

# **Georgian College's**

# **Banner Information System**

Fall 2003  
SCT Banner Version 6.0

**GEORGIAN**  
YOUR COLLEGE • YOUR FUTURE

### **Acknowledgements**

This document was created based on the content of:

College of William and Mary. Project MAST: Mastering administrative systems & technologies: General overview training. Spring 2003, Available: <http://mast.wm.edu/bannerhelp/OverviewHandout.pdf> .

SCT Banner. Using SCT Banner: General: Chapter 2. 2002.

## INTRODUCTION

In 2001, Georgian's Board of Governors approved the purchase of a student information system to replace the 17-year old system developed by Georgian's programming team. SCT Banner was selected as the vendor in January 2002. A "vanilla" version – non-customized version - has been installed. Additional functionality will be implemented as time proceeds. The first phase of implementation will be ready for Winter 2004 registration - processes that begin in November 2003.

At approximately the same time when the approval was given to replace the student information system (SIS), an information audit identified the need to develop both the financial (FIS) and human resource (HRIS) information systems into fully functioning decision support systems. System contracts for both FIS and HRIS were coming up for renewal or replacement. The current FIS system will no longer be supported after April 2004. OCAS will no longer support the current HRIS system after April 2004. It is important that the College major information systems be integrated for better decision-making.

It has been decided that FIS and HRIS will be replaced with the appropriate SCT Banner FIS and HRIS modules. FIS will be replaced and implemented for April 2004. The HRIS implementation date has not been determined at this time.

### Implementation timelines:

January 2002	SIS project implementation begins
April 2003	FIS project implementation begins
August 2003	Winter 2004 scheduling using Banner SIS
November 2003	Winter 2004 registration using Banner SIS
November 2003	Go Live - Phase I SIS implementation
April 2004	FIS implementation complete

### Objectives of these three projects include:

- Deploying integrated systems for information management and decision support.
- Extending information management responsibilities and access to the user community by providing better access, ease of navigation, and improved report capabilities.
- Providing comprehensive and on-going education/training to personnel in order to fully utilize the capabilities of the system.
- Maximizing opportunities for direct access by the user community to relevant academic, financial, and personnel information.
- Taking advantage of the features of current and future technology for both on and off campus access.
- Migrating from mainframe to Internet based technology using a software system that is supported, sustained and maintained by SCT.
- Providing support to ensure the successful integration of the Banner applications with other business systems within the college.
- Improving data accuracy and identifying standards and policies that promote data accuracy and integrity.

### Project benefits include:

- Identification and implementation of best practices.
- Improved service to constituents via web-based self-serve applications.
- Improved image through technological currency.
- Improved data quality resulting from conversion and standardization.

Improved understanding of project management methodologies.  
Improved system documentation (maintained by SCT) and improved process documentation (created and maintained by Georgian).  
Improved understanding of standardized business processes between business units.  
Increased access to accurate information by larger stakeholder audience.  
Increased productivity and services.  
Supports larger Ministry of Training, Colleges and Universities information resource management initiative and serves as a model for future change in the college.  
Improved systems foundation for new services, e.g. e-commerce.  
Reduced risk of audit non-compliance through integration and improved reporting.  
Access to vendor supplied maintenance, enhancements and Canadian specific modifications.  
Creates an opportunity to share expertise with other Ontario Banner colleges.

## **Terminology**

As part of the implementation of Banner, there is terminology specific to Banner that Georgian will be using. Refer to the [Terminology](#) document for further clarification.

## **Major Changes from Legacy SIS, FIS, HRIS**

### ***Student Information System***

The implementation of the SIS required the College to modify current naming conventions for programs and course codes. Passing grades and academic progression needed to be reviewed and modified. Some changes are a result of terminology. The length of student identification numbers needed to be revised to fit the Banner ID field length.

Student ID numbers were eight digits in the legacy system. They are now nine digits in Banner. Every student, third-party client, vendor or employee will have a nine digit Banner ID referred to as a General Person ID.

The current view of curriculum, programs and courses, was modified to be as follows:

Students accept into majors in addition to programs. All students taking credit courses, even if offered through Part Time Studies, must declare a major. All students must meet admissions criteria for the major.

Majors are four-character codes.

Program codes are composed of a three-character degree type (credential) followed by the four-character major code.

Course codes are replaced by a four-digit alphabetical subject code and a four-digit course number.

- Subject codes are unique to each academic level (undergraduate, post-graduate, post-secondary, tuition short, non-credit, etc.).
- The first digit of the four-digit course number represents the level of the course: first year, second year, third year, and fourth year.

Examples:

Majors:

- Cabinetmaking – CABI
- Graphic Design – GRDE
- Tourism Management – TOUR

- Early Childhood Education – ECED
- Practical Nursing – PNRS

Program codes:

- Cabinetmaking – OCCCABI
- Graphic Design – ADRGRDE
- Tourism Management – ADCTOUR
- Early Childhood Education – CDRECED
- Practical Nursing – CDRPNRS

Subject codes:

- Aviation – AVIA
- Economics (post-secondary) – ECON
- Economics (university) – ECNM
- Drawing – DRWG
- Electronics – ELEN
- Opticianry – OPTI

There will be one passing grade policy at Georgian; 50% is the passing grade for courses. Academic progression will be based upon a grade point average (GPA). Dean’s List designation will be based upon a cumulative GPA of 4.0 (equivalent to 80%).

