



Texas State University-San Marcos Banner 9 Introduction

Vol.2

*Banner 9
Updated February 2018*

Security of Confidential and Sensitive Information

Appropriate Use and Security of Confidential and Sensitive Information

Due to the integration of Student modules in Banner, it is imperative that you understand the importance of records security in regard to the access you may have in Banner. You may be granted access to information beyond what you need to perform your assigned office duties, but you should adhere to only the areas you are responsible for. Your access into Banner has been granted based on job duties and it is your responsibility to ensure the information you have access to is used appropriately.

Because you have access to confidential information for currently enrolled and former students, it is important that you comply with and are aware of the **FERPA Act of 1974** (Family Education Rights Privacy Act). All information, unless you have been given written consent from the student, should be used for legitimate educational purposes only.

Always as a precaution, below are some good standards you should always follow.

- Do not share your password(s) or store them in an unsecured manner.
- Do not leave your workstation unattended, it is your responsibility to keep any activity attached to your login id secured.
- Do not share any confidential and sensitive information with anyone, including colleagues, unless there it is to be used for business purposes.
- Do not leave any documentation that has any identifiable information pertaining to a student on your workstation without you being there to secure and protect it.
- ALWAYS, securely dispose of all documents, reports, screen prints, and/or handouts that contain confidential and sensitive information by destroying or shredding up those documents.

If and when, a student requests for our office to place a Privacy Hold on their record our staff is not allowed to release any information without a written consent.

Texas State has designated the following information as directory information:

- Name
- Date/Place of Birth
- Dates of attendance
- Enrollment status
- Names of prospective graduates
- Participation in officially recognized activities and sports
- Student classification
- Telephone number
- Names of parents
- Previous education
- Weight and height of athletes
- Degrees, certificates and awards received
- Fields of study
- Parking permit records
- Photographs of students
- Types of awards received
- Current and permanent addresses
- Any other record that could be treated as directory information under FERPA

Forms

[Grant Access to Student Records](#) (formerly *Student Authorization Release Form*)

[Revoke Access to Student Records](#)

[Parental Affidavit of Dependency](#) (formerly *Parental Access Affidavit*)

FERPA – Office of the University Registrar Link: <http://www.registrar.txstate.edu/persistent-links/ferpa.html>

Table of Contents

Introduction.....	4
Accessing Banner 9.....	5
Banner 9 Landing Page.....	6
Navigating Open Pages.....	7
Banner Terminology.....	8
Banner Naming Convention.....	9
Semester Terms in Banner.....	10
Search & Filters.....	11
Banner and My Banner Menu.....	13
Using the folder menus.....	13
My Banner (GUAPMNU).....	14
General Preferences (GUAUPRF).....	15

Introduction

Course goal

The goal of this workbook is to provide Departmental Users with the knowledge and practice to manage and register students.

Course Objectives

In this course you will learn how to manage General Student Records

Intended Audience

Chairs, Deans, Advisors and Departmental Administrators

Accessing Banner 9

Banner 9 PROD

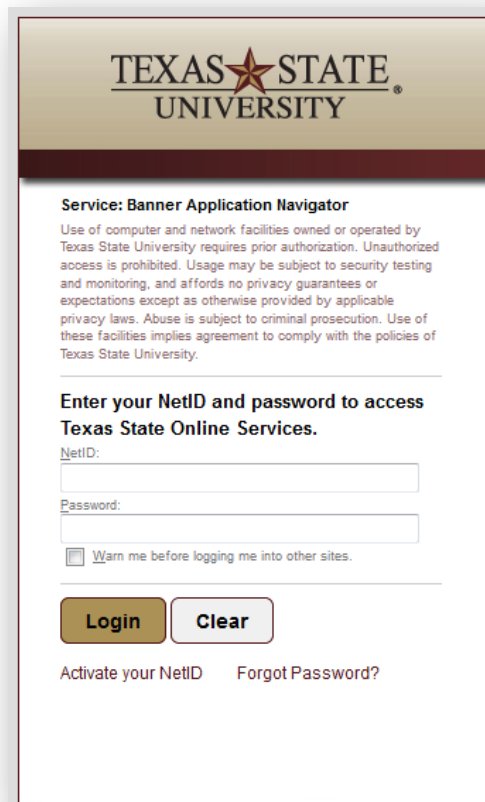
<https://sis.txstate.edu/applicationNavigator/seamless>

TIP: Create a bookmark to access Banner 9!

