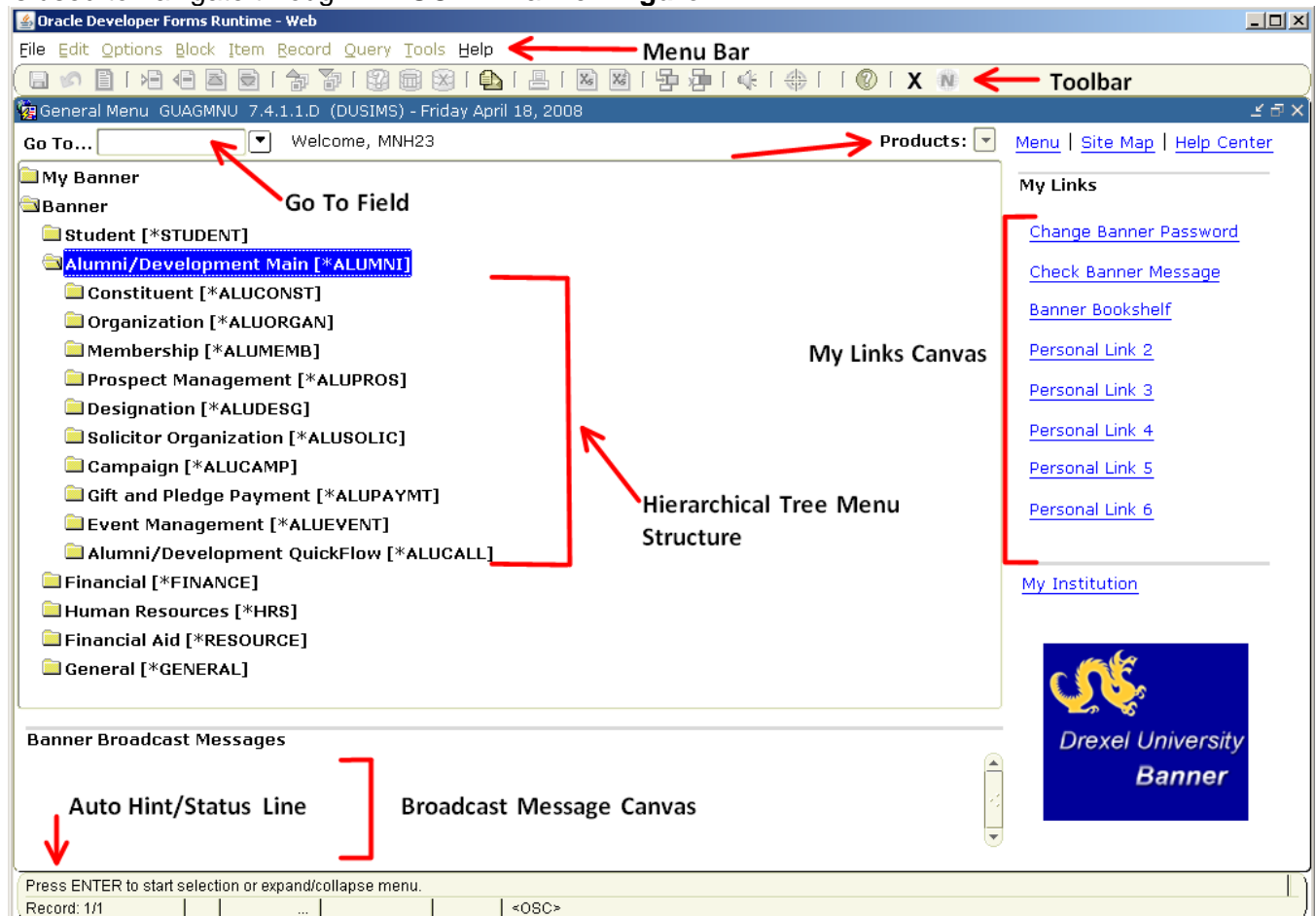
Figure 1

The most commonly used ways to access forms are:

- Hierarchical Tree Menu Structure
- 'Go To…' Field from the Main Menu
- Options Menu from within a form
- List of forms accessed during current ELLUCIAN Banner Session stored in the File Menu
- Direct Access (GUAPARM) Form
- Site Map

☆ Hierarchical Tree Menu Structure

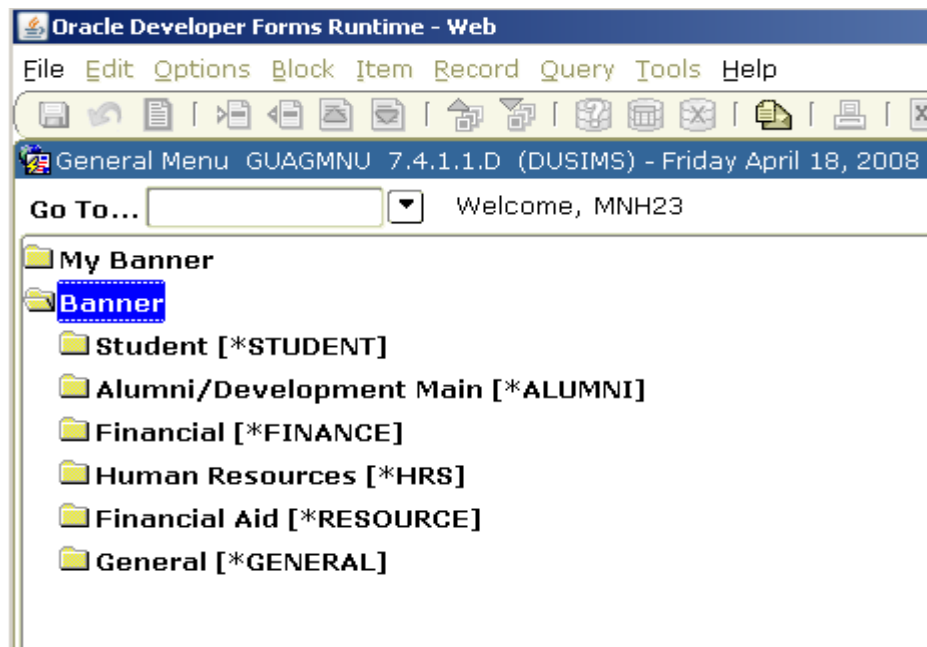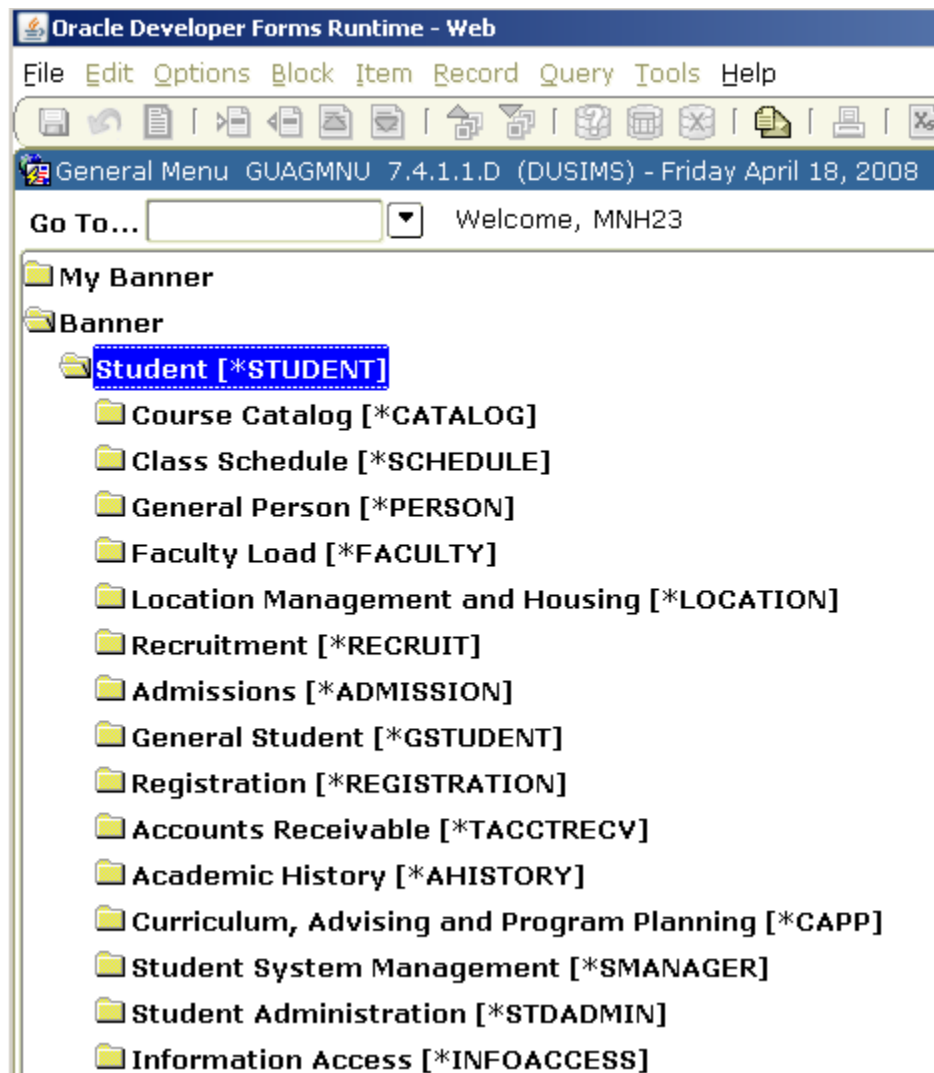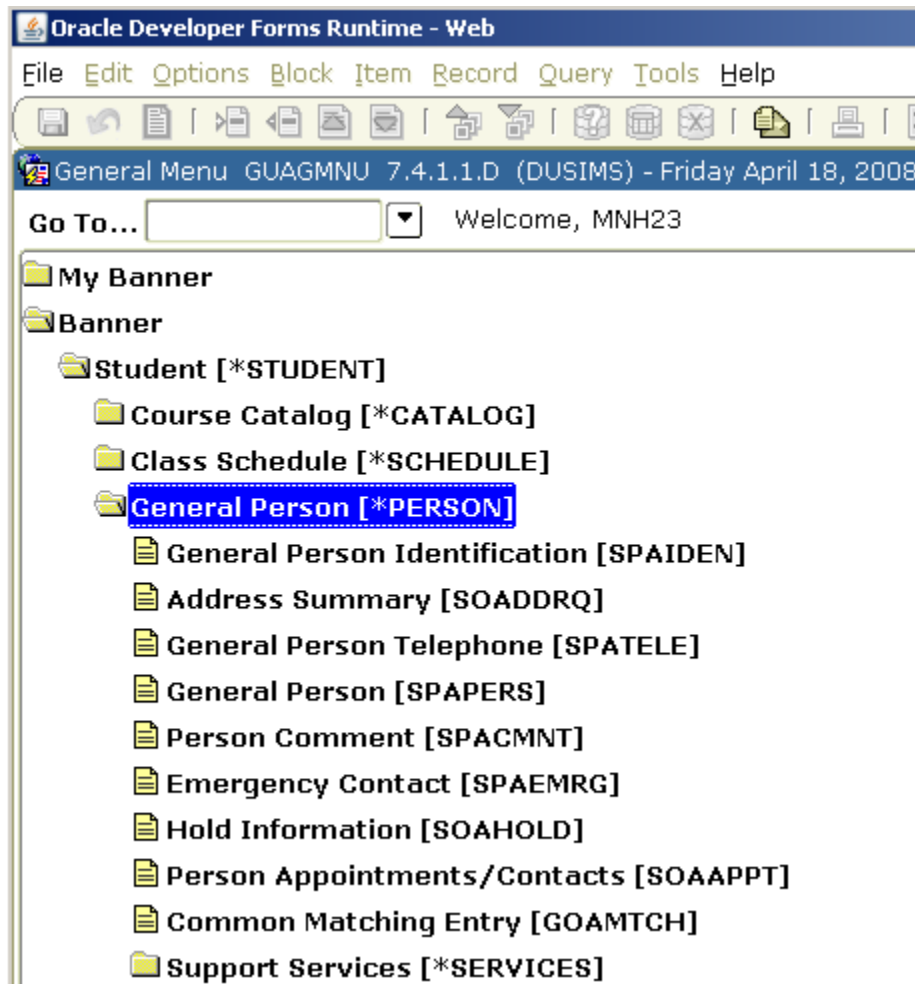| IF	AND	THEN
You click the closed folder to expand…	You see more closed folder….	It can be expanded further. *See Figure 2*
You click the closed folder to expand…	You see the open folder…	It cannot be expanded further. *See Figure 3*
The menu cannot be expanded further…	You see the form that you want…	Double-click on that form to access it. *See Figure 4*