Another change is a result of Banner terminology. In the legacy SIS, a section number of a course and the course code was the unique identifier for scheduling and registration processes. In Banner, there is a section number and a course reference number (CRN) to uniquely identify a course section for all processes.

A key part of the admissions, registration, scheduling, and curriculum processes is the term. The code for the term is composed of two parts – the academic year and the semester. Since most of the academic activity during the academic year occurs in the second calendar year, the second calendar year is used for the first four digits, similar to the budget year. The semester is represented by two digits. Credit and non-credit activity have been given different codes. This allows for easier data processing.

Examples:

Academic Year	Term – Credit Activity		Term – Non-credit Activity	
	Semester	Code	Semester	Code
2003-04	Fall 2003	200410	Fall 2003	200415
	Winter 2004	200420	Winter 2004	200425
	Summer 2004	200430	Summer 2004	200435
2004-05	Fall 2004	200510	Fall 2004	200515
	Winter 2005	200520	Winter 2005	200525
	Summer 2005	200530	Summer 2005	200535
2005-06	Fall 2005	200610	Fall 2005	200615
	Winter 2006	200620	Winter 2006	200625
	Summer 2006	200630	Summer 2006	200635

For every term there is at least one part of term. The part of term controls the processes for fee assessments and refunds, and is fundamental to audit reporting for the government. If there is a different start date for a major or if the number of weeks in the semester is different, a new part of term is assigned. The majority of the credit activity occurs in a 14-week semester and has a default

part of term. For the remaining program activity, the part of term represents the number of weeks in the semester. Every major is assigned a part of term for fee assessments for each term.

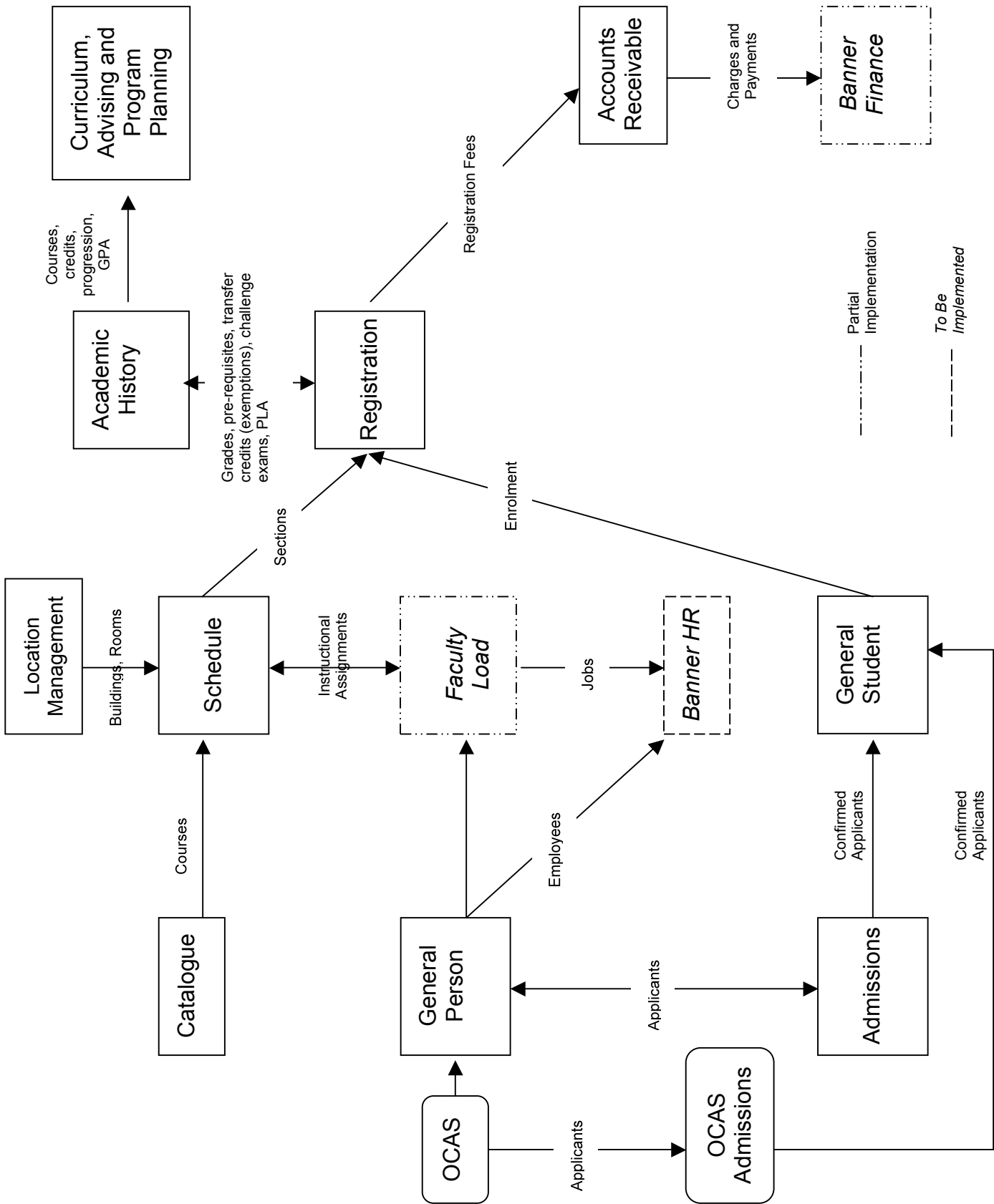
***Financial Information System***

To be determined.

***Human Resources Information System***

To be determined.

