

Banner Overview

Quick Reference Card and Overview

Introduction to Banner

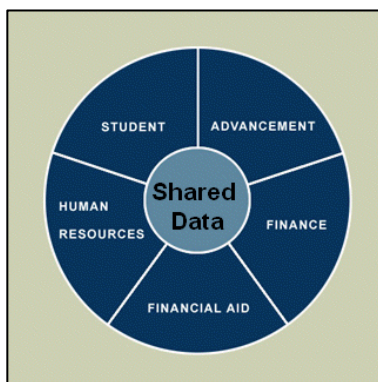
What is Banner? Banner is an all-encompassing administrative software application that is used to support the day-to-day activities of the college. Through its suite of products, functions such as payroll processing, student course registration, financial aid need analysis, and alumni tracking and can all be performed through one centralized system. At its foundation the Banner system utilizes a set of common elements, known as **Shared Data** that is used across all modules to provide a common set of information, and eliminating the need to reenter the information in each separate module.

Accessing Banner: The Banner System provides two methods for accessing, entering, and querying information.

The **Internet-native (Banner INB)** is mainly utilized by administrative and support staff of the college.

Banner Self-Service (Garnet Gateway) provides access to information generally used by employees, students, alumni, parents, and volunteers who are affiliated with the college.

Internet-native Banner and **Banner Self-Service** require the use of a web browser to access Banner information.



Login/Logout Banner

Login (Windows Computers):

1. Open Microsoft Internet Explorer
2. Navigate to the following website:
<http://banner.bates.edu>
3. At the login window, enter your **Banner Username** and **Password***. Leave the **Database** field blank.
4. Click the **Connect** button.

*Your **Banner Password** will be different from your **Network Password**.

Once you have successfully logged in, you will see the **Banner Main Menu**.

Logout:

1. Return to the **Banner Main Menu**
2. Click on the "X" located at the end of the **Banner Toolbar** or from the **Direct Access Menu (Labeled Go To...)**, type **Exit**.
3. Click on **Yes** to close your Banner Session.

Banner Components

Banner Components, Modules or Systems are each of the systems that can be used independently or in combination with each other to create a centralized system.

Shared Data: Shared data is the core system that provides common information across all of the Banner components. Since the data is shared with all of the components, once information about a person is entered in to Banner's core system, it can then be utilized by all of the components. An example of shared data is student information. When personal information about a prospective student is initially added to Banner, it does not have to be added again to each of the individual components, such as financial aid, student billing or accounts receivable (tuition). The student information is now shared across all of the Banner systems. Once a student graduates, the information collected throughout the student's time at Bates is also shared with the Advancement component.

The following are examples of shared data: ID Number, Name, Address, Phone Numbers, Gender, Date of Birth, Religion, Citizenship, and Ethnicity.

The following is a list of common components that are utilized at Bates College.

- **General System:** The General System is an integral part of Banner and is the core system that provides an integrated foundation for rules, functions, process and reports in Banner.
- **Student:** Provides an integrated foundation for the managing of student data.
Examples: Recruiting and Admissions, Registration/Academic History, Housing, and Class Schedules.
- **Finance:** Helps institutions manage both day-to-day and long-term budgetary issues.
Examples: General Ledger, Purchasing, Cost Accounting, Accounts Payable, Accounts Receivable, and Budget Development and Management.
- **Financial Aid:** Helps institutions administer financial aid from a student's recruiting process through graduation.
Examples: Needs Analysis and Awarding of Financial Aid.
- **Human Resources:** Helps institutions with the managing of faculty, staff, and student payrolls.
Examples: Personnel Management (Benefits Administration, Compensation, Health and Safety), and Payroll.
- **Advancement/Alumni:** Manages alumni, donors, parents, and friends of an institution.
Examples: Management of Constituents, Gifts/Pledges, Prospect Management, Events, and Solicitor Organization.

Banner Self-Service

Banner Self-Service components provide access to Banner components through the web. Bates College has branded Banner Self-Service as the **Garnet Gateway**.

Student Self-Service: Admissions, Financial Aid, Registration, and Tuition Payment.

Faculty and Advisor Self-Service: Update Schedules, Advise and Grade Students, and Manage Instructional Activities.

Advancement/Alumni Self-Service: Classmate Search, Online Donations, Identify Interests, Responds to Surveys, and Update Biographical Information.

Advancement Professional Self-Service: View Prospect Information, Record Contacts, and Moves Management.

Employee Self-Service: Check Payroll Information, Enroll in Benefits, Submit Timesheets, and Update Personal Information.

Obtaining Assistance

Assistance with Banner can be obtained through the following support channels:

- **Banner Online Bookshelf/Help Center**
- **Department Banner Liaison**
- **Help Desk Services**
 - Telephone Extension: 8222
 - E-Mail: helpdesk@bates.edu
- **Systems Development and Integration (SDI)**
 - Telephone Extension: 6266

Banner Forms

Banner Forms are online documents/templates that are used to add information to Banner or can be used to look up information from within the Banner System. A Banner form is similar to a paper form, except information is entered once into the Banner System and then can be used by other forms and reports.

The following is a list of the forms that are utilized within the Banner System:

Rule Form	Validation Form
Inquiry Form	Application Form
Query Form	Control Form
Maintenance Form	Wizard

Inquiry Forms and Query Forms: Are used to look up existing information.

Application Forms: Used to enter, update, and query information in the Banner System. The application form is the most common type of form used in Banner. Its main features provide the ability to enter information and to query information from the Banner System.

Maintenance Forms: These forms are used to reflect changes/updates that will affect information in the Banner System.

Understanding Form Names

Every Form within the Banner System has a **seven character** name. Most of the time, forms are referred to by their form name such as "SPAIDEN." The following naming convention position descriptions will help with understanding the names given to forms:

Position 1: Identifies the Banner product owning the form, report, process or table.

Example: A = Advancement, F = Finance, G = General, R = Financial Aid, S = Student (Shared Data).

Position 2: Identifies the application module owning the form, report, process or table.

Example: P = Person (Student), P = Constituent/Person (Advancement), P = Packaging and Disbursements (Financial Aid), P = General Person (Human Resources), P = Purchasing/Procurement (Finance).

Position 3: Identifies the type of form, report, process or table.

Example: A = Application, I = Inquiry, V = Validation, M = Maintenance.

Positions 4, 5, 6, 7: Identifies a unique four character code for the form, report, process or table.

Example: IDEN = Identification, STDN = Student Relation, PERS = Person.

SPAIDEN (S = Student, P = Person, A = Application, IDEN = Identification)

Form Components (Blocks & Fields)

Blocks: A block is a section of a form that contains related information. If a form contains more than one information block, each block may be enclosed within the main block. Information blocks may also be displayed as tabs.

Types of Blocks:

Key Block (Top): The Key Block is where you start on a form in which a unique code, such as a Bates ID Number is used to search and return information.

Information Block (Bottom): The Information Block is the section of information that relates to what was entered into the Key Block.

Fields: Each block within a Banner Form contains fields. Fields are the labeled space within the block. Fields can be used to enter, query, change or display information.