Figure 2

Figure 3

Figure 4

You can see the menus (*i.e.* Student), submenus (*i.e.,* Course Catalog, Class Schedule, General Person) and forms (*i.e.,* General Person, Address Summary, etc.)

Personal menus can be tailored to individual needs.

☆ Site Map

The site map is accessible by selecting the site map link from the main menu. It will list top–level menus and one level below them. No fields are listed, just links to various menus and forms. **See Figure 9**
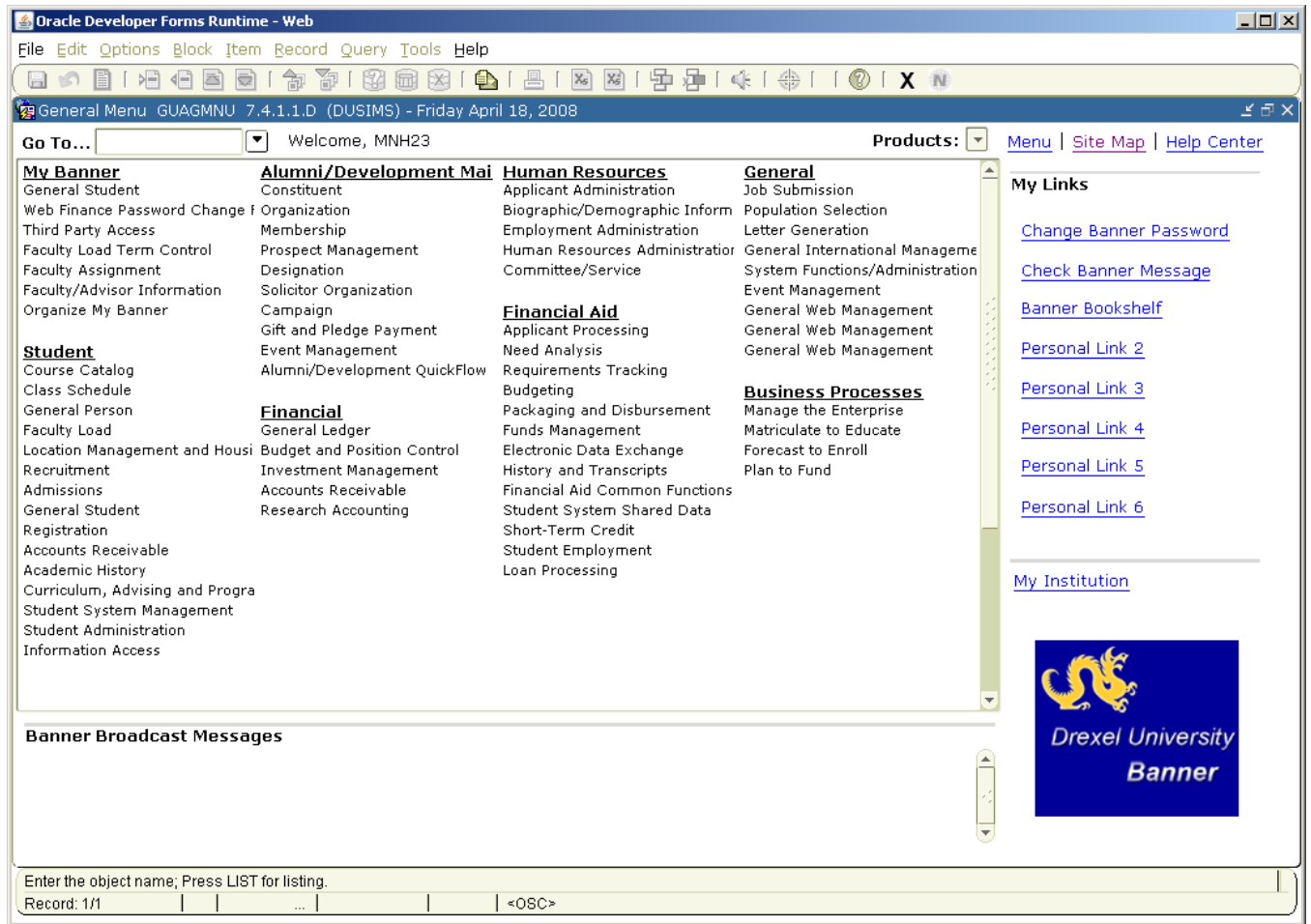

Figure 5

Using the site map

IF	THEN
You select a product from the site map…	The main menu displays the product you selected with one level expanded.

☆ Go To

You can access a form from the 'Go To…' Field above the Main Menu, if you know the *7-character* code of the form you wish to access. You may also use the up and down arrow keys in the 'Go To…' Field to access forms you have previously opened during your current ELLUCIAN Banner session. **See Figure 5**

STEP	ACTION
1	Enter the forms' 7-character code in the **Go To…** field
2	Press **Enter** or **Tab**

Figure 6

☆ Options menu

Forms can also be accessed from the Options Menu within a form. When you are in most forms ELLUCIAN Banner lists related forms in the Options Menu. You may access these forms by choosing them from the Options menu and when you close out of the chosen form you will be taken back to the original, or 'Calling', Form. **See Figure 6**
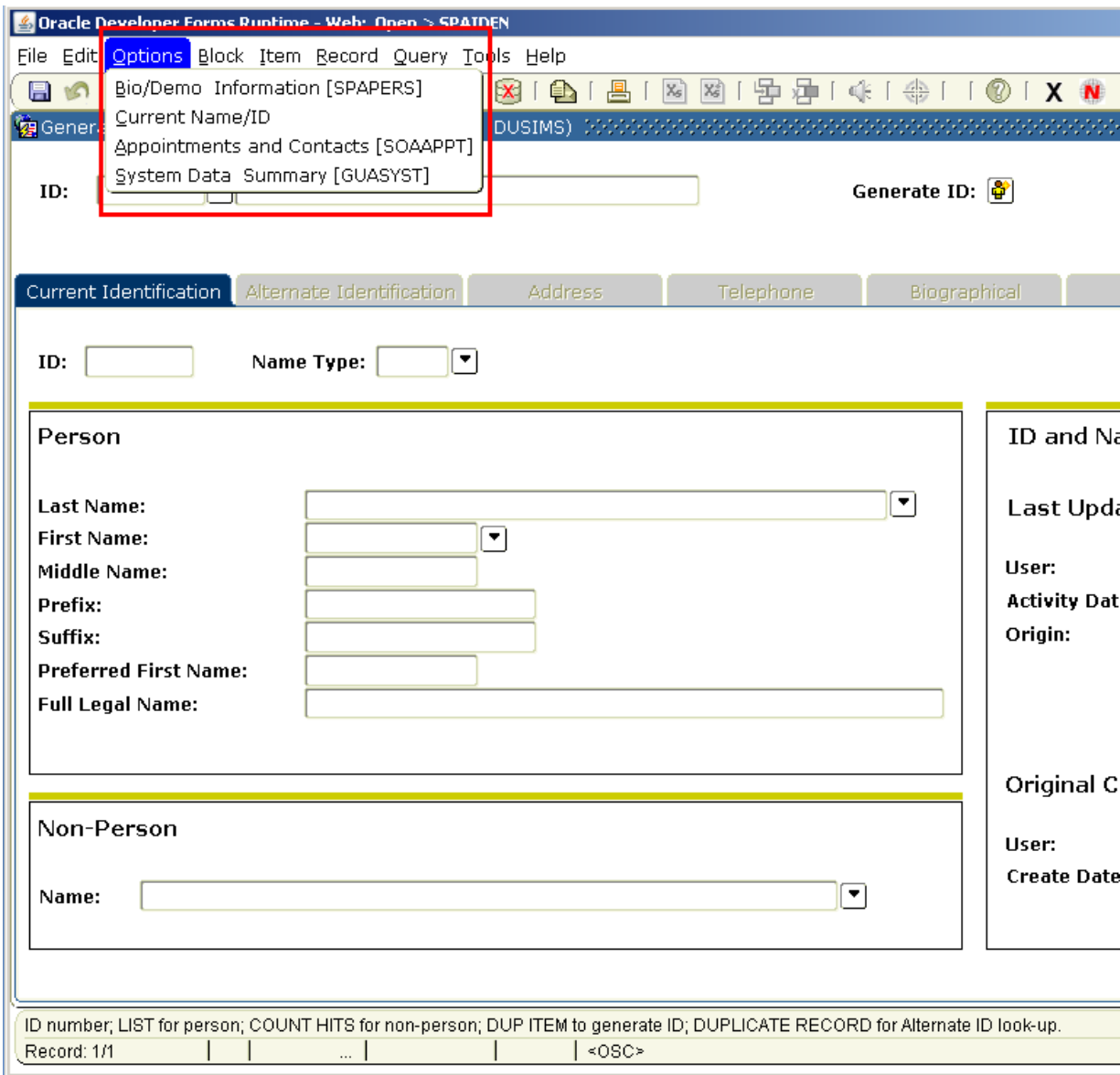