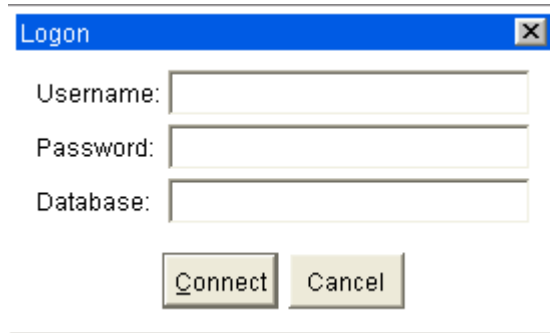
# PICTORIAL VIEW OF ENTIRE BANNER STUDENT INFORMATION SYSTEM



## Banner Main Menu & Log In

Banner runs in an Internet-native environment. All users will access Banner from the URL <http://banner.georgianc.on.ca/>. Users will require a username and password that will be established by the IT Help Desk. Your access and security level will be determined by your job function and all users will sign the Banner Information System Use and User Agreement.

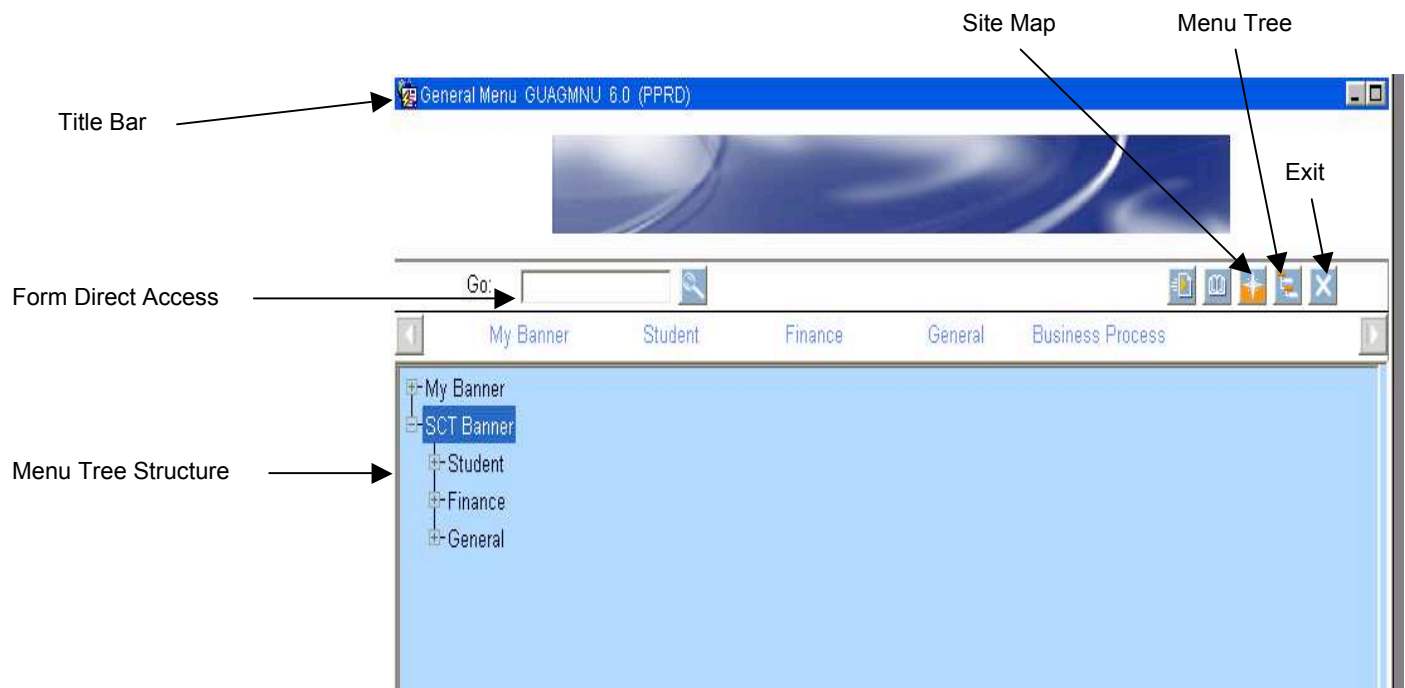
Once Banner is accessed, you will be presented with the following login dialog box.



A screenshot of a Windows-style dialog box titled "Logon". It contains three text input fields labeled "Username:", "Password:", and "Database:". Below the fields are two buttons: "Connect" and "Cancel".

Click in the Username field to enter your username. Click or TAB to the Password field to enter your password. **Immediately change your password the first time you log in to Banner.** Refer to the document Accessing Georgian's Banner Information System for directions to log in, change your password, and to log out.

The main menu screen is presented below.





# FORMS

## Naming Conventions

Banner forms and tables have a seven-character name.

Position 1: Identifies the primary system owning the object.

Position 2: Identifies the module owning the object.

Position 3: Identifies the type of object.

Position 4-7: Uniquely identifies the object.

The primary systems are Finance (**F**), General (**B**), Position Control and HR/Payroll/Personnel (**N, P**), Student (**S**), and Accounts Receivable (**T**). Examples of modules are: accounts payable, general ledger, security, validation form/table, admissions, schedule, employee, student accounts receivable. Examples of types of object are: inquiry form, query form, base table, validation form/table.