Banner 9 QUAL

https://loginqa.tr.txstate.edu/a/login?TARGET=https%3A%2F%2Fsis.qual.txstate.edu%2FapplicationNavigator%2Fj_spring_cas_security_check#Application%20Navigator

Note: To log in you must have been granted access. Please visit <http://www.tr.txstate.edu/forms/sis-banner-request.html> for more information. You will need an active NetID and password.



The screenshot shows the login interface for the Banner Application Navigator. At the top is the Texas State University logo. Below it, the service name is displayed. A disclaimer paragraph follows, detailing the university's policies on computer and network facilities. The main section is titled 'Enter your NetID and password to access Texas State Online Services.' and contains two input fields for 'NetID:' and 'Password:'. There is a checkbox for 'Warn me before logging me into other sites.' and two buttons, 'Login' and 'Clear'. At the bottom, there are links for 'Activate your NetID' and 'Forgot Password?'.

TEXAS STATE UNIVERSITY

Service: Banner Application Navigator

Use of computer and network facilities owned or operated by Texas State University requires prior authorization. Unauthorized access is prohibited. Usage may be subject to security testing and monitoring, and affords no privacy guarantees or expectations except as otherwise provided by applicable privacy laws. Abuse is subject to criminal prosecution. Use of these facilities implies agreement to comply with the policies of Texas State University.

Enter your NetID and password to access Texas State Online Services.

NetID:

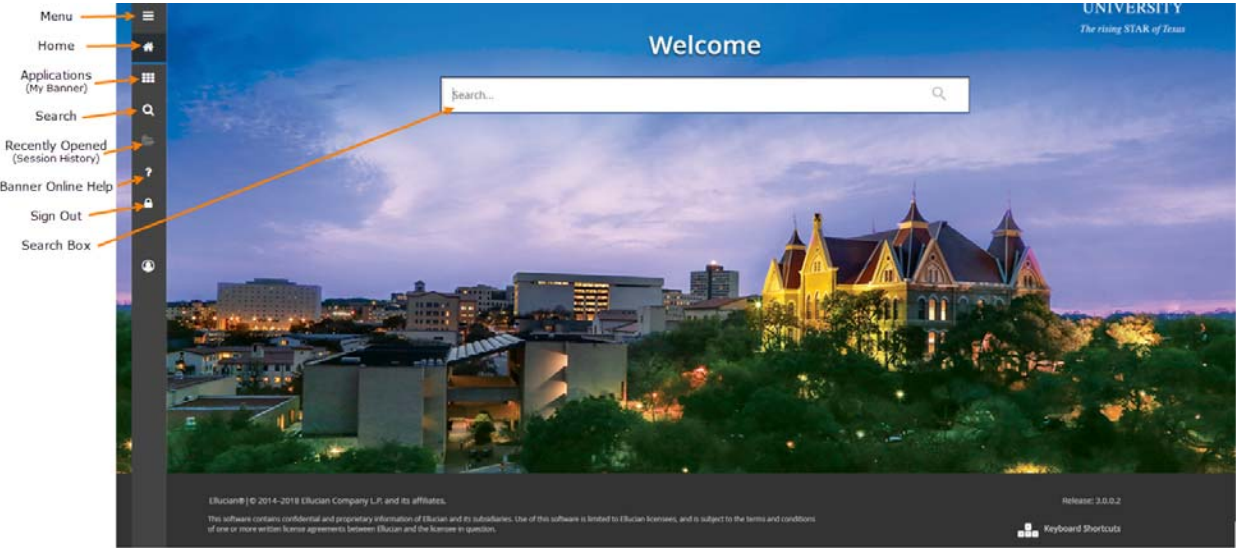
Password:

Warn me before logging me into other sites.