Figure 7

☆ List of forms stored in the File Menu

Forms can be accessed from the list of forms that are stored in the File Menu. ELLUCIAN Banner retains a list in the '**File**' menu of the forms you have accessed during your current ELLUCIAN Banner session. You may quickly access these forms by clicking on the File menu and choosing the form from the list. The list is refreshed each time you log out and log back in to ELLUCIAN Banner. **See Figure 7**
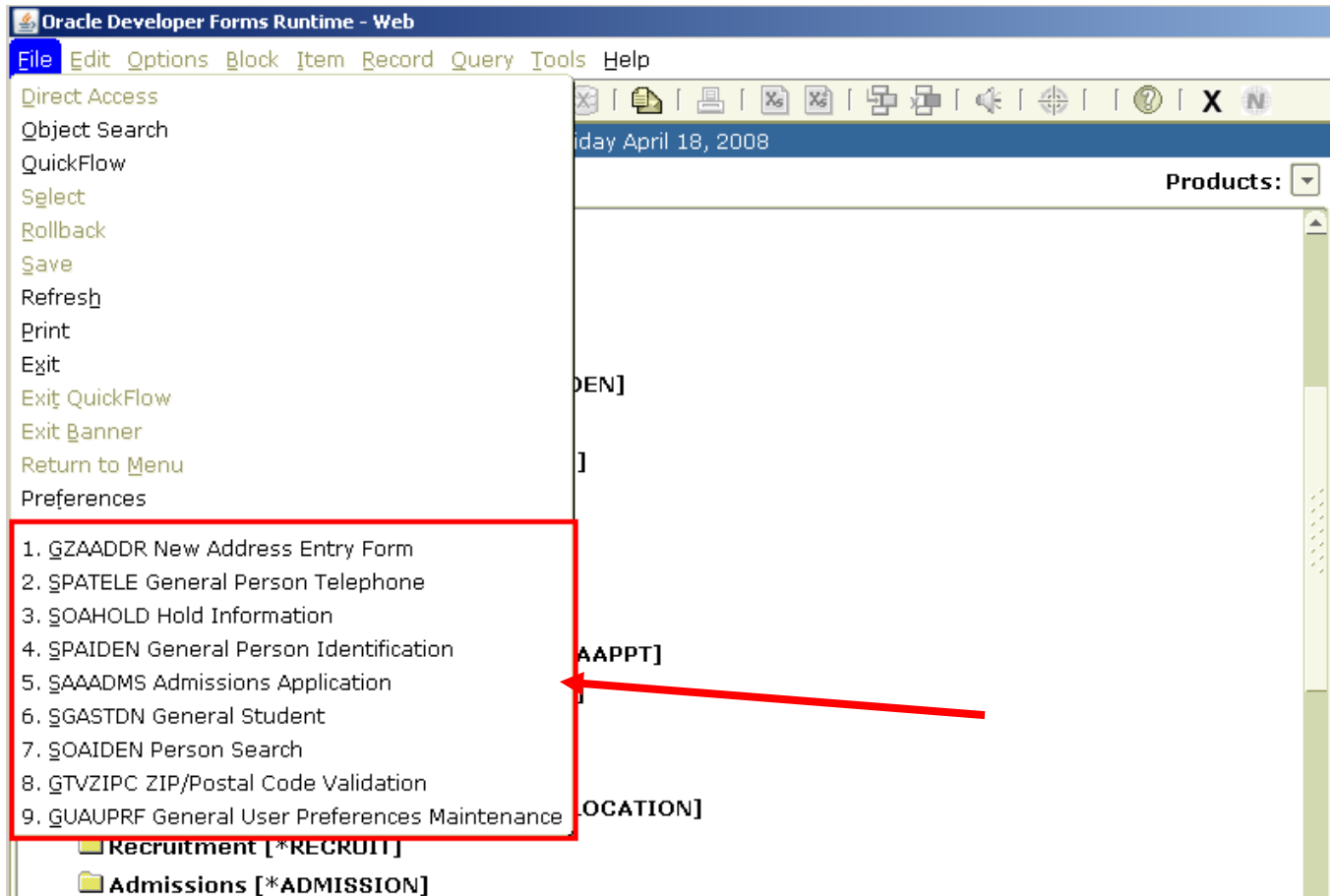

Figure 8

☆ Direct access

Use the **Direct Access** Form (GUAPARM) for quick access if you know a form's 7-character code. Follow these steps to complete the process:

| Step	Action
1	While in any form, from the menu bar, select **File**.
2	Select the **Direct Access** option. That will take you to GUAPARM. Note: Always open Direct Access from the File menu on the menu bar. You will learn more about the seven-character code later on in the module.
3	Enter a valid name of a form.
4	Click the Enter key.
5	While in any form, you can also get to Direct Access by pressing the F5 function key. When finished with the new form, press F5 again to close the Direct Access window. *See Figure 8*
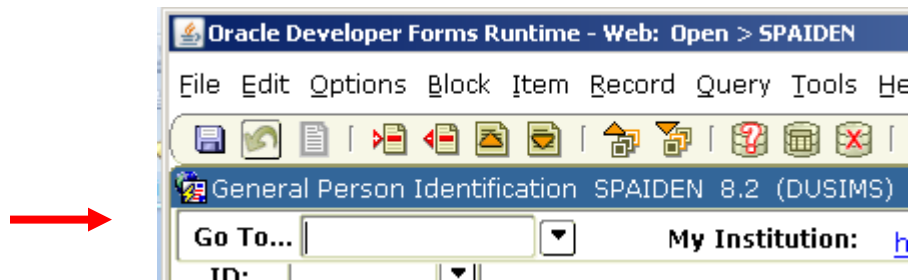
Figure 9

Section B: Menu Bars

Overview

Objectives   After completing this section, you will be able to
- Describe the ELLUCIAN Banner menu bar
- Utilize the functions in the ELLUCIAN Banner menu bar.

The Menu Bar is located at the top of the main menu on all forms. It offers a variety of options for navigating within ELLUCIAN Banner. The menu bar is accessible anytime except when a dialog box, alert box, or list of values (LOV) is displayed on the screen. **See Figure 10**
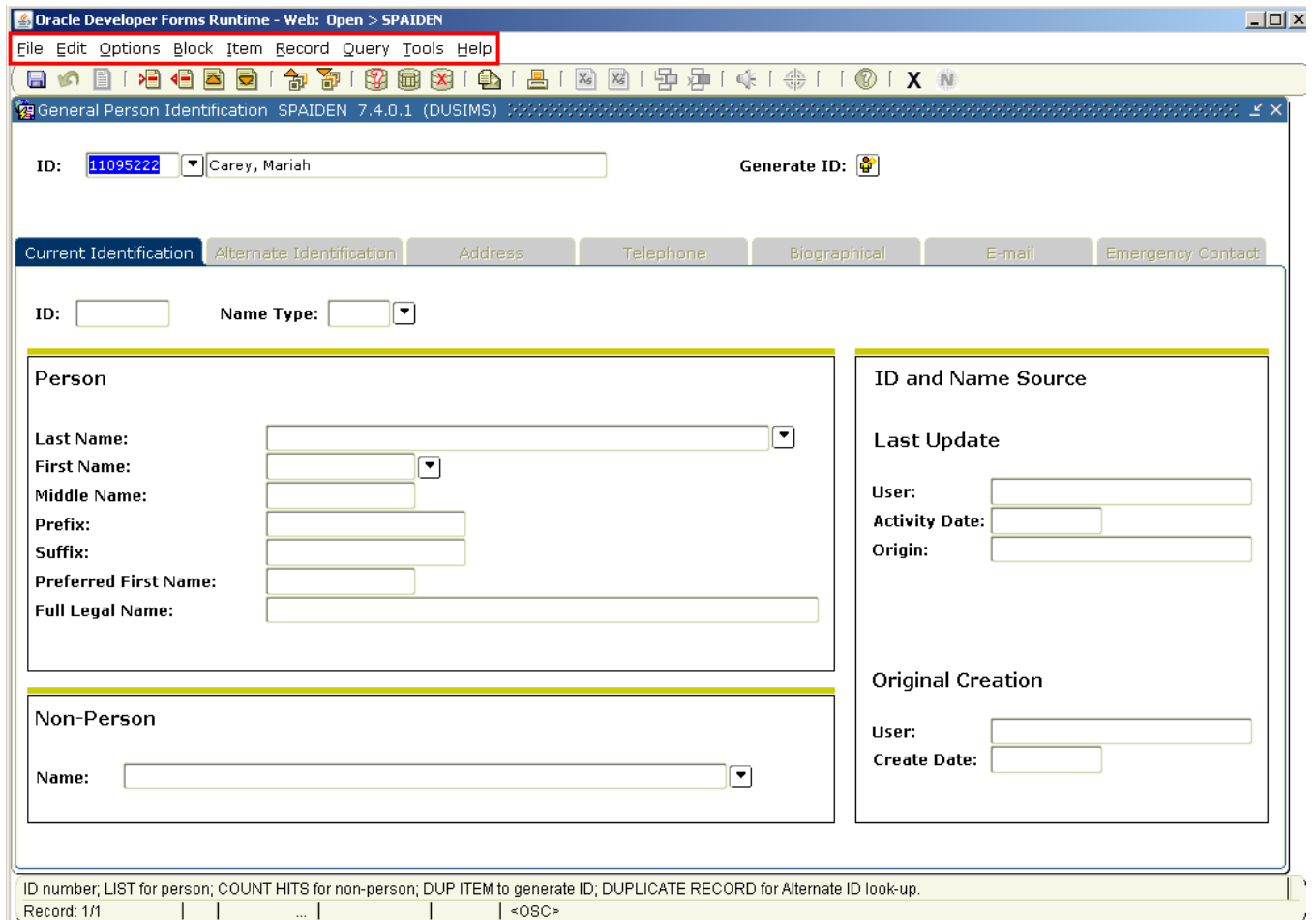
Figure 10

☆ Menu Bar

The menu bar consists of several pull-down menus **components.**

There are 9 pull-down menus on the menu bar, each with a variety of selections. A dimmed option on a pull down menu indicates the menu is disabled.

