Introduction to Banner

Banner 8 User Guide

January 2011

REGISTRY SYSTEMS

Introduction to Banner

Contents

Refer to this tutorial to learn the basic concepts of Banner.

Purposes of this tutorial:

- **Introduce you to the Banner system**
- **Explain how to log in to Banner**
- **Provides an overview of the Banner Menu**
- **Explain key Banner concepts**

1. COMPUTER MISUSE AND DATA PROTECTION

The Banner system contains personal data about students. Therefore it is essential you are familiar with the Computer Misuse Act (1990) and the Data Protection Act (1998) as by signing a Banner Access Form you are agreeing to abide by these regulations.

Computer Misuse Act
The Computer Misuse Act (1990) makes it illegal to obtain unauthorised access to any computer or to modify its contents, whether it be a large multi user system or a desktop PC.

The Act specifically creates three new criminal offences:
(a) unauthorised access to computer material;
(b) unauthorised access with intent to commit or facilitate commission of further offences
(c) unauthorised modification of computer material.

The first refers to the use of any computer without permission **including logging on to another person's account**, even if that person is authorised to use the particular computer. The maximum punishment is six months in prison and an unlimited fine.

The second is concerned with the use that may be made of **any information obtained as a result of unauthorised access**, for example for the purposes of blackmail. Anyone convicted of this offence may face five years imprisonment and an unlimited fine.

The third, for which the maximum punishment is the same, relates to **any act which might cause the contents of a computer to be changed** and includes the **deletion or alteration of the contents of files** and the introduction of viruses.

The Data Protection Act 1998

The Data Protection Act is intended to protect the rights of the individuals about whom personal data is processed and recorded. The Act covers information that relates to living individuals; information held about companies or organisations is not subject to the Act. It applies to personal data held in a structured filing system, whether on paper, electronically, microfiche or other medium.

The Act places obligations on those who record and use personal data. They must be open about that use and follow sound and proper practices. The Data Protection principles are set out below. The Act is also intended to improve practice among computer users and to raise public confidence in computing.

The Data Protection Principles state that personal data shall:
- be obtained and processed fairly and lawfully
- be held only for specified and lawful purposes
- be adequate, relevant and not excessive in relation to the purpose for which it is held
- be accurate and kept up to date
- not be kept longer than is necessary for the registered purpose
- be kept safe from unauthorised access, accidental loss or destruction

We trust that all users of Banner will not misuse their access. If you suspect a member of staff to have contravened these directives, please contact us via BannerSupport@rhul.ac.uk.

2. WHAT IS BANNER?

Banner is a Student Records System – essentially a database of students' personal and study details. It also contains data about **Recruits** (potential students who have expressed an interest in applying to RHUL, e.g. by requesting a prospectus), **Applicants** (people who have applied to study at RHUL) and **Staff** (can be Academic or Administrative). It is supplied by a company called **SunGard HE** and we have had Banner operational at RHUL since the 200506 Academic Year.

Banner covers a number of functional areas. You will only need to become familiar with the areas your department is involved in, depending on your particular role. Just for reference though, these are some of the areas Banner covers:

- Recruitment Events and Prospectus Requests
- Admissions
- Programme and Course Creation (Curriculum Management)
- Student Personal Details
- Student Study Details
- Tuition Fee Billing
- Assessment & Academic History

3. LOGGING IN TO BANNER

Following setup of your Banner user account, a desktop shortcut icon to Banner will be installed by Desktop Support:

Banner

3.1.   Double-click the Banner shortcut. A Banner website will open, with a link to Banner 8. Click the link to launch Banner.