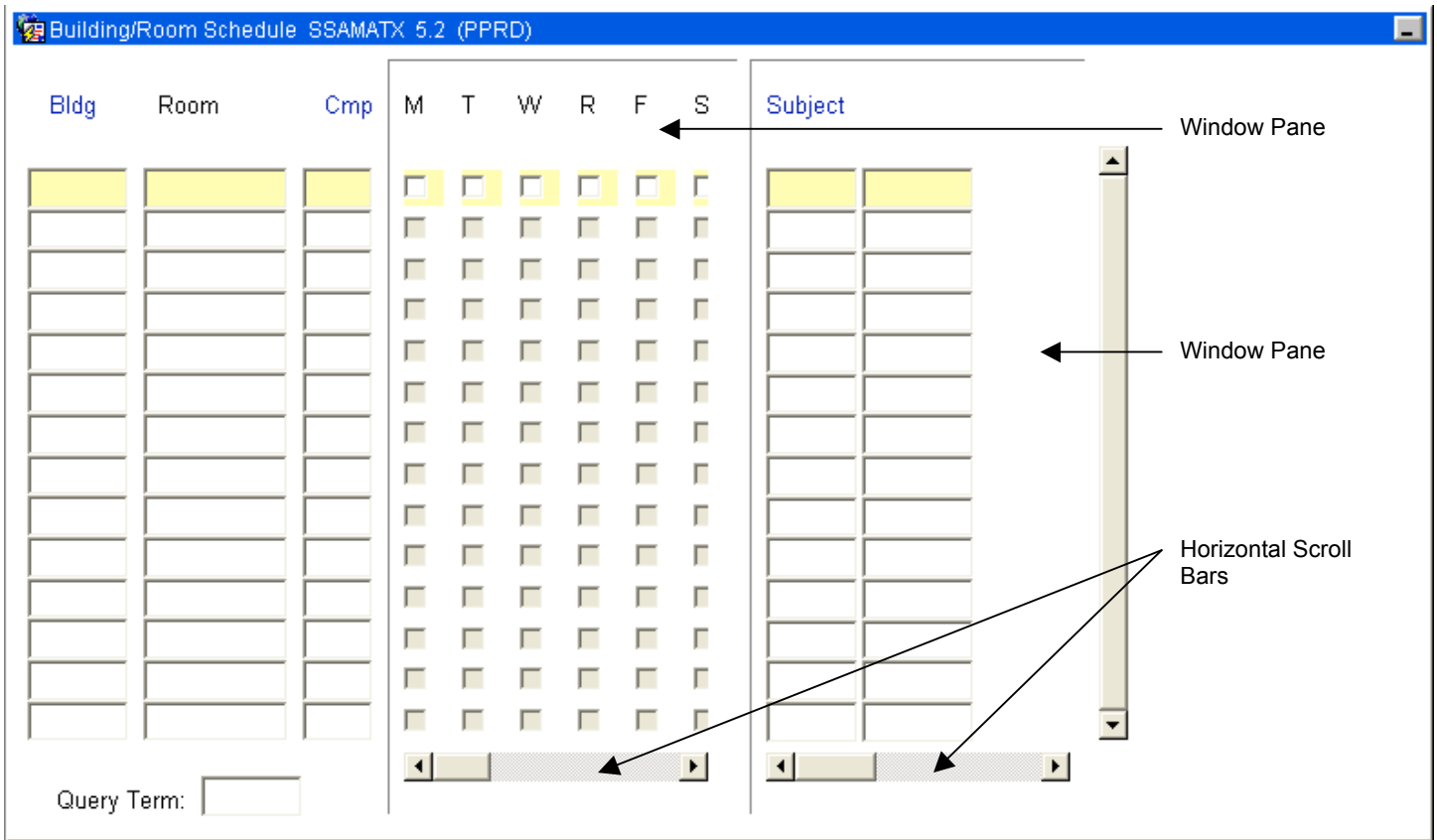
Examples of form and table names:

<b>SFAREGS</b>			
<b>S</b> <i>Student</i>	<b>F</b> <i>Registration/Fee</i>	<b>A</b> <i>Application</i>	<b>REGS</b> <i>Student Course Registration Form</i>
<b>GUAPSWD</b>			
<b>G</b> <i>General</i>	<b>U</b> <i>Utility</i>	<b>A</b> <i>Application</i>	<b>PSWD</b> <i>Password Change Form</i>
<b>FGIBAVL</b>			
<b>F</b> <i>Finance</i>	<b>G</b> <i>General Ledger</i>	<b>I</b> <i>Inquiry</i>	<b>BAVL</b> <i>Budget Availability Status Form</i>
<b>TSADETL</b>			
<b>T</b> <i>Accts Rec</i>	<b>S</b> <i>Student Accts Rec</i>	<b>A</b> <i>Application</i>	<b>DETL</b> <i>Student Account Detail</i>

For further information refer to the document [Naming Conventions of Banner Forms and Tables](#).

## Windows

Some forms are composed of multiple parts called windows. A window pane is an area within a window that has more fields than can appear at one time. There will be a horizontal scroll bar to view the remaining fields in the pane.

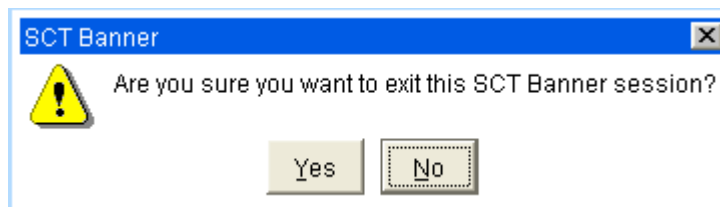


## Form

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 that the information is entered once and then used by other forms or reports.