- ✓ **The file menu**
  The file menu contains standard ELLUCIAN Banner and Oracle functions.
- ✓ **The edit menu**
  The Edit Menu contains functions used to edit text items.

☆ The Options Menu

The options menu varies from form to form. Some take you to other blocks and windows within the current form, other options take you outside the current form. The **Options Menu** as well as valid **File Menu Options** may be accessed at any time by right clicking on a blank section of any form. **See Figures 11 & 12.**
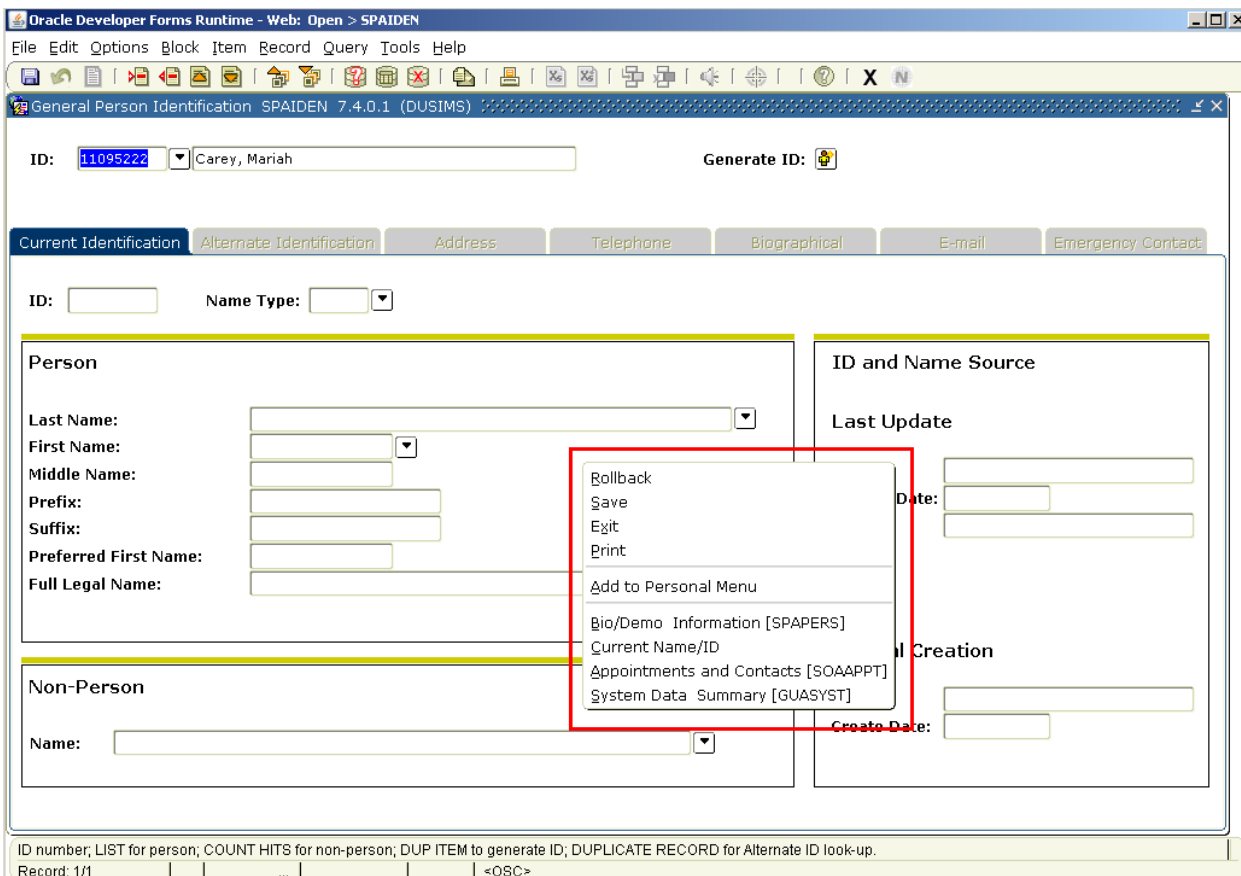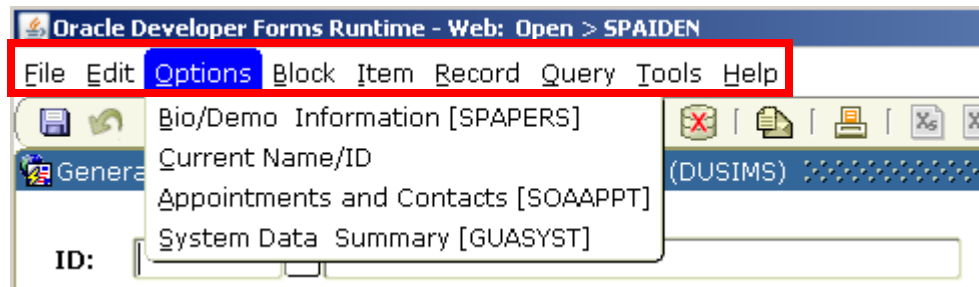

Figure 11

Figure 12

- ✓ **The Block Menu**

  The Block Menu enables you to move from one block area to another within a form.

- ✓ **The Item menu**

  The Item Menu enables you to move from one field to another and clear and duplicate data within a

  form.

  - o **Note:** "Item" is the ELLUCIAN Banner term that is used to refer to a field.

- ✓ **The Record**

  The record menu allows you to work with records within a form **menu.**

- ✓ **The Query menu**

  The Query Menu contains the functions used to search for information in the database based on

  specific criteria.

- ✓ **The Tools menu**

  This is currently not in use.

- ✓ **The Help menu**

  The Help Menu contains various help tools, the image displayer, a calculator and a calendar.

Section C: Toolbar

Overview

A toolbar is a set of icons that represent shortcuts for performing common functions. **See Figure 13**
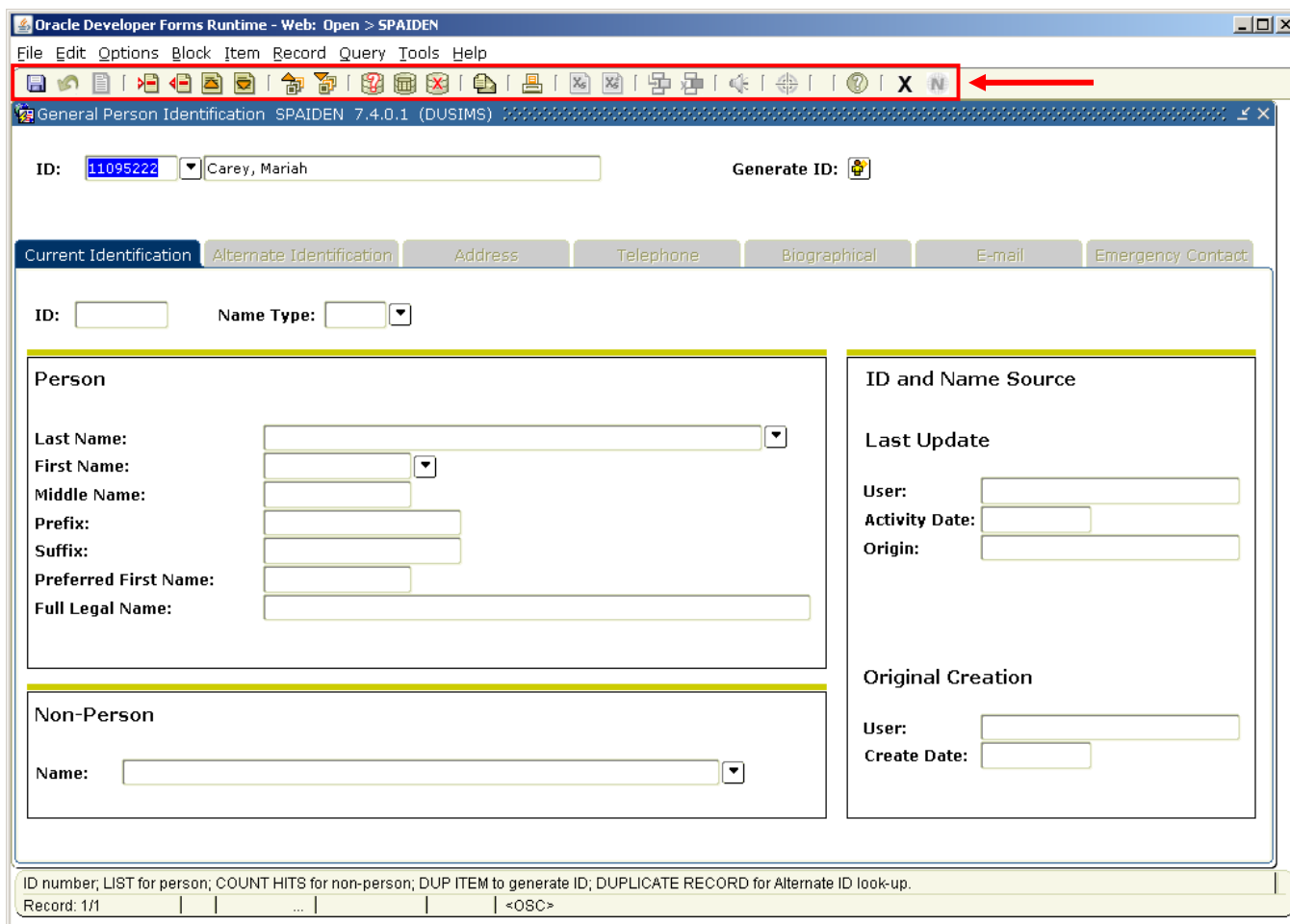

