



Texas State University Banner 9 Introduction Vol. 1

Banner 9
Updated October 2023

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.

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 regarding 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 to 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 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 those documents.

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

Texas State has designated the following information as directory information:

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

[Bobcat Family Portal](#) allows parents and family members to connect with their student by sending them a request to access their records. The day after the request is approved by the student, they will have access to view their information. Before you release any information about a student you must first check that the parent or family member is authorized through the [Bobcat Family Portal](#).

FERPA – Office of the University Registrar Link: <https://www.registrar.txst.edu/legislative-policies/ferpa.html>

Table of Contents

Introduction..... 2

SECURITY OF CONFIDENTIAL AND SENSITIVE INFORMATION..... 3

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

Common Banner Errors..... 16

 The White Screen 16

Accessing Banner 9

Start from www.txst.edu

On “Info For”, select “Faculty & Staff”.

Click on “CATSWEB”.

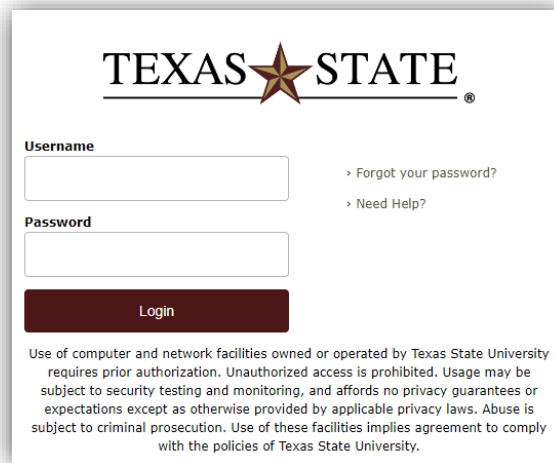
Click on “Faculty & Staff Menu”

Under the **Business Services Menu**, select “Banner 9”.

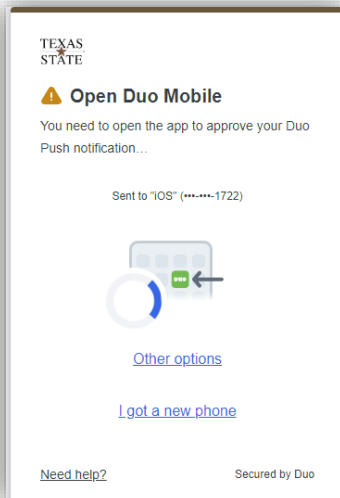
<https://appnav-prod.ec.txstate.edu/applicationNavigator/seamless>

Tip: Create a bookmark to access Banner 9!

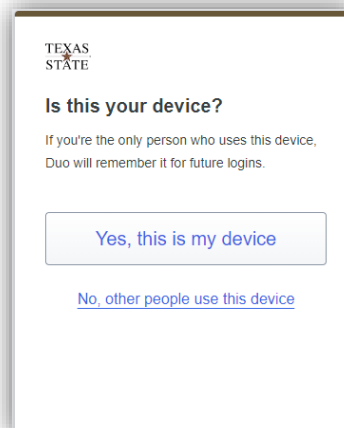
Note: To log in, you must have been granted access. Please visit <https://itac.txst.edu/support/sis.html> for more information. You will need an active NetID and password.



The login page features the Texas State University logo at the top. Below it are two input fields: "Username" and "Password". To the right of the "Username" field are two links: "> Forgot your password?" and "> Need Help?". Below the "Password" field is a dark red "Login" button. At the bottom, there is a disclaimer: "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."