## Dialog Box

A dialog box is a window that appears when you must choose from two or more responses.



## Alert Box

An alert box is a window that notifies you of a condition that may impact data. An alert box always has one response. You must acknowledge an alert box before you can do anything else on the form.



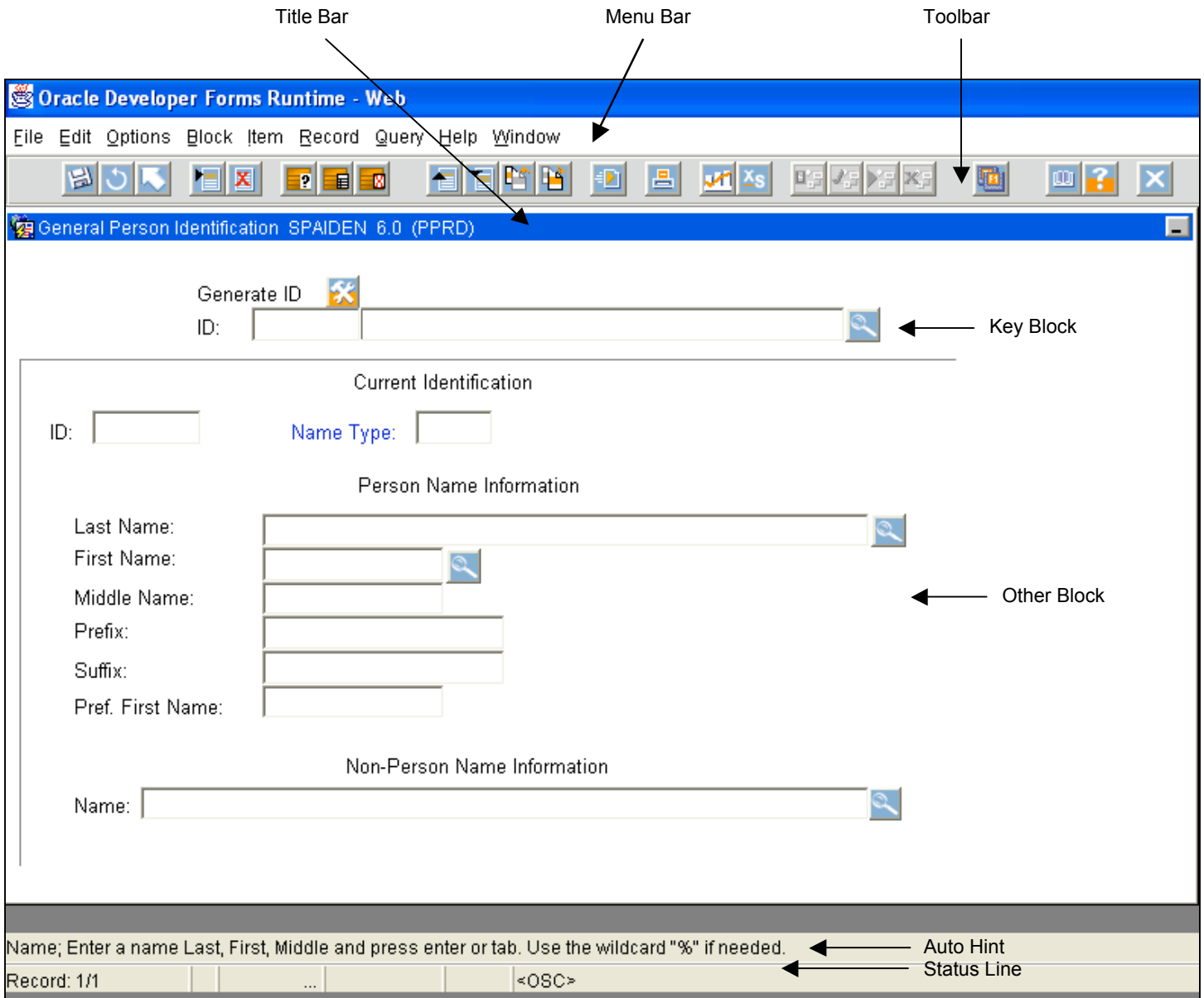
## Types of Forms

There are eight types of forms.

Main Menu	Used to navigate through Banner. It provides an overview of the menus, forms, jobs and QuickFlows in the system.
Application	Used to enter, update, and query information. This is the most common type of form.
Validation	Used to define the values that can be entered in specific fields on application forms. These values are used throughout Banner. These values appear in the List of Values window when you look up a code.
Rule	Used to define the calculations and parameters that impact processing on other forms, reports, and jobs.
Control	Used to define the processing rules for application and validation forms at the system level.
Query	Used to look up existing information. These forms are accessed from another form and cannot be accessed directly from the main menu, by direct access, or with object search.
Inquiry	Used to look up existing information. These forms can be accessed directly from the main menu, from another form, by direct access, or with object search.
Wizard	Used to give step-by-step instructions for completing an application.

Validation, rule, and control forms are used to set up Banner to Georgian's procedural requirements as part of implementation.