Figure 13

☆ Bubble help

If you move your cursor over an icon, a box appears that describes the function of the icon; this is bubble help. It may be turned off at any time.
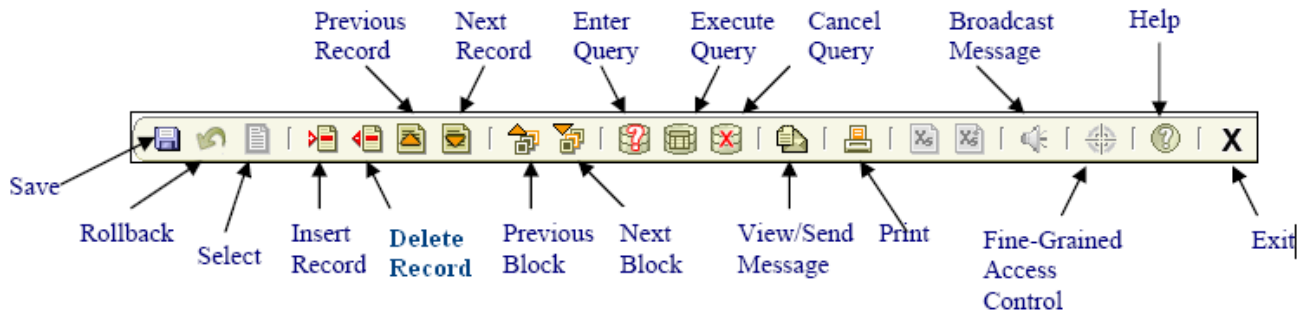
Example: if you place your cursor over the exit icon, you will see the following:

Note: To turn on the description box for the icons, access the General User Preferences Maintenance Form (GUAUPRF). Under Toolbar Display Options, make sure that the Display Bubble Help option is checked.

☆ Default Icons

This is the standard **icon toolbar**.

The faded items are not available at this time or on a particular form. The Menu Bar above the icons provides dropdown menus, which are available for selection.

Some of the most common icons are identified below. Run the cursor over the icons on your screen to see their functions.

Icon	Function
	Save
	Rollback
	Select
	Insert Record
	Previous Record
	Next Record
	Previous Block
	Next Block
	Print
	Exit

Section D: ellucian Banner Forms

Overview

Objectives: After completing this section, you will be able to
- Describe areas on the form
- Define types of forms
- Explain the naming convention for forms
- Describe blocks, fields and records

A form is an online document where you can enter and look up information in the database. A form visually organizes information so it is easier to enter and read. A Banner form is similar to a paper form, except information is entered once and then used by other forms, reports, and jobs.

I. Parts of Forms
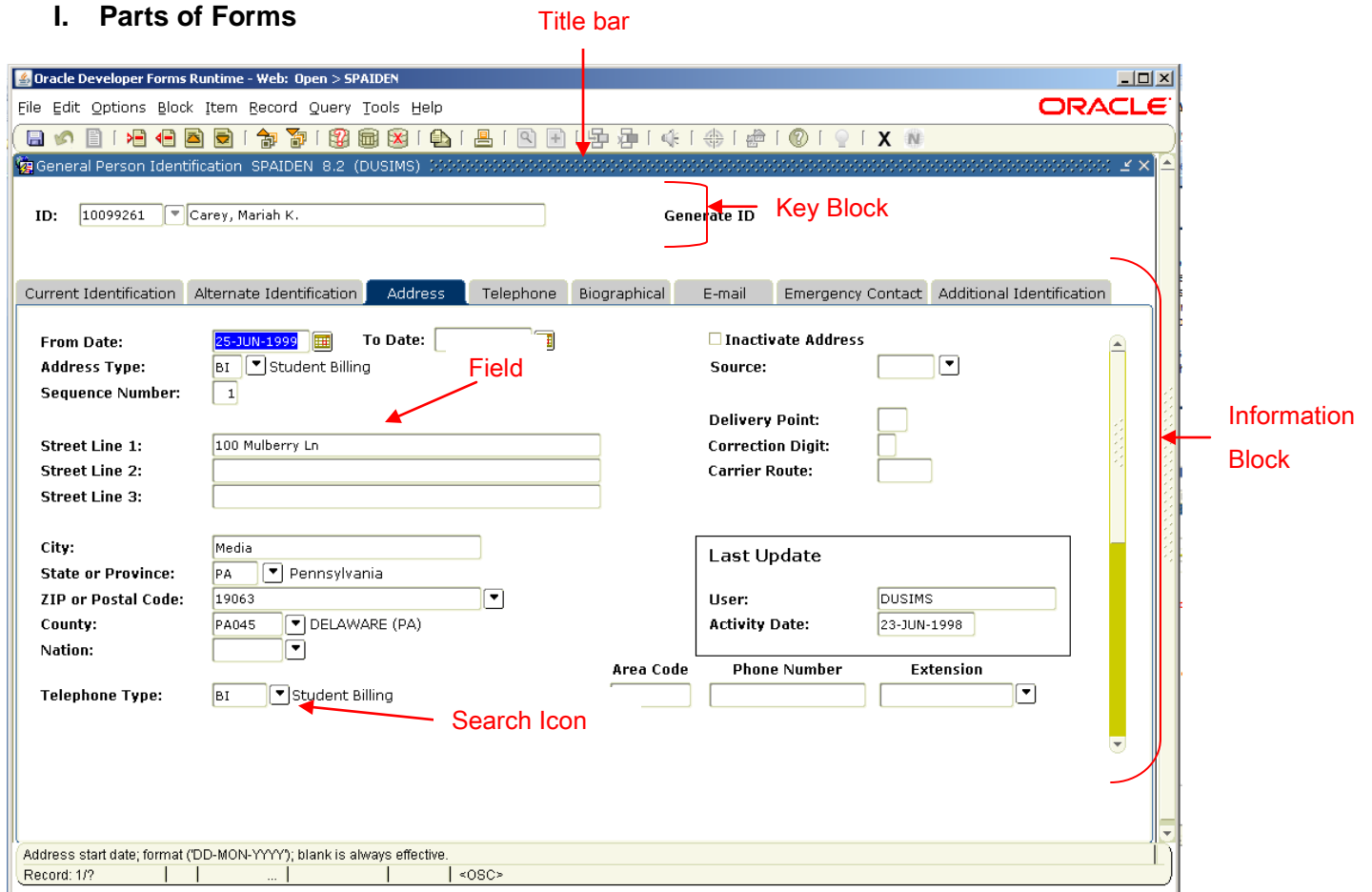
Figure 14

Title Bar	May display the form's descriptive name, the seven-character ID name, the software version number and the database name. *See Figure 14*

Key block	Contains information that determines what is entered or displayed on the remainder of the form. e.g. student id number or term. *See Figure 14*
Information block	Displays data about the information entered in the Key Block. Area where you enter information prior to updating a record. *See Figure 14*
Field	Area on a form where you can enter, query, change, and display specific information. *See Figure 14*
Pull-down list/ Search Icon	Used to select a field value from a list of pre-defined values. A down arrow in the right side of the field indicates that the field has a pull-down list or can be used to search for data. *See Figure 14*
II. Tabs	III. Tabs are used to arrange information in a meaningful way and allow you to navigate easily between groups or blocks of information. *See Figure 15*

Figure 15

Types of Forms

Form types: Based on their usage, forms are categorized as different types including Inquiry, Query, Application, and Maintenance forms

   a. **Inquiry form:** Inquiry forms are used to look up existing information, often returning information to the calling form. You can access an inquiry form from the main menu, from another form, with Direct Access, or with Object Search.

   b. **Query form:** Query forms are used to look up existing information, often returning information to the calling form. You can access most query forms directly from the main menu, with Direct Access, or with Object Search.

   c. **Application form:** Application forms are used to enter, update, and query information in ELLUCIAN form Banner. This is the most common type of form.

   d. **Maintenance form:** Maintenance forms are used regularly to reflect changes/updates that will effect form information in ELLUCIAN Banner.

Naming Conventions

Every form has an abbreviated 7-character form name. Most of the time, forms are referred to by this 7-character name.

The first 3 characters in the form name represent the product, the application group and the type of form respectively. The last 4 characters are a unique identifying code.

Position 1 for ELLUCIAN Banner forms

Identifies the ELLUCIAN Banner product owning the form, report, process or table. Examples:

R = Financial Aid   T = Accounts Receivable   S = Student (shared)   G =General

Position 2 for ELLUCIAN Banner Financial Aid
Identifies the application module owning the form, report, process or table.

N =Needs Analysis	P = Packaging	F = Funds Mgmt	R = Requirements
B = Budgeting	E=Electronic Data Ex	O = Status	J = Work Study

*Z= Drexel Custom Form or Procedure

Position 3 for ellucian Banner Financial Aid

Identifies the type of form, report, process or table.

A = Application	I = Inquiry Form	Q = Query
B = Base Table	P = Process	R = Rule Table or Repeating Table

Positions 4, 5, 6 & 7 for ellucian Banner Financial Aid

Identifies a unique four-character code for the form, report, process or table. Examples:

**AWRD –Award   **STAT-Status   **AREQ –Applicant Requirements

Some Banner Financial Aid forms are Aid Year Specific. If the last 2 characters of the form name indicate are numbers this indicates the suffix of the aid year. For example

RNANA11- The *11* indicates this form contains data specific to the 10-11 aid/academic year

Blocks, Fields and Records

All ellucian Banner forms are made up of three components: Blocks, Fields and Records.

Blocks

A block is a section of a form or window that contains related information. If a form or window contains more than one block, each block (except the key block) may be enclosed in a beveled box.

Blocks:

- Group information

- Can be one or more on a screen

- May be organized on tabs within a form

- Think of as "sections" on a form

Example: A student's record in SPAIDEN contains the following blocks: Current Identification, Person Name Information, and Non-Person Information.

Types of blocks There are two types of blocks: a Key Block and an Information Block.