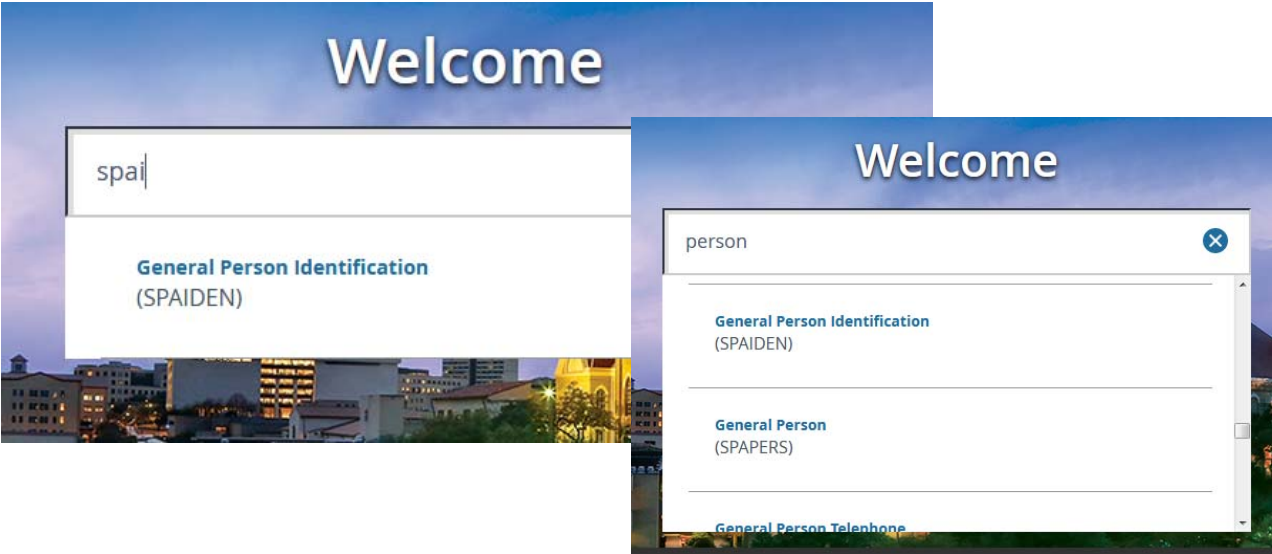
Login **Clear**

[Activate your NetID](#) [Forgot Password?](#)

Banner 9 Landing Page



You may type the entire form/page name in the search field once you log in. Similar to web browser search bars, this allows you to type a Banner descriptive or enter the seven character acronym to open a page.