## Parts of a Form



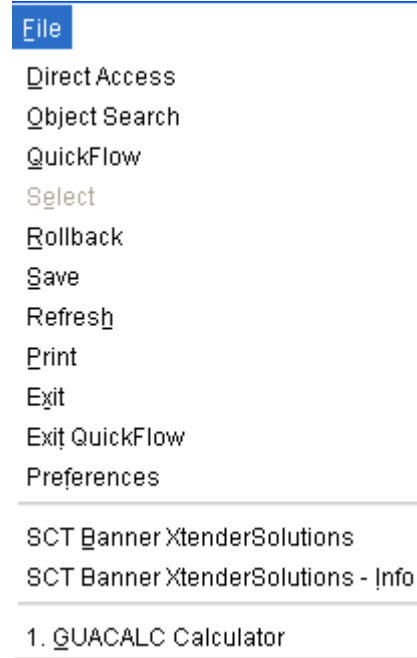
## Menu Bar

The menu bar is located at the top of every form and contains pull-down menus. Menu items are enabled or disabled depending on the form currently being accessed.

### **File Menu**

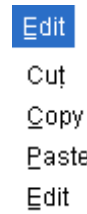
Lists up to the last ten forms the user has accessed.

While in one form, it is possible to access another form by calling Direct Access from the File pull-down menu.



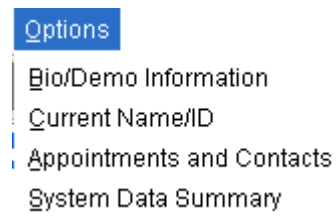
### **Edit Menu**

Functions used to edit text.



### **Options Menu**

This pull-down menu has navigation options. The options are unique to the form currently being accessed. Some options may take the user to a block or window within the current form.



**Sample Only**

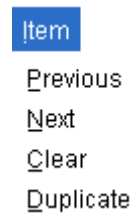
### **Block Menu**

This pull-down menu contains the functions used to navigate among the blocks of information on a form. Note that *Clear* clears information from the current block but does not remove information from any record or table.



### **Item Menu**

This pull-down menu contains the functions used to navigate among the fields or items on a form.



### **Record Menu**

This pull-down menu contains the functions used to work with records on a form. *Remove* will remove all information for the current record and the removed information is deleted when the user saves their work. *Insert* inserts a new blank record into the list of existing records. *Duplicate* duplicates the contents of all fields in the record and copies them into a new record.

### **Record**

- Previous
- Next
- Scroll Up
- Scroll Down
- Clear
- Remove
- Insert
- Duplicate
- Lock

### **Query Menu**

This pull-down menu contains the functions used to query information in the database based on specified criteria.

### **Query**

- Enter
- Execute
- Last Criteria
- Cancel
- Count Hits
- Fetch Next Set

### **Help Menu**

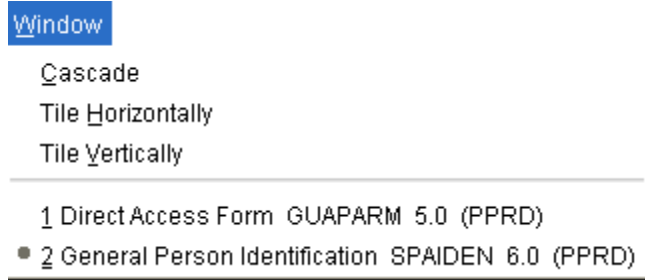
This pull-down menu contains various help tools. *Show Keys* lists the functions and their equivalent keystrokes available for the current form, window, and field. *List* displays the list of values for the current field.

### **Help**

- Online Help
- Dynamic Help Query
- Dynamic Help Edit
- SCT Banner Bookshelf
- Help (Item Properties)
- Show Keys
- List
- Display Error
- Display ID Image
- Calendar
- Calculator
- Extract Data with Key
- Extract Data No Key
- Technical Support ▶
- About SCT Banner

## Window Menu

This pull-down menu lets the user arrange the open windows of a form.

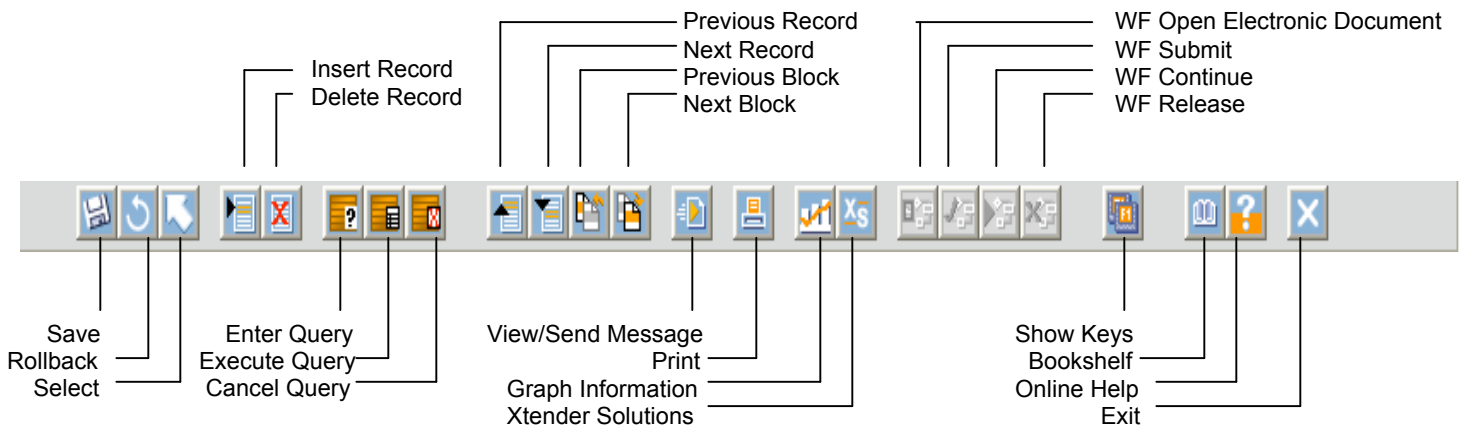







## Mouse and Keyboard












You can perform most Banner functions with either a mouse or keyboard. See the quick reference chart, [Function Key Strokes and Icons Template](#) for a comparison of the keystrokes and mouse by function.