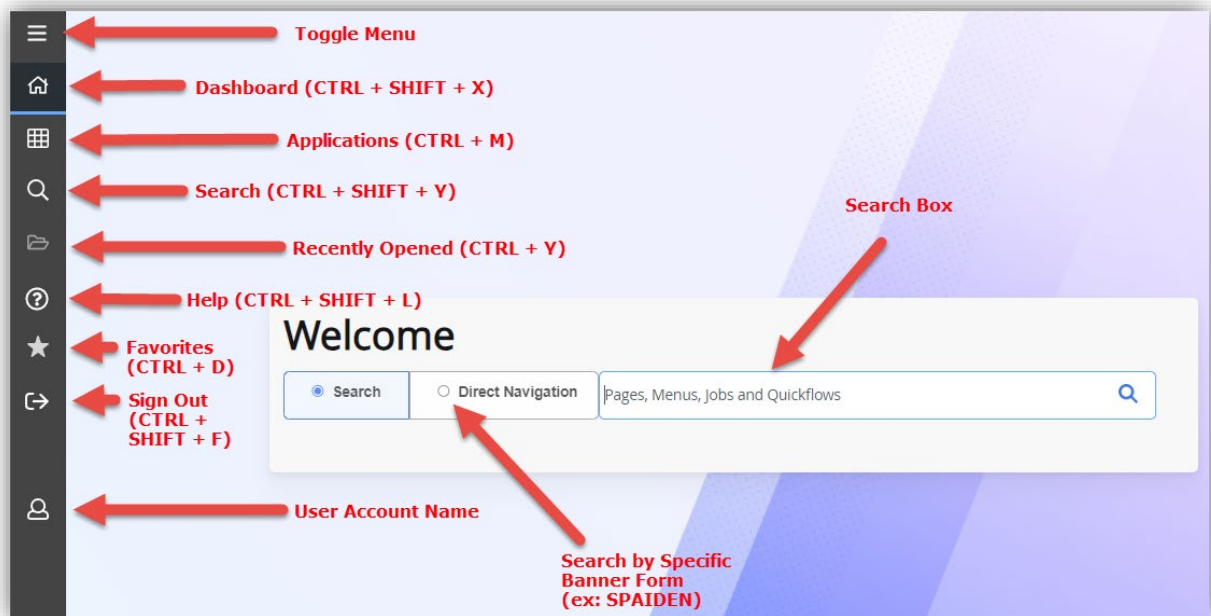


This screen is titled "Open Duo Mobile" with a warning icon. It states: "You need to open the app to approve your Duo Push notification...". Below this, it says "Sent to 'iOS' (****-****-1722)". There is a graphic of a smartphone with a Duo push notification. Below the graphic are two links: "Other options" and "I got a new phone". At the bottom, there are two links: "Need help?" and "Secured by Duo".