3.2.   Banner requires **two** windows to be open. One of them will be your Internet browser window (Figure 1), the other will be the Java window that Banner runs in. The login screen will load in this window after a moment (Figure 2).
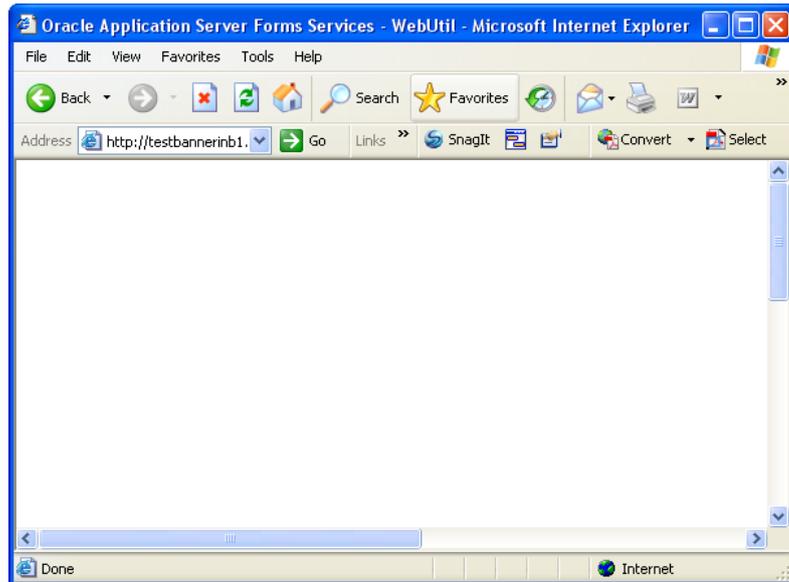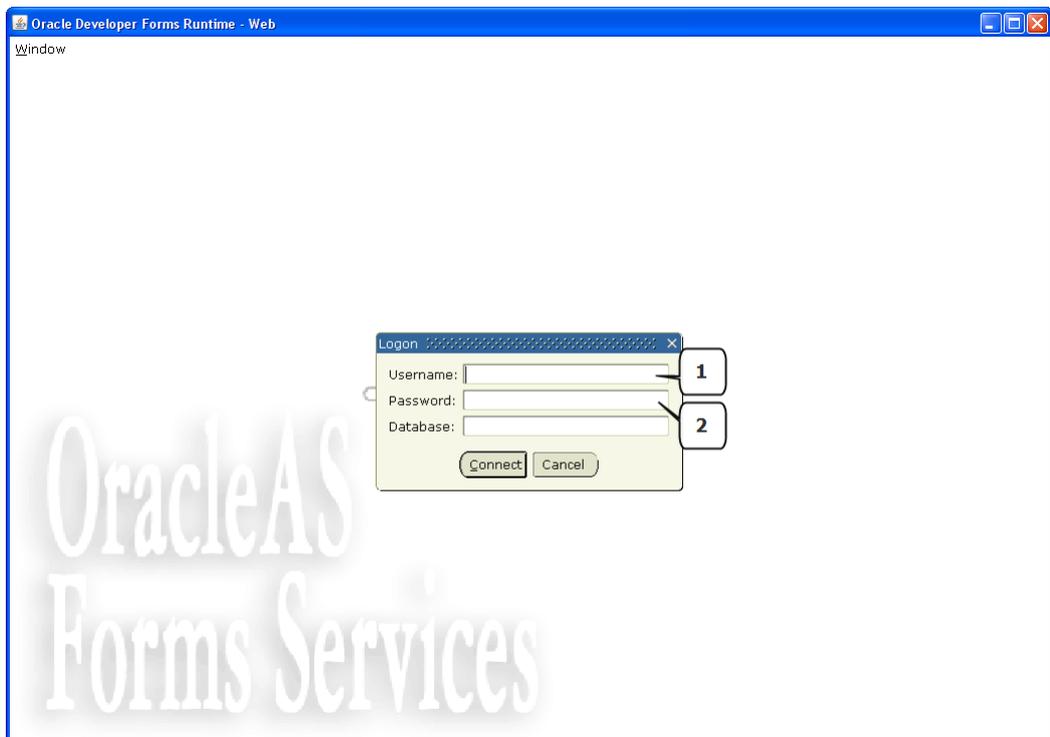
Figure 1

Figure 2

3.3.   Click into the *Username* field (Figure 2, Box 1) and enter your usual Computer Centre username. This field is not case-sensitive.