## Toolbar Icons

The horizontal toolbar is directly underneath the form's menu bar. The icons allow you to perform the common functions. The functions have keyboard equivalents and are accessible also from the menu bar.



- 
**Save**  
(F10) Saves all changes made in a form since the last time you saved. Banner also refers to save as **Commit** in some messages.
- 
**Rollback**  
(Shift + F7) Clears all information and returns you to the Key Block of a form. The Key Block is used to select the appropriate record.
- 
**Select**  
(Shift + F3) Enters the highlighted value into the current field of the form you are working from. List of Values uses **OK** as the select.
- 
**Insert Record**  
(F6) Inserts a new blank record into a group of existing records.
- 
**Delete Record**  
(Shift + F6) Deletes all information for a record. When you Save, the record will be deleted from the database.

	<b>Enter Query</b> (F7)	Puts the form into query mode and lets you enter search criteria to see what information is already in the database.
	<b>Execute Query</b> (F8)	In query mode, searches the database and displays any records that match the search criteria.
	<b>Cancel Query</b> (Ctrl + Q)	Cancels a query and takes a form out of query form.
	<b>Previous Record</b> (Shift + ↑)	Moves the cursor to the first enterable field in the record before the current record.
	<b>Next Record</b> (Shift + ↓)	Moves the cursor to the first enterable field in the next record. If the cursor is at the last record, a new record is created.
	<b>Previous Block</b> (Ctrl + PgUp)	Moves the cursor to the previous information block in a form.
	<b>Next Block</b> (Ctrl + PgDn)	Moves the cursor to the next information block in a form. If the next block is in another window of the form, that window will be opened.
	<b>Print</b> (Shift + F8)	Captures the active screen (only what you can see). The print dialog box is displayed from which you can choose a printer to print the active screen.
	<b>Bookshelf</b>	This documentation contains general information for the Banner system.
	<b>Online Help</b>	Displays the Online Help window for the current form.
	<b>Exit</b> (Ctrl + Q)	In a menu, the Exit command takes you out of Banner. In a form, the Exit command takes you out of the form. In query mode, the Exit command cancels the query.

## Title Bar

The title bar shows the descriptive form name, form name based on the naming convention, Banner release number, and the database name.

## Block

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



## Key Block

The first block on most forms contains key information and will determine what is entered or displayed in a form. To move from the key block, perform a **Next Block** function. The key block will remain on the form as subsequent blocks appear.

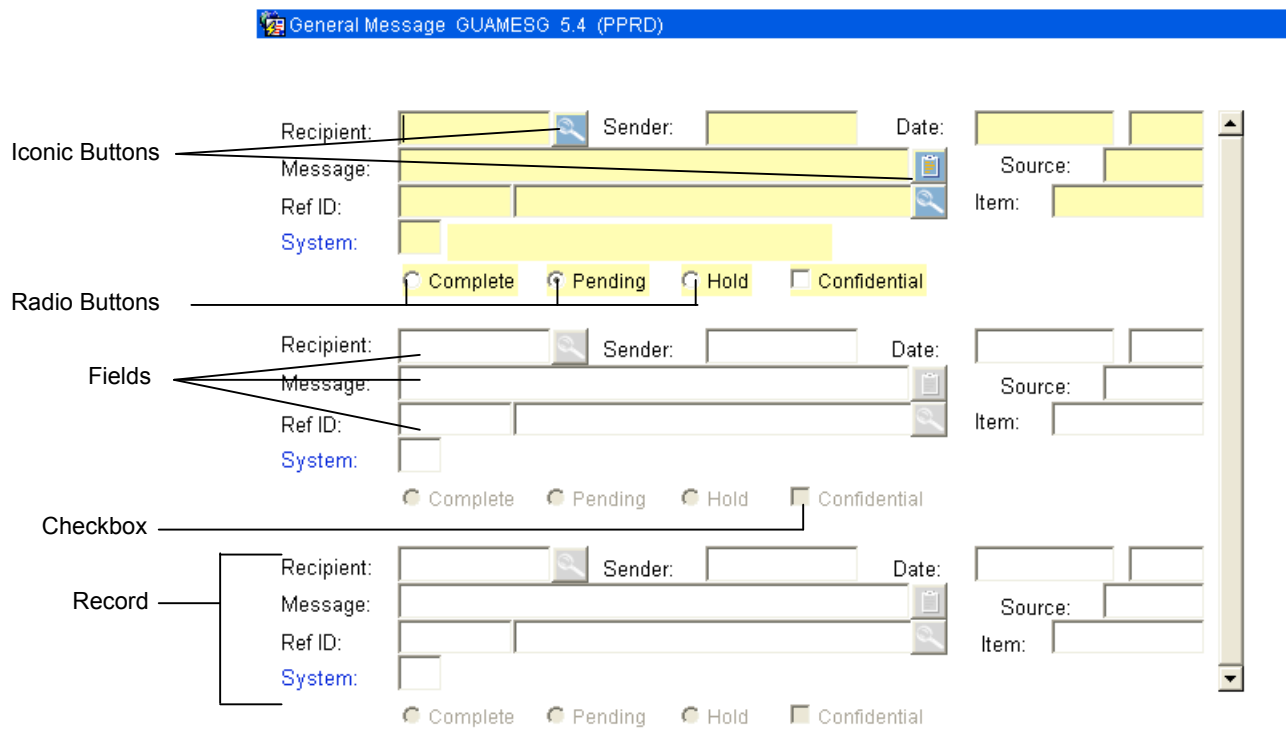
## Auto Hint Line

The auto hint line is at the bottom of the form and can contain the following information for the field where the cursor is located: brief field description, error and processing messages, keyboard equivalents. In most cases, Banner does not prominently display error messages; the error message is displayed on the auto hint line.