Part of Form	1. Description
Key block *See Figure 16*	•Where you start on a form. •Every form has a Key block. •A unique code is entered such as an ID number, term code or document number. •Lets ELLUCIAN Banner know what piece of information you want to retrieve. •The rest of the information on the form will refer to the information that you enter on the Key block.
Information block *See Figure 16*	• Section that contains related information to what was entered in the Key block • A line (usually green/yellow) may separate each Information block on the form.

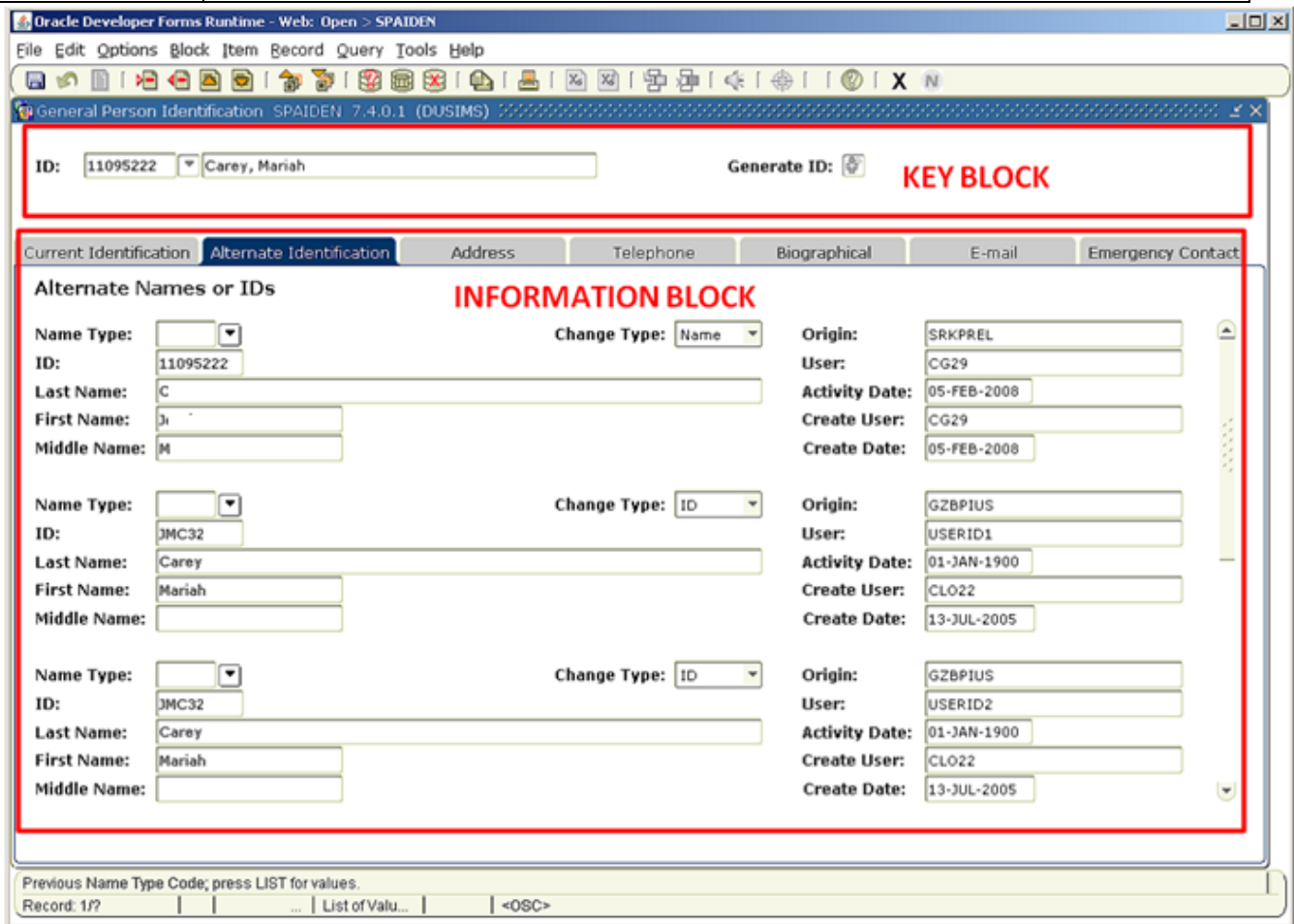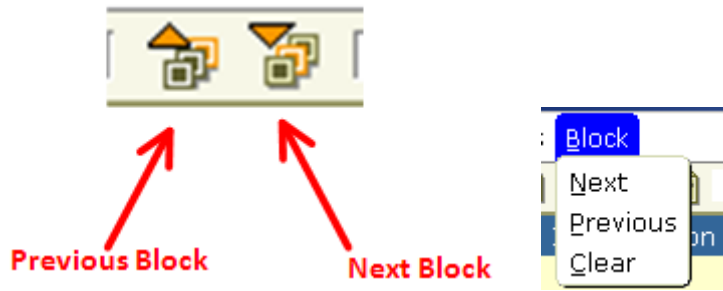**Figure 16**

Navigating blocks   To navigate in between blocks or tabs, you would use the Next Block or Previous Block functions. These are icons located on the toolbar in a form. You can also use the drop down menu.   If you prefer to use keystrokes for navigation, you can use Ctrl-Page Down to reach the Next Block or Ctrl-Page Up for the Previous Block.

Previous Block   Next Block

Fields

Fields are labeled space within a block. You can enter, query, change and/or display specific information within a field. **Figure 17**


Figure 17

Field states The list on the next page details the different states a field can be presented on a form.

Note: You may not be able to navigate to all fields within a form. On query-only forms, you frequently cannot move through any fields at all.

Field values Any data that is entered or displayed in a field is a value.

Note: The names of the fields that have a pre-defined list of values, or LOV, have a drop down arrow next to the field. Fields that you can search for a value in the database also have a drop-down arrow next to the field. The most common example is the ID field on the various Identification forms.
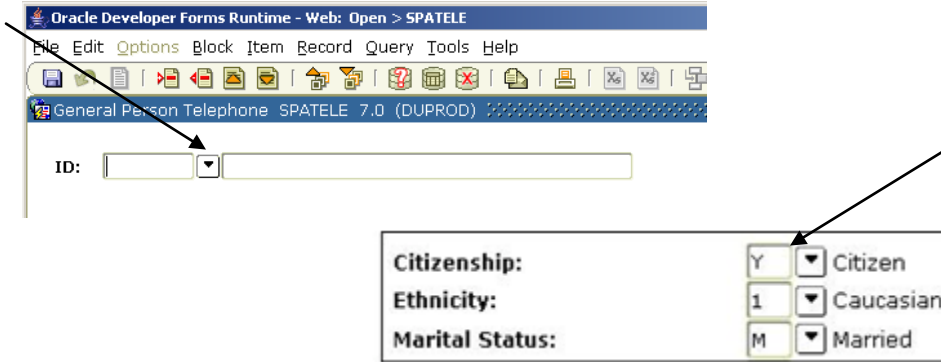
Type	Description	Example
Free-format Field	Free access to type in whatever information is required. Not previously defined on a validation table.	Street address
List of Values (LOV) Field	Data from the LOV comes from previously defined values on a validation table. When you double-click on a LOV field, use a Search icon or press the F9 key, previously defined values are displayed.	State Codes (e.g. PA, NJ, DE)
Search Field	If a field is a search field, you must click the search icon to do the search.	ID, Last Name, First Name

Records

A record is a group of fields or row of fields that make up a logical unit. There may be more than one record in a block.

>   *Example*: A person record is made up of several fields: ID, Last Name, First Name, Middle Name, Birth Date, Change Indicator, Type

Record counter   The record counter displays number of records viewed and the number of total records. **See Figure 18**

Figure 18
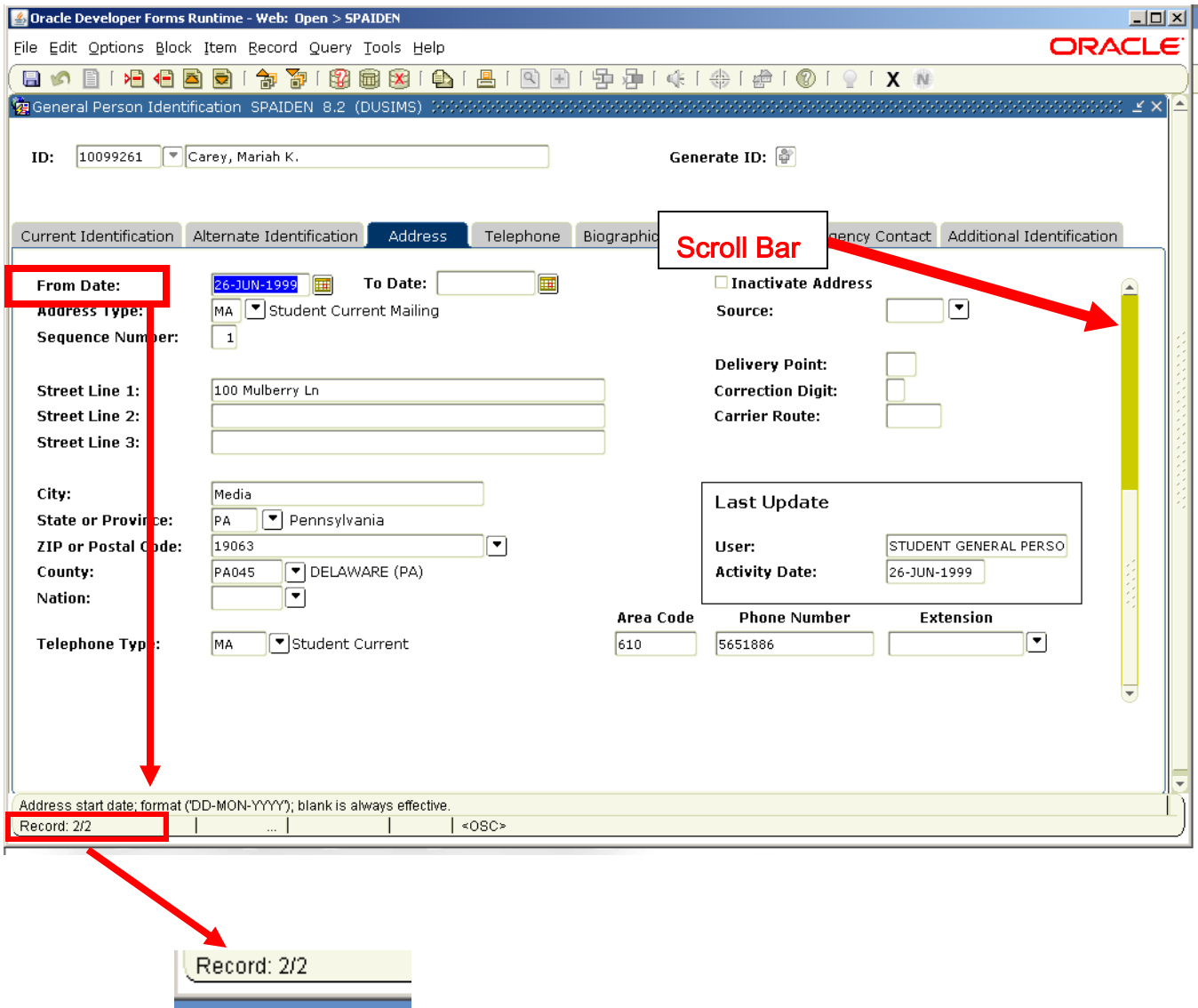
Note: A question mark in the status line signifies that there are more records, but you haven't gotten to the last one, so the computer doesn't know how many there are yet.