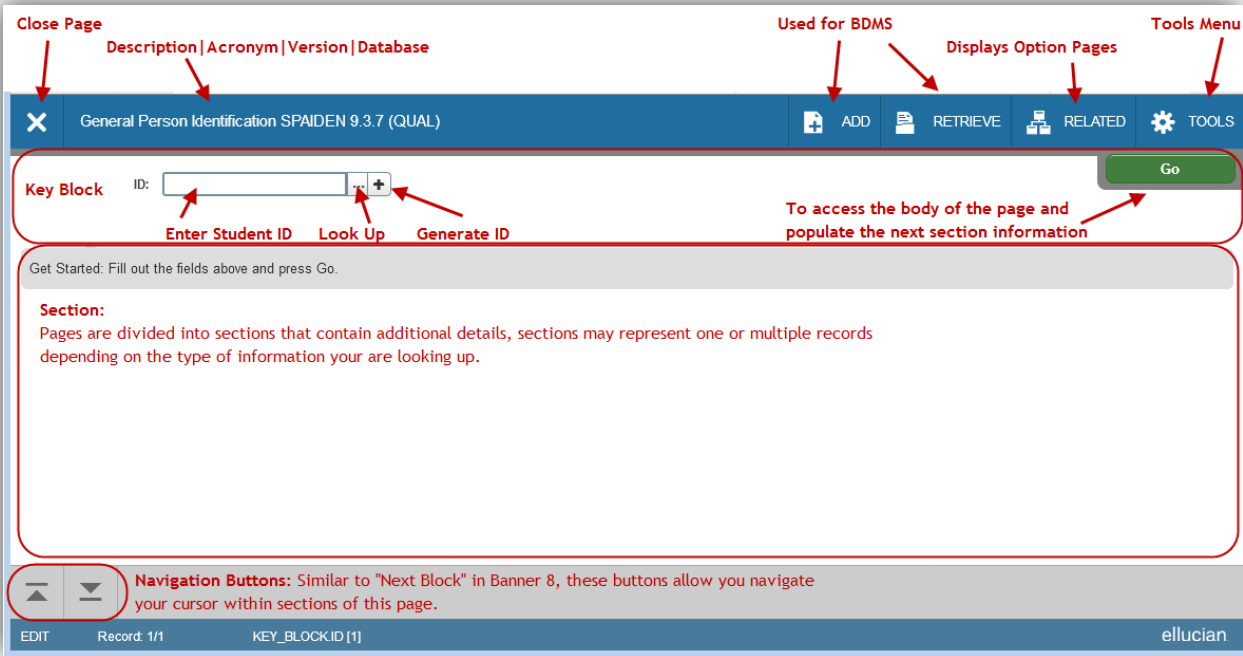


Navigating Open Pages

The following is an example of SPAIDEN – General Person Identification. Each page you access should include a page header (in Blue). This will contain an “X” icon to close the page and take you back to the landing page. The page title includes a **description, acronym, version and database** you are accessing. The **ADD** and **RETRIEVE** icons are tied to BDMS- Banner Document Management System. The **RELATED** icon should display other pages related to the page you have accessed. The **TOOLS** icon is a Tools Menu that includes Refresh, Export, Print, Clear Record, Item Properties, Display ID image and other options controlled by the page.

The **Key Block** in this example requires a student **ID**. In other pages it may require Term, Subject, CRN or other information to proceed to the next section. The “...” icon can be used to Look Up Key information, such as a Student ID. The “+” icon is used to Generate an ID (to be used only by UG and GR Admissions).

The main section with information can only be accessed once an ID had been entered and the “GO” icon has been clicked. Most pages are divided into sections that contain additional information in sub sections and may also contain tabs. To navigate within those sections/sub sections you can use the **Navigation Buttons** below to toggle between sections.



Banner Terminology

Term	Description
Page (Form)	A form is where information will be viewed.
Main Key Block (Key Block)	The key Block is the top portion of a Banner page; this is where you enter key information such as the ID, name, CRN, and Term to bring up information on the form.
Blocks/Sections	Blocks/Sections are the areas on the page.
Tabs	On some forms within Banner, there are tabs – also known as blocks/sections. Select a tab to view the information affiliated with the tab.
Term	Fall, Spring and Summer terms are set up with a unique naming process. Ex: 201810, 201830 & 20150
CRN	Each course <i>section</i> is generated a five digit number that identifies the course section. The registration transactions use the CRN.
Next Section (Next Block)	An icon located in the bottom of banner pages used to activate the information on the page or proceed to next section.
Previous Section (Previous Block)	An icon located in the bottom of banner pages used to move back to a previous sections.
Start Over (Roll Back)	To move back to the Key Block area.
Save	To save information entered on a page.
Exit Form	To close out of the current page, click the “X” (Exit) icon in the top left corner.