## Status Line

The status line is directly underneath the auto hint line. It can contain: the current record number followed by the total number of records, indication that the field has a list of values, indication that the form is in query mode.

## Elements of a Form



### Iconic Buttons

These are buttons that contain an icon/picture. They represent one or more actions that can be performed for the associated field or record.

### Radio Buttons

Radio buttons are small circles used to select one of several options in a group. You can pick only one radio button in a group.

**Checkbox**

Checkboxes are small boxes used to enable or disable features or options. When an option is enabled, a check mark appears in the checkbox. When the option is disabled, the checkbox is empty.

**Fields**

Fields are areas on a form where you can enter, query, change, and display information. A field can be enabled, disabled (grey text), enterable, or display only. Some fields have blue title names. This indicates that the field is validated against a specific list of values. Only values from this list may be entered into these fields.

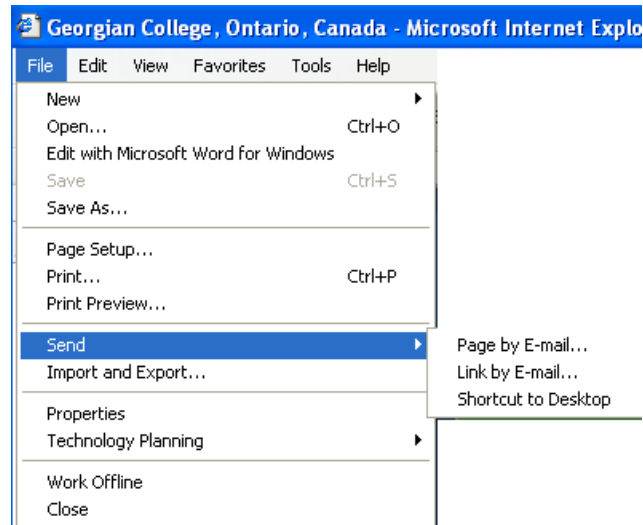
**Record**

Records are a set of related fields or logical unit of information. For example, a street, city, province, and postal code form an address record.

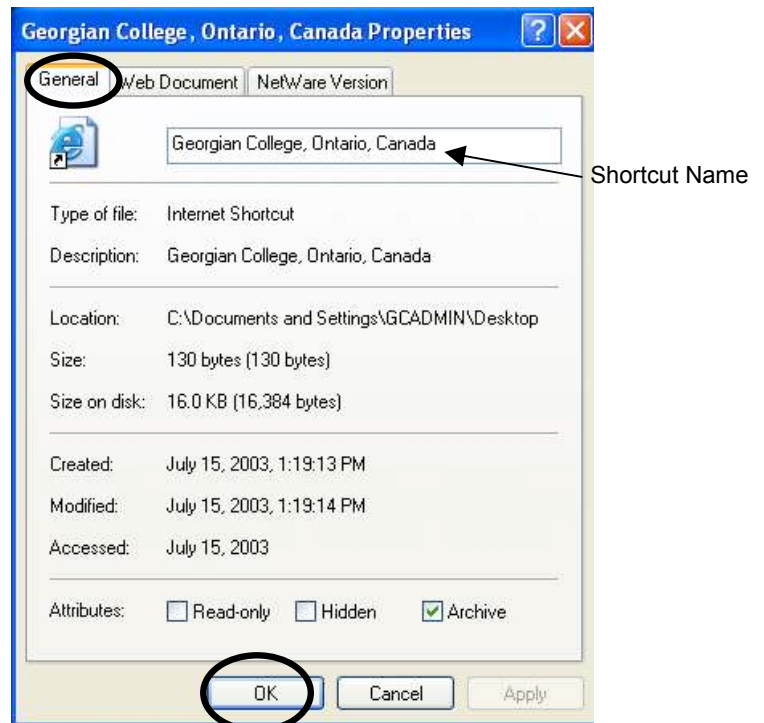
## HELPFUL HINTS

### Creating a Shortcut to SIS on Your Desktop

1. Go to <http://banner.georgianc.on.ca> .
2. Select the File menu, Send, and then Shortcut to Desktop.
3. Minimize or close your copy of Internet Explorer. The shortcut is now on your desktop.
4. You can change the icon or name of the shortcut through the Properties of the shortcut.



5. Right-click on the shortcut.
6. Select the General tab to change the name.
7. Select the Web Document tab to change the icon.
8. Click on OK when you have made the changes.



## **OTHER DOCUMENTS**

### **List of Reference Documents**

Accessing Georgian's Banner Information System  
Banner Information System Use and User Agreement  
Function Key Strokes and Icons Template  
Naming Conventions of Banner Forms and Tables  
Terminology

### **Other Reference Documents**

Data Standards  
Searching