Searching for items in a database

Menu options The following charts details each Query menu option and its purpose.

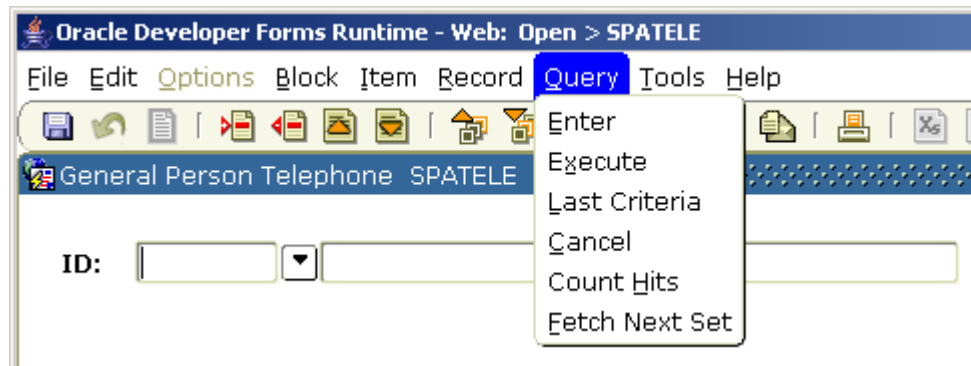| Options	Toolbar Icon	Keyboard Shortcut	Purpose
Enter		**F7**	Puts the form into Query mode so you can enter search criteria to see information already in the database.
Execute		**F8**	Searches the database and displays records that match your search criteria.
Last Criteria		**F7 twice**	Enters the criteria from your last search (enabled only when you are in Query mode).
Cancel		**Ctrl-Q**	Cancels the Query and takes the form out of Query mode.
Count Hits			Counts the number of records that match the search criteria and displays that number on the Auto Hint line.
Fetch Next Set			If more records meet the search criteria that fit in the window, clicking this option replaces the current set of displayed records with the next set.

A wildcard is a special character that represents one or more other characters. Use these in search criteria. The **% (percent sign)** represents any number of characters. The _ **(underscore)** represents one occurrence of a character.

> **Note:** In the following, 'ma' is used as an example. The wildcard symbols can be used with any combination of letters in any order.

To get these results…	Enter these criteria…
All entries that contain 'ma'	%ma%
All entries that begin with 'ma'	ma%
All entries that end with 'ma'	%ma
All entries that have 'm' as a second character	_m%

Exercise 1 – Perform a Name Search

Use the Address form (**GZAADDR**) to search for a name and address.

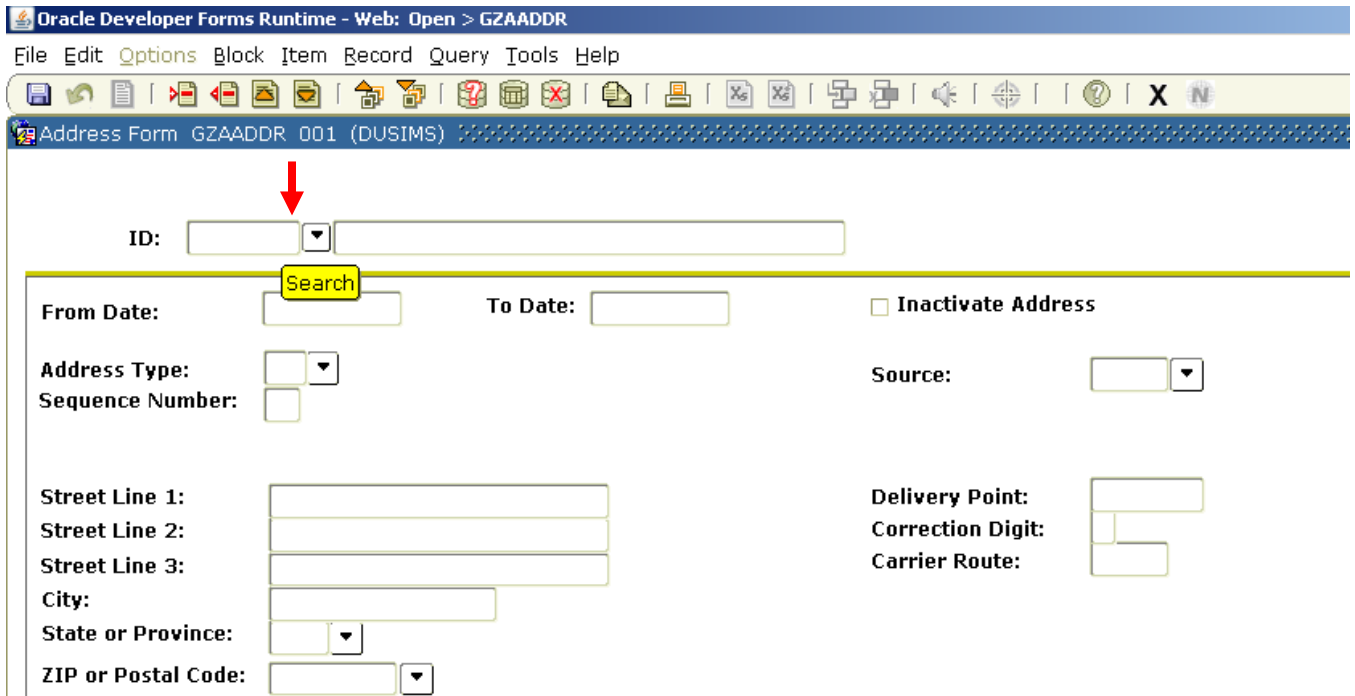**Figure 19**

Click on the **ID** Search Arrow to get the following menu. Selection Person Search (click on it or use keyboard arrow keys). **See Figure 19**
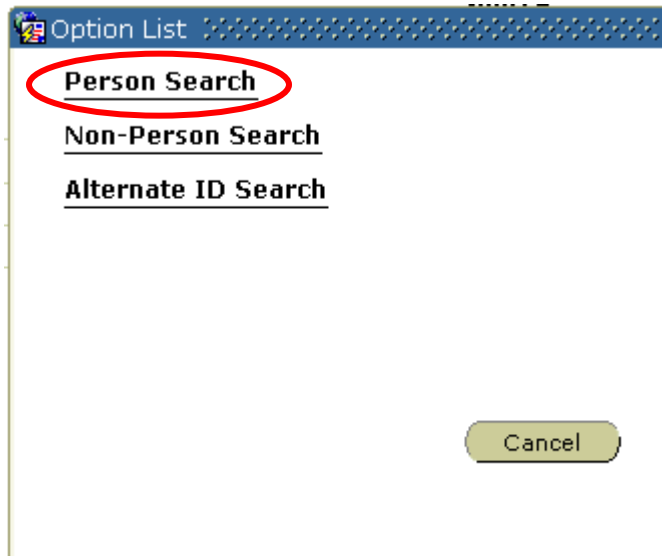
- This will bring up the Person Search form (**SOAIDEN**). **Figure 20**

Figure 20

Use the wild card feature (%) to type in a limited amount of the last name and first name (*e.g.,* **"Gr%y"** in the Last Name field and **"Carol"** in the First Name field). Either click the Option -> Execute from the menu bar or hit the **F8** function key to execute the **Query**. If you don't find what you want or you want to narrow down the search, click Option ->Enter or the **F7** function key to **clear** the search and start over.

If you find what you need, select it by either *Double Clicking* on that item, or highlighting the item you want and then clicking the **Select** Icon on the menu bar.
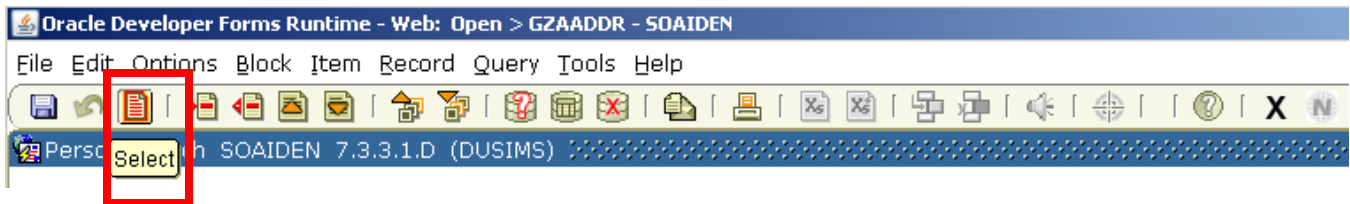
1. Once you have the name and id you want and have selected it, you are taken back to the form you came from. The name and id are now in the top of the form. To get into the form, use Next Block to view the addresses. There are <u>three ways</u> to get there.

    a. Click the Next Block Icon
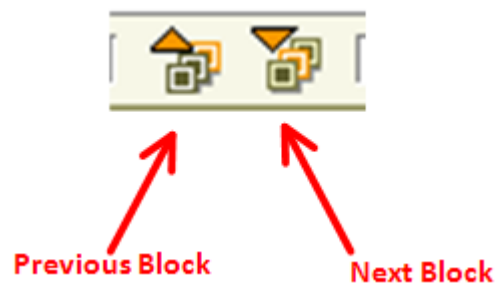
    b. Click Block on the pull-down menu and then Click Next

    c. Hold the **Ctrl key +** the **Page down key**

2. Scroll through the addresses or search for a particular address type.

Section E: Understanding the Term Code Structure

Drexel University offers most academic programs in Quarters. However, the College of Medicine and a few College of Nursing and Health Professions as well as School of Public Health programs are offered in Semesters.   The coding scheme has to account for both types and be in numeric/chronological order.