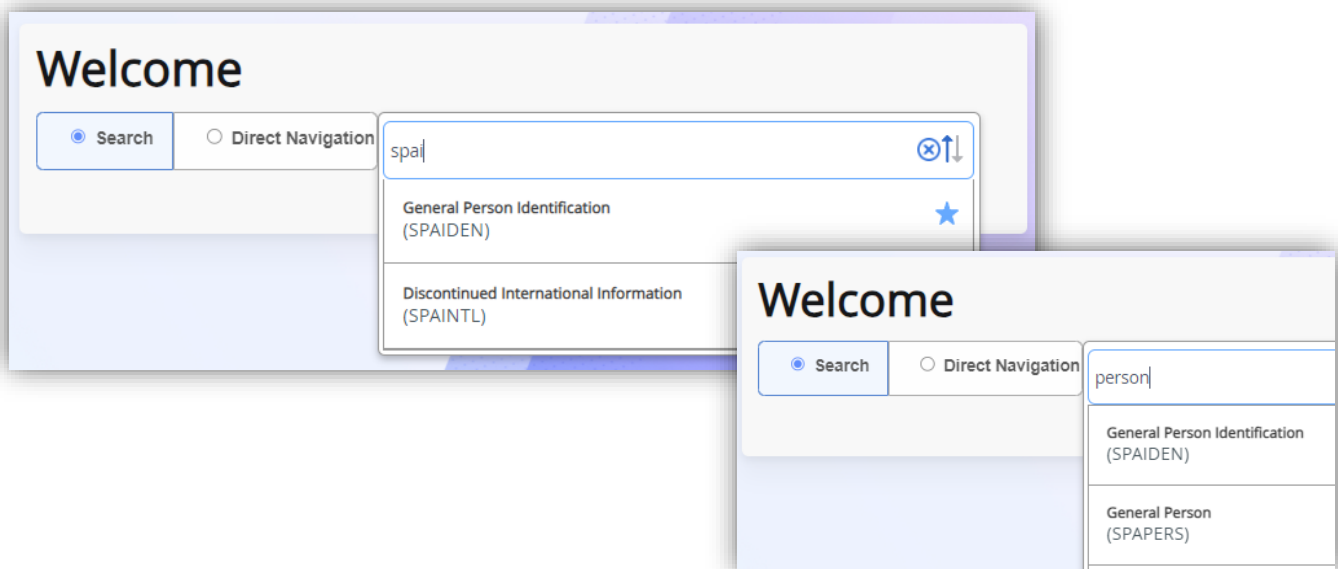


This screen is titled "Is this your device?" with the Texas State University logo. It states: "If you're the only person who uses this device, Duo will remember it for future logins." Below this is a large blue button that says "Yes, this is my device". At the bottom, there is a link: "No, other people use this device".

Banner 9 Landing Page



You may type the entire form/page name in the search box when “Search” is selected once you log in. Like web browser search bars, this allows you to type a Banner descriptive or enter the seven-character acronym to open a page. Selecting “Direct Navigation” requires the seven-character acronym and will take you straight to the form.



Navigating Open Pages

The following is an example of SPAIDEN – General Person Identification. Each page you access should include a page header (in maroon). This will contain an “X” icon to close the page and take you back to the landing page or dashboard. The page title includes a **description, acronym, 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, Clear Data, 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 screenshot shows the SPAIDEN – General Person Identification (PROD) interface. A maroon header bar contains a close button (X), the title "General Person Identification SPAIDEN (PROD)", and icons for ADD, RETRIEVE, RELATED, TOOLS, and a notification bell. Below the header, a "Key Block" section contains an "ID:" field with a "..." icon (labeled "Look Up") and a "+" icon (labeled "Generate ID"). A "Go" button is to the right. Red arrows point to the close button (labeled "Close Page (CTRL + Q)"), the title bar (labeled "Description | Acronym | Database"), the ID field (labeled "Enter Student ID"), the "Look Up" icon, the "Generate ID" icon, and the "Go" button (labeled "To access the body of the page and populate the next section information"). Below the "Key Block" is a grey box with the text: "Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER." Below this is a large white section titled "Section:" with the text: "Pages are divided into sections that contain additional details, sections may represent one or multiple records depending on the type of information you are looking up." At the bottom, a grey bar contains "Navigation Buttons" (left and right arrows) and the text: "Navigation Buttons: Similar to 'Next Block' in Banner 8, these buttons allow you to navigate your cursor within sections of this page." The footer bar shows "EDIT", "Record: 1/1", "KEY_BLOCK.ID [1]", "©2000 - 2023. Ellucian. All rights reserved.", and the "ellucian." logo.

The main section with information can only be accessed once an ID has 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 with in 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, or 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: 202410, 202430, & 202450
CRN	Each course <u>section</u> is generated a five-digit number that identifies the course section. The registration transactions use the course reference number (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 the next section.
Previous Section (Previous Block)	An icon located in the bottom of Banner pages used to move back to a previous section.
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:

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

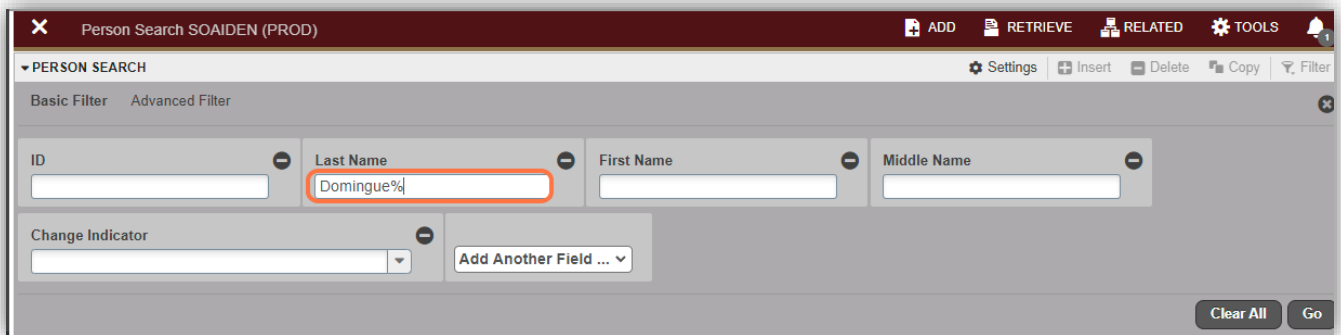
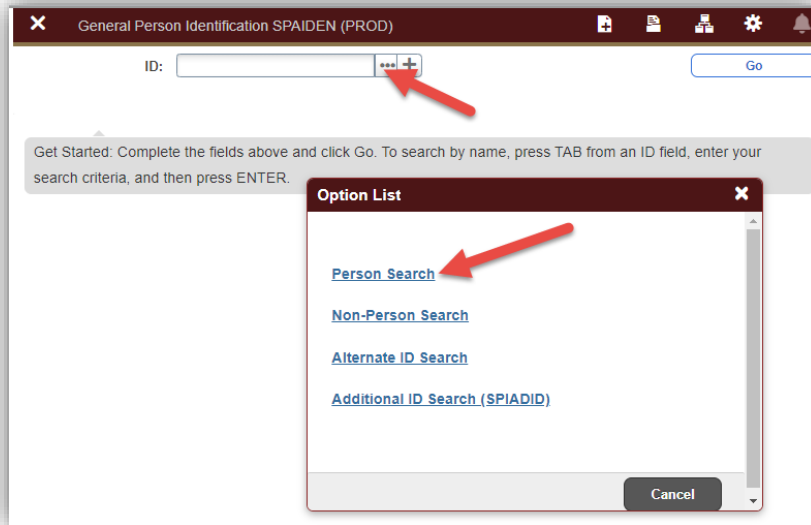
Academic Year	Term – Credit Activity	
	Semester	Code
2023 – 2024	Fall 2023	202410
	Spring 2024	202430
	Summer 2024	202450
2024 - 2025	Fall 2024	202510
	Spring 2025	202530
	Summer 2025	202550

Search & Filters

You can 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 the ID field, select Person Search



Note: Use wildcards, % - represents multiple character search and an underscore _ - represents a single character search

A05123% = show all student IDs that begin with A05123XXX

12/%/2003 = show all records where person was born in December of 2003

Domingue% = show all records where last name begins with Domingue

AL_ssa = show all records where first name begins with AL and ends in sa

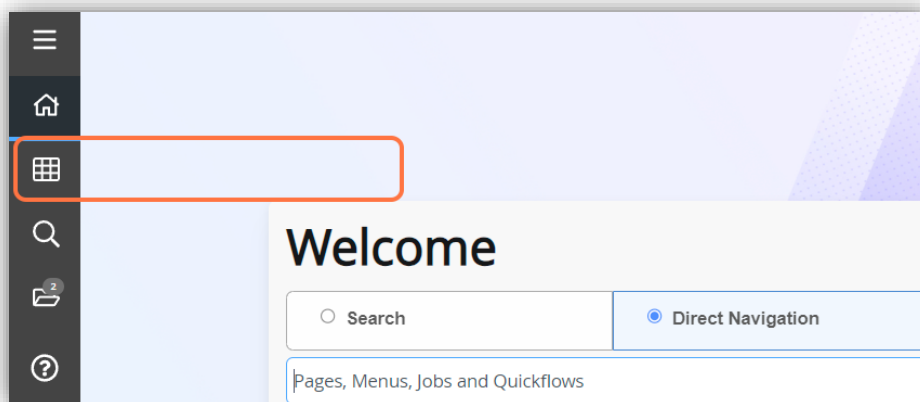
Optional: if you want to add another field to the filter criteria, choose a field from the **Add Another Field**. Repeat this step until all filter criteria are entered.