3.4.   Click into the *Password* field (Figure 2, Box 2) and enter your password. Click the 'Connect' button to log in.

4. OVERVIEW OF THE BANNER MAIN MENU

4.1.   After logging in, the screen will open to the Banner Main Menu (Figure 3). There are several elements to this menu:
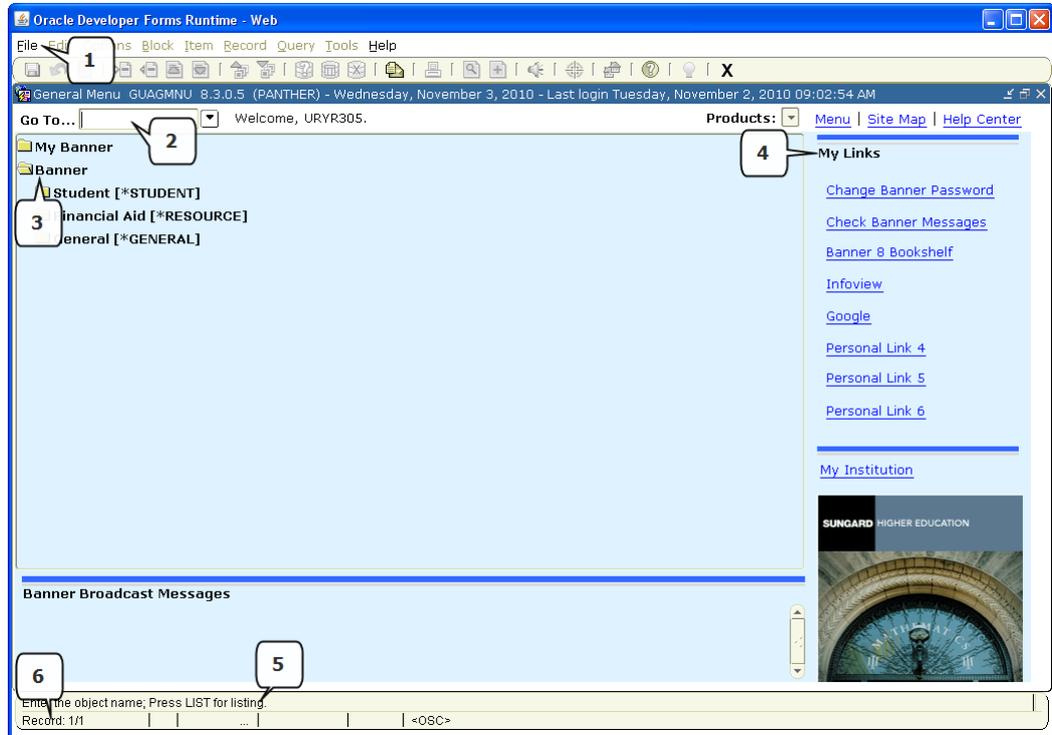

Figure 3

4.2.   The **File Menu** (Figure 3, Box 1). This is a standard File menu, that you would expect to see in any Windows-based program. You have the usual menus (File, Edit, Options) then some Banner-specific ones (e.g. Block).

4.3.   The **Go To Bar** (Figure 3, Box 2). This is the primary means of navigating around Banner. Use of the Go To Bar will be covered in the 'Navigating Banner' tutorial.

4.4.   The **Menu Tree** (Figure 3, Box 3). Banner can also be navigated using the Menu Tree structure. This is explored in more detail in the next section.

4.5.   The **My Links** menu (Figure 3, Box 4). This menu allows you to navigate to external websites directly from Banner. Some links will be preset, and some will be available for you to customise (see the 'Navigating Banner' tutorial).

4.6.   The **Hint Bar** (Figure 3, Box 5). Messages are displayed here depending on what you are currently doing in Banner – often the purpose of the field, or what can be done if you get stuck, plus any error messages or advice will show here.

4.7.   The **Status Bar** (Figure 3, Box 6). Where multiple records are displayed on the screen, the Status Bar will tell you which one you have currently selected, out of the total number of records available.