Banner Naming Convention

- Position 1: Identifies the *system* which owns the form
- Position 2: Identifies the *application module* which owns the form
- Position 3: Identifies the *type* of form
- Position 4-7: A *short description* of what the form is

Example: SPAIDEN

- Position 1: **S** *System* is a Student application
- Position 2: **P** *Application* is a Person
- Position 3: **A** *Form* is an Application
- Position 4-7: **IDEN** *Form* is an Identification Form

SAAADMS		SZAREGS	
S	Student	S	Student
A	Admissions	Z	Registration
A	Application	A	Application
ADMS	Admissions Application	REGS	Student Course Registration
SCACRSE		SSASECT	
S	Student	S	Student
C	Catalog	S	Schedule
A	Application	A	Application
CRSE	Basic Course Information	SECT	Schedule – course sections
SOAPCOL		SGASTDN	
S	Student	S	Student
O	Overall	G	General Student
A	Application	A	Application
PCOL	Prior College Information	STDN	General Student Information

Semester Terms in Banner

Terms represent the academic year and semester. Term abbreviations are 6 characters long and consist of 2 parts:

1st - 4th position	5th - 6th position
Represents the Academic Year Fall through Summer (September - August)	Represents the semester: 10 = Fall 30 = Spring 50 = Summer

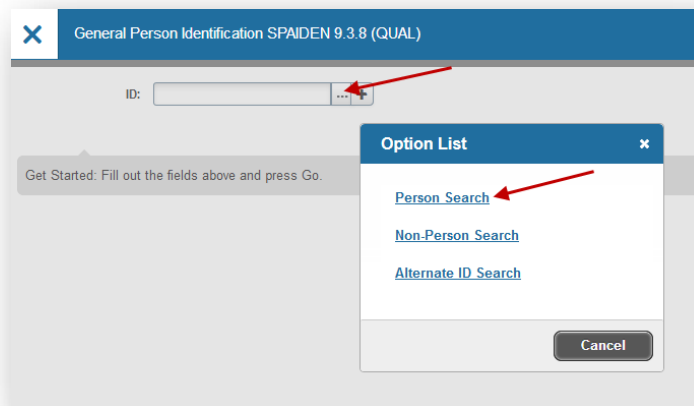
Academic Year	Term – Credit Activity	
	Semester	Code
2017 – 2018	Fall 2017	201810
	Spring 2018	201830
	Summer 2018	201850
2018 – 2019	Fall 2018	201910
	Spring 2019	201930
	Summer 2019	201950
2019 - 2020	Fall 2019	202010
	Spring 2020	202030
	Summer 2020	202050

Search & Filters

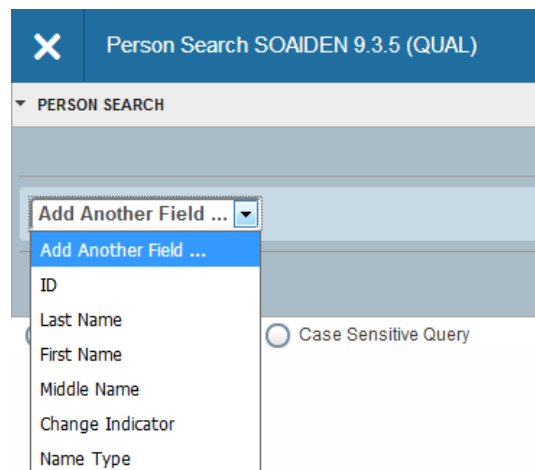
You are able to perform searches for information using the filter functions in Banner pages. In the following example we will look for the ID using **SPAIDEN**.

Filtering Data/Searching (Student ID Search)

Click the ... icon next to ID field, Select Person Search



Choose the field you want to filter from the **Add Another Field** drop-down list

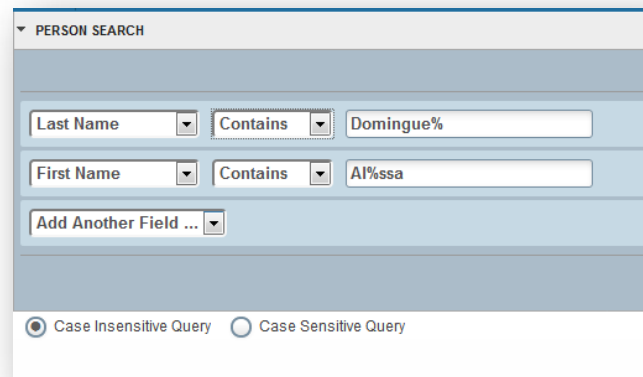


You may also see a Basic Filter *Advanced Filter* set up. Fill in information and click Go.