YYYY= Academic Year

Term	Term Type	Fall	Winter	Spring	Summer
Semesters	S	YYYY11	----------	YYYY31	YYYY41
Quarters	Q	YYYY15	YYYY25	YYYY35	YYYY45

If the term code ends in **1** it is a **semester.**

- The First 4 digits = Academic Year (e.g., 2016 = Academic Year 2016-17)
- The next to the last digit = the Semester: 1 = Fall, 3 = Spring, 4 = Summer
- The last digit, 1 = Semester

If the term code ends in **5** it is a **quarter**.

- The First 4 digits = Academic Year (e.g., 2016 = Academic Year 2016-17)
- The next to the last digit = the Quarter: 1 = Fall, 2= Winter, 3 = Spring, 4 = Summer
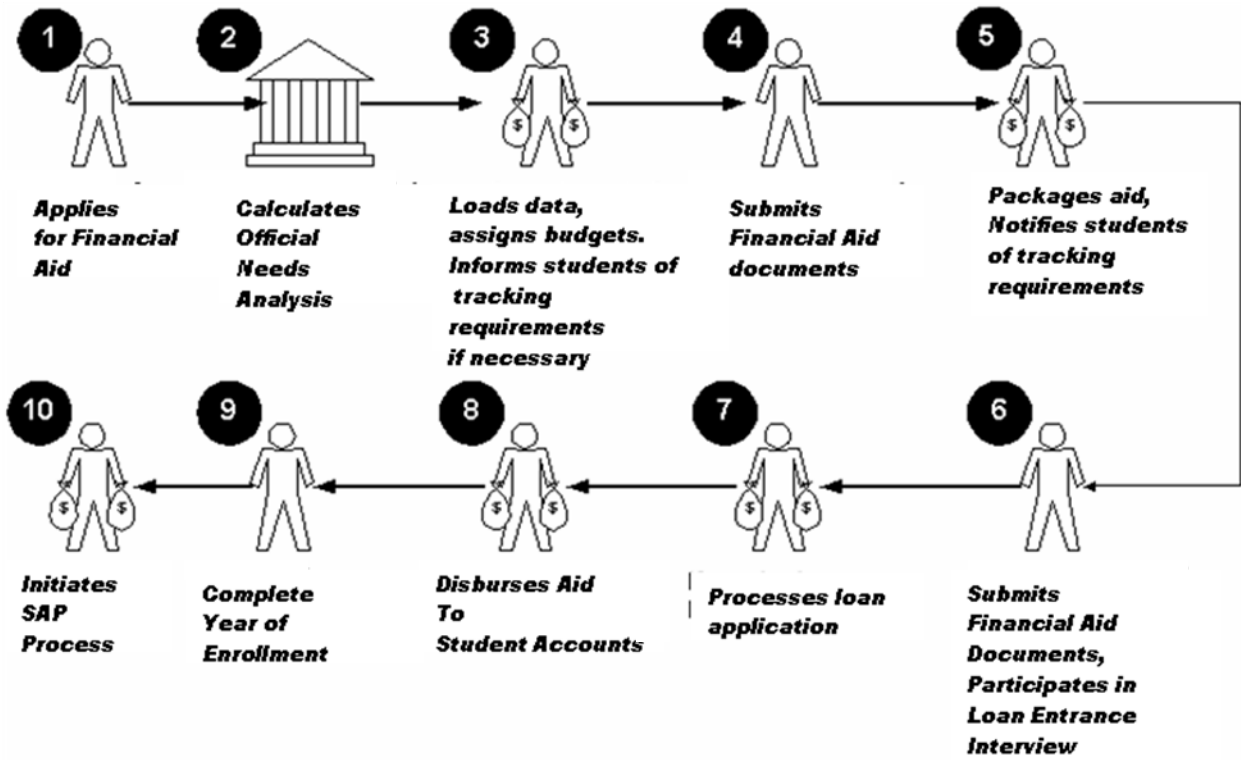- The last digit, 5 = Quarter

Semester Examples:
        201611 = Fall Semester 2016-17
        201631 = Spring Semester 2016-17
        201641 = Summer Semester 2016-17

Quarter Examples:
        201615 = Fall Quarter 2016-17
        201625 = Winter Quarter 2016-17
        201635 = Spring Quarter 2016-17
        201645 = Summer Quarter 2016-17

Section F: Banner Financial Aid Process & Forms

1. Applies for Financial Aid
2. Calculates Official Needs Analysis
3. Loads data, assigns budgets. Informs students of tracking requirements if necessary
4. Submits Financial Aid documents
5. Packages aid, Notifies students of tracking requirements
6. Submits Financial Aid Documents, Participates in Loan Entrance Interview
7. Processes loan application
8. Disburses Aid To Student Accounts
9. Complete Year of Enrollment
10. Initiates SAP Process

FAFSA

Needs Analysis Form (*RNANAxx*): Stores all of the students answers to the FAFSA questions, displays date entered into Banner

Needs Analysis Results (*RNARSxx*): Shows whether an EFC is official, has the application been selected for verification, override options and any reject reasons

Applicant Needs Analysis Inquiry Form (*RNIAPPL*): Displays all of the FAFSA transactions in Banner for a student, can view prior transaction EFC

Applicant Status & Requirements

Applicant Status Form (*ROASTAT*): Summarizes application data and financial need, stores SAP status.

Applicant Budget Form (*RBAABUD*): Displays budget components and amounts; updates are made here with documentation

Financial Aid Enrollment Form (*ROAENRL*): Summarizes credit and billing hours. Indicates if the student has a consortium agreement

Summary Academic History Form (*RSIHIST*): Summarizes student enrollment and GPA data-Institutional, Transfer & Overall by level

Applicant Requirements Form (*RRAAREQ*): Displays all tracking requirements for a student; shows status, date established, manual or system assigned, fund-related and what it prevents if left unsatisfied

Awards and Disbursement

Award Form (*RPAAWRD*): Displays annual award amounts, budget, gross and unmet financial need, aid period, this is where awards are made

Package Maintenance Form (*RPAAPMT*): Award detail by term; original offer dates, override capabilities, memo expirations

Disbursement Results Form (*ROIDISB*): Displays errors encountered during disbursement process

Loans and Loan Disbursement

Student Loan Data Form (*RNASLxx*): Displays cumulative borrowed amounts for Stafford and PLUS; indicates if student is in default or exceeded the borrowing limits

Electronic Loan Application Form (*RPAELAP* & *RLADBOR*): Stafford and PLUS only; displays certification information, loan status, disbursement schedules, hold/release data

Loan Application Form (*RPALAPP* & *RLADLOR*): Alternative loans only; displays certified amount-these loans are not submitted electronically

Loan Disbursement Form (*RPALDSB*): Displays details for loan disbursement; shows date check received and whether or not the payment has fed to AR

Comments and Logging

<u>Applicant Comments Form</u> (*RHACOMM*): Free form to record important details of interactions with students, actions taken on accounts etc. Form should be reviewed prior to/while counseling a student. Staff should always record the details of what they have done to a student's record via this form. This form has been replaced by the RightNow CRM.

<u>Logging Activity Inquiry</u> (*ROILOGA*): Inquiry form used to view inserts, updates, and deletes that are recorded by the system as a means to audit activity. If something has changed on a record and you would like to know the previous value this form may help. However, not all data is logged.

Letters

<u>Applicant Mail Form</u> (*RUAMAIL*): Displays details for letters and emails, such as they type of letter, what aid year the letter/email are from, the date the letters were printed, and who printed them.

Misc.

<u>Drexel Central Form</u> (*GZOIFASI*): Displays overall details for student as it relates to their status in Financial Aid, Bursar and Registrar. Used by Drexel Central office for customer service

<u>Applicant User-Defined Data</u> (*ROUASDF*): Displays aid year specific data for student, including the Institutional Financial Aid Application data from the Electronic FAAPP, awards and NCP/CSS flags etc.

<u>Applicant Non Year User-Defined Data</u> (*ROANYUD*): Displays data for student not specific to any aid year, including Drexel Grant/AJ Drexel awards, rolling term award amounts etc.

Section G: User Preferences

User preferences can be accessed from the Main Menu by clicking on the **FILE** menu and selecting **PREFERENCES**. It can also be accessed by typing **GUAUPRF** in the **Go To…** field.

B.   Display Options

Figure 19

1. The Display Options section allows you to customize what displays in the menu and title bars. **See Figure 26**
2. The User Interface Color Settings section allows you to customize colors for various sections of Banner, such as buttons, canvas, menu links, etc. To change the color setting, click on the drop-down arrow next to User Value and select a color. Then click Save.
3. The My Links tab allows you to customize the Personal Links that appear on the main menu. To add a Personal Link, click in the User Value field for the link description and type a description for the link, then click in the User Value field for the link and type the actual link. Be sure to include the http:// for a URL. If you are typing a form name, just type the 7-character name of the form. **See Figure 27**

C.   My Links

Figure 20

Section H: Academic Information & Systems

The **Academic Information & Systems** department provides support to all of Drexel University's academic units and student administrative offices. Need Help? Submit a ticket to one of the queues listed below, which will allow all analysts in the designated group to review your inquiry.

Name of Queue	Target Population
ais_accounts@drexel.edu	Experiencing an issue with an existing account.
ais_admissions@drexel.edu	Enrollment Management
ais_dc@drexel.edu	Drexel Central
ais_fa@drexel.edu	Financial Aid
ais_student@drexel.edu	Academic or Student Life related department that reports to the Provost.
ais_scdc@drexel.edu	Steinbright Career Development Center

Academic Information & Systems website - http://www.drexel.edu/ais/