5. BANNER MENU TREE

5.1.   The Menu Tree is a means of navigating in Banner. The folders behave in the same way as regular Windows folder – double-click a folder to open/close it.
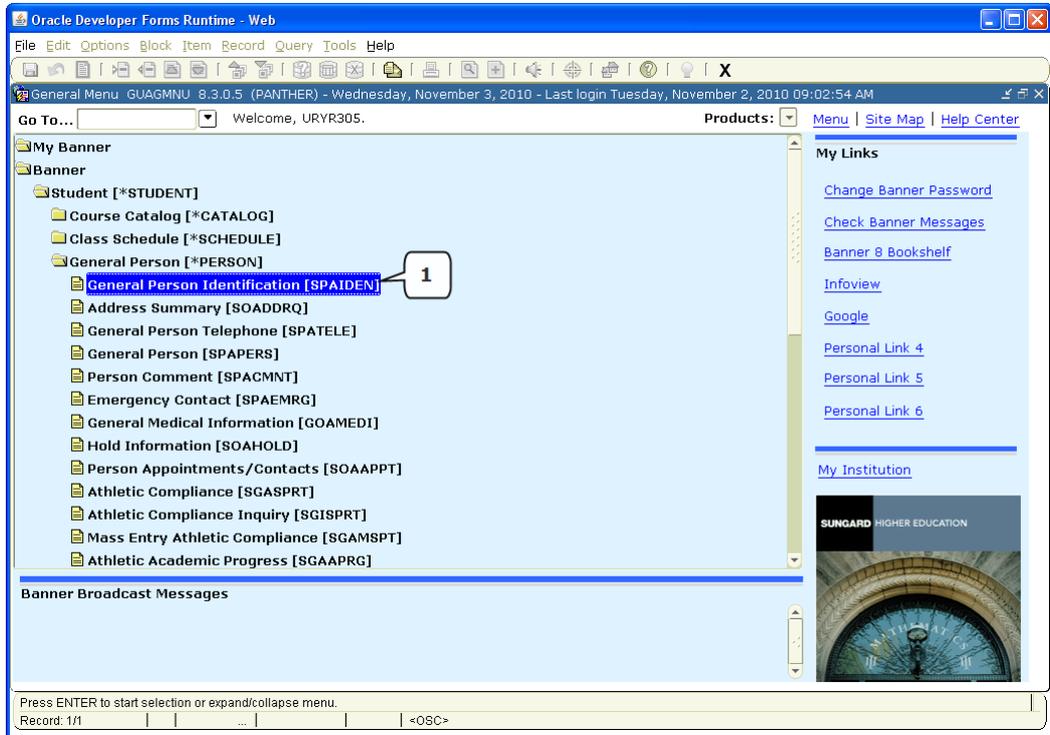

Figure 4

If...	And...	Then...
You expand a closed folder	It shows closed folders	They can be expanded
You expand a closed folder	It becomes an open folder	It cannot be expanded
You open a folder	The forms are listed	Double-click the form

5.2.   When you first log into Banner, you may find that the 7-character name in [Square Brackets] (Figure 4, Box 1) is not visible. This is the **Form Name** (more on Forms in the next section). To display this, go to the *File* menu and click 'Preferences'. In the top left corner of the screen that opens (Figure 5), there is a tick-box for 'Display Form Name on Menu'. Tick this, and the next time you log into Banner you will see the Form Names displayed.

Figure 5

6. WHAT IS A FORM?

Banner uses a form structure to visually organise the information in the database into a user-friendly format, so that data is easy to view and enter. Essentially, they are online documents comparable to paper forms you might have in a filing cabinet, but the data in them can be used by other forms and also reported on.

Banner forms have a name, and a description. Form names are always 7 letters. The first letter describes which 'area' of Banner the form relates to, while the last 4 letters are an abbreviated description of the form.

SPAIDEN
- 'S' for '**S**tudent System'
- 'IDEN' because it's the General Person **Iden**tification form

Forms will generally arrange data in functional areas, so each form in Banner relates to a specific aspect or purpose. The layout of a form is dependent on it's purpose, so every form looks different, although they operate in the same way and are comprised of the same elements.

Banner forms use a 'block' structure – related data is packaged together in blocks to promote ease of use and navigation. Blocks will vary in size, shape and layout on the form dependent on the form you are looking at.

6.1.   Using the form **SPAIDEN** as an example (Figure 6), the parts of a form are as follows:

Figure 6

6.2.   The **Title Bar** (Figure 6, Box 1) shows the full description of the form (in this case, General Person Identification).

6.3.   The **Toolbar** (Figure 6, Box 2) shows a series of icons for navigating in forms. This will be covered in detail in the