The image shows a 'Basic Filter' interface. At the top, there are two tabs: 'Basic Filter' (selected) and 'Advanced Filter'. Below the tabs, there are five input fields: 'ID', 'Last Name', 'First Name', 'Middle Name', and 'Change Indicator'. Each field has a small circular icon to its right. To the right of these fields is a dropdown menu labeled 'Add Another Field ...'.

The available operators depend on the type of field (numeric, alphanumeric, date, check box, or other.) The Contains operator is available for alphanumeric and other fields only. Enter a Value for the field that you selected.



The image shows a 'PERSON SEARCH' filter interface. It has a title bar with a dropdown arrow and the text 'PERSON SEARCH'. Below the title bar, there are two rows of filter criteria. The first row has a dropdown menu for 'Last Name', a dropdown menu for 'Contains', and a text input field containing 'Domingue%'. The second row has a dropdown menu for 'First Name', a dropdown menu for 'Contains', and a text input field containing 'A%ssa'. Below these rows is a dropdown menu labeled 'Add Another Field ...'. At the bottom of the interface, there are two radio buttons: 'Case Insensitive Query' (selected) and 'Case Sensitive Query'.

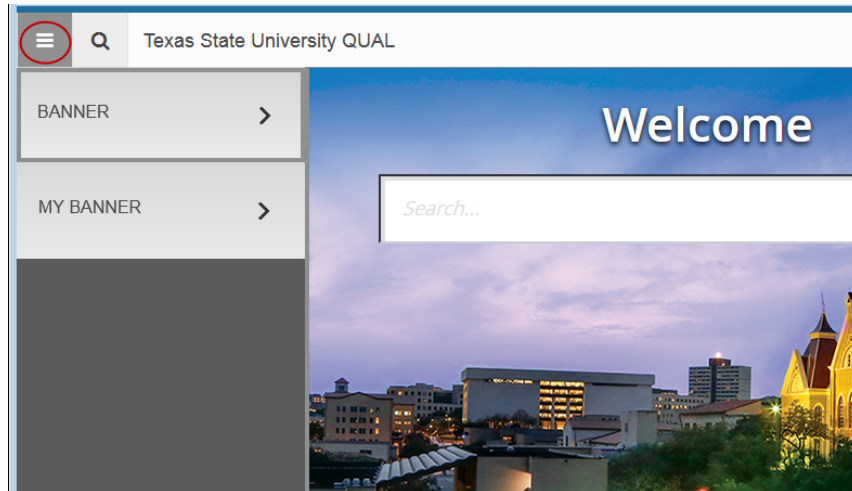
Optional: if you want to add another field to the filter criteria, choose a field from the **Add Another Field** box, select an operator from the contains field and enter a value for the field that you selected. Repeat this step until all filter criteria are entered.

When all the criteria is entered, click **Go** to display the filter results. The number of records retrieved is displayed. The results for a field can be sorted in ascending or descending order by clicking on the field label in the column header. You can reverse the sort by clicking the field label again.

Double click on the record you wish to see or you may filter data in a section if there is an active Filter icon in the section header.

Banner and My Banner Menu

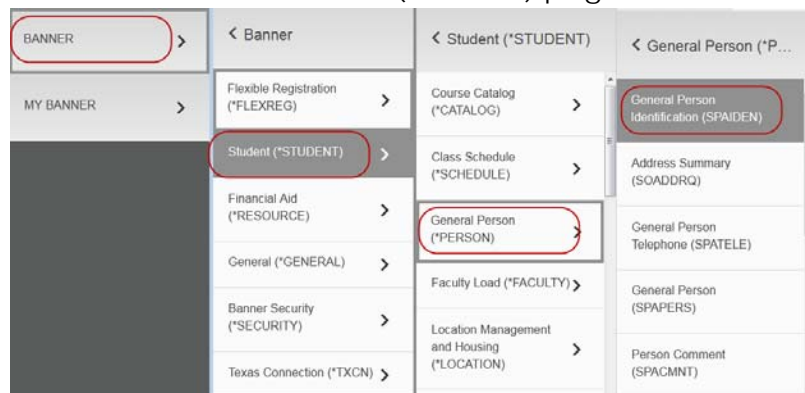
The menu button located at the top left corner allows you to select from the Banner or My Banner Menu. The Banner Menu will display a list of modules you have been granted to use. The My Banner menu will list pages set up in GUAPMNU as your favorites.