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

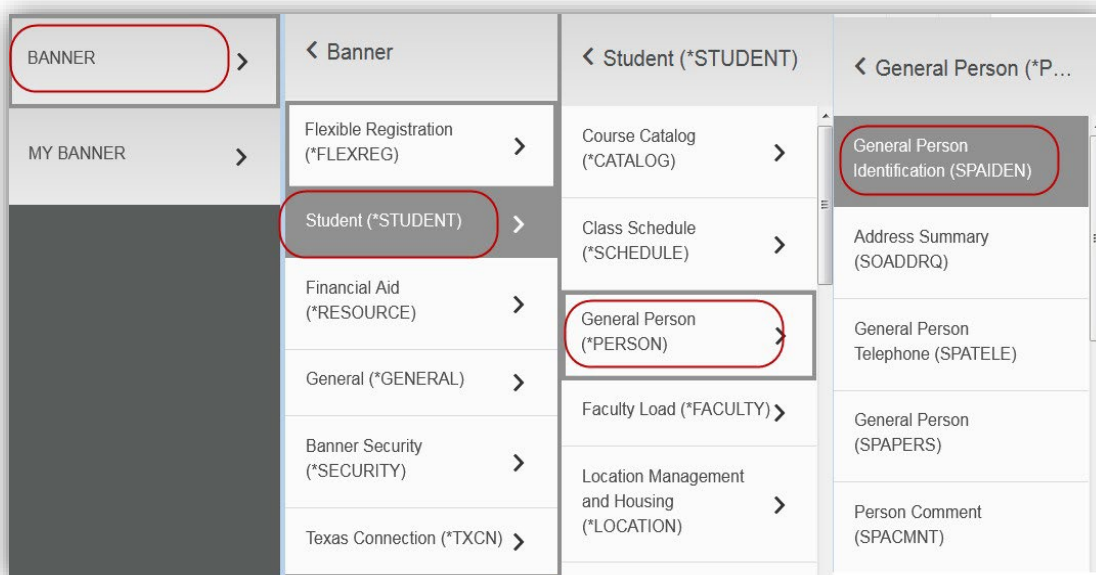
The Applications button located at the top left side allows you to select from the Banner or My Banner Menu. The Banner Menu will display a list of modules you have been granted to use. The My Banner Menu will list pages set up in GUAPMENU as your favorites.



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 re-worded 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 desired.
6. Save [F10].
7. You will have to log out and log back in to see your forms appear under **My Banner**.

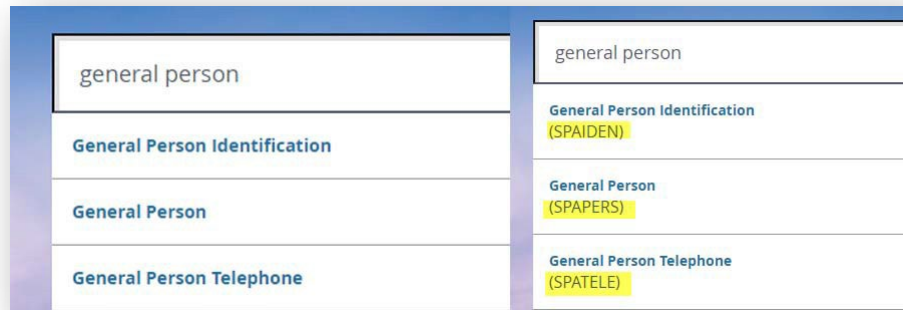
Object *	Description *
TSA1098	1098-T Tax Information
RNAOV14	2013-2014 Applicant Ow
READI14	2013-2014 Grant Disburs
REAOR14	2013-2014 Grant Origina
RNIMS14	2013-2014 Miscellaneous
RNANA14	2013-2014 Need Analysis
RNAVR14	2013-2014 Need Analysis
RNRGL14	2013-2014 Need Analysis
RNAPR14	2013-2014 Need Analysis
RNARS14	2013-2014 Need Analysis
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

Tip: Add GUAPMNU at the end!

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.



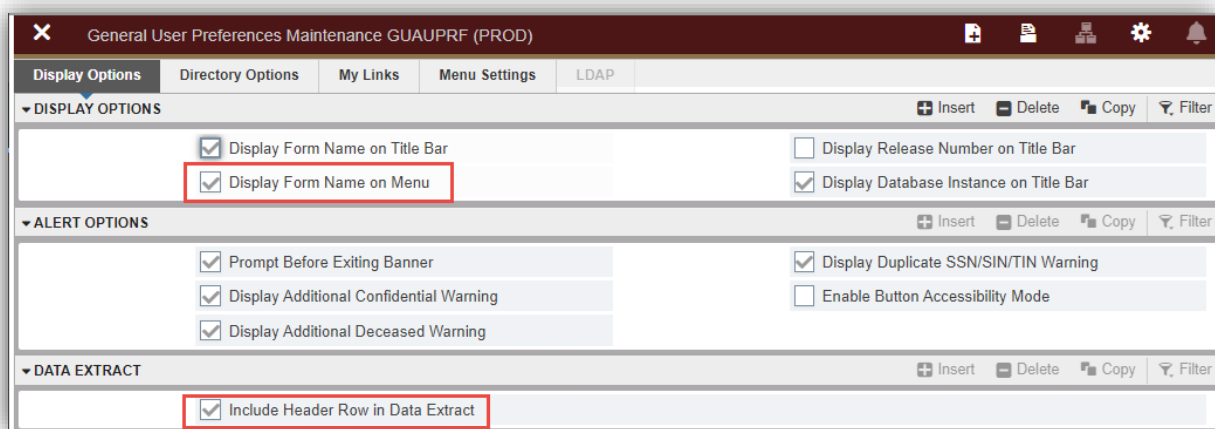
This screenshot shows two side-by-side panels of Banner form acronyms. The left panel has a blue header and lists 'general person', 'General Person Identification', 'General Person', and 'General Person Telephone'. The right panel has a white header and lists 'general person', 'General Person Identification (SPAIDEN)', 'General Person (SPAPERS)', and 'General Person Telephone (SPATELE)'. The acronyms in the right panel are highlighted in yellow.

general person
General Person Identification (SPAIDEN)
General Person (SPAPERS)
General Person Telephone (SPATELE)

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.



This screenshot shows the 'General User Preferences Maintenance GUAUPRF (PROD)' window. The 'Display Options' tab is selected. The 'DISPLAY OPTIONS' section has two rows: 'Display Form Name on Title Bar' (checked) and 'Display Release Number on Title Bar' (unchecked). The 'Display Form Name on Menu' checkbox is checked and highlighted with a red box. The 'ALERT OPTIONS' section has three rows: 'Prompt Before Exiting Banner' (checked), 'Display Duplicate SSN/SIN/TIN Warning' (checked), and 'Display Additional Confidential Warning' (checked). The 'DATA EXTRACT' section has one row: 'Include Header Row in Data Extract' (checked and highlighted with a red box).

General User Preferences Maintenance GUAUPRF (PROD)	
Display Options	
▼ DISPLAY OPTIONS	
<input checked="" type="checkbox"/> Display Form Name on Title Bar	<input type="checkbox"/> Display Release Number on Title Bar
<input checked="" type="checkbox"/> Display Form Name on Menu	<input checked="" type="checkbox"/> Display Database Instance on Title Bar
▼ ALERT OPTIONS	
<input checked="" type="checkbox"/> Prompt Before Exiting Banner	<input checked="" type="checkbox"/> Display Duplicate SSN/SIN/TIN Warning
<input checked="" type="checkbox"/> Display Additional Confidential Warning	<input type="checkbox"/> Enable Button Accessibility Mode
<input checked="" type="checkbox"/> Display Additional Deceased Warning	
▼ DATA EXTRACT	
<input checked="" type="checkbox"/> Include Header Row in Data Extract	

Common Banner Errors

The White Screen

The “Service Invocation Failed” screen may appear when attempting to open a new page in Banner 9 after a few minutes of inactivity. Simply log out of Banner and access Banner 9 again. This may require several attempts or for you to use an “Incognito Window” or private browsing session.

Google Chrome, Microsoft Edge, Safari

Windows: CTRL + SHIFT + N

Mac: Command + SHIFT + N

Firefox:

Windows: CTRL + SHIFT + P

Mac: Command + SHIFT + P