Using the folder menus

The following is an example of the Banner Menu and accessing SPAIDEN.

1. Select the BANNER menu.
2. Select the STUDENT menu
3. Select the General Person menu
4. Select the General Person Identification (SPAIDEN) page



My Banner (GUAPMNU)

The purpose of this section is to explain the process of building your My Banner menu.

My Banner (GUAPMNU) is a page used to save commonly used forms for easy access.

1. Access **My Banner Maintenance** (GUAPMNU)
2. Type page acronyms under **Object** you wish to access easily (your favorites).
3. **Tab** to auto populate the Description field.
4. The Descriptions can be reworded to mean something that helps you remember what the page is used for and will only save on your own Banner account.
5. Continue adding forms as necessary.
6. Save [F10].
7. You will have to log out and log back in to see your forms appear under **My Banner**.

Tip: Add GUAPMNU at the end!

My Banner Maintenance GUAPMNU 9.0 (QUAL)

ADD RETRIEVE RELATED TOOLS

MENU MAINTENANCE Insert Delete Copy Filter

Type * Oracle Forms module

Object *	Description *
TSA1098	1098-T Tax Information
RNAOV14	2013-2014 Applicant Ow
READI14	2013-2014 Grant Disburs
REAOR14	2013-2014 Grant Origina
RNIMS14	2013-2014 Miscellaneou
RNANA14	2013-2014 Need Analyssi
RNAVR14	2013-2014 Need Analyssi
RNRGL14	2013-2014 Need Analyssi
RNAPR14	2013-2014 Need Analyssi
RNARS14	2013-2014 Need Analyssi
RNASL14	2013-2014 Student Loan
RNASU14	2013-2014 Supplementa

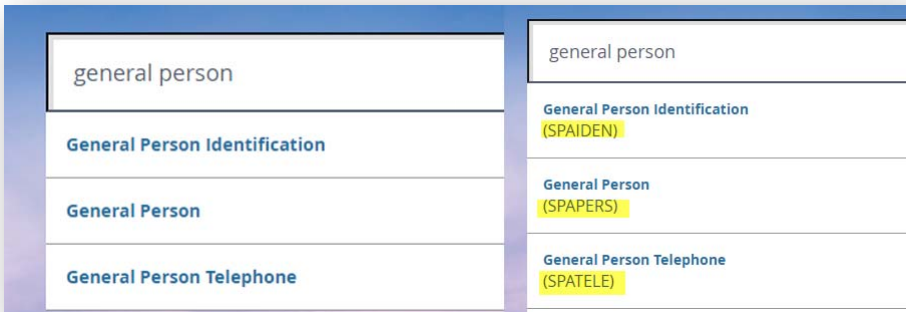
Object	Description
SFIWLNT	Waitlist - Who got notified?
SFAWLPR	Waitlist - Who else is waiting?
SSASECQ	Schedule Section Query
SFASTCA	1. Audit Trail
SPAIDEN	Contact Info
GUAPMNU	Favorites Setup

Insert Selection Remove Selection Insert All Remove All

EDIT Record: 25/26 CURMENU.DISPLAY_DESC [25] ellucian

General Preferences (GUAUPRF)

The purpose of this section is to ensure the Banner form acronyms appear and that the Header Rows in your extract are included.



General User Preferences Maintenance (GUAUPRF) is a page used to update and save the two display options mentioned above.

Access **General User Preferences Maintenance (GUAUPRF)**

- 1. **Add a check** next to Display Form Name on Menu.
- 2. **Add a check** next to Include Header in Data Extract.
- 3. Save [F10].
- 4. You will have to log out and log back in to see your forms acronyms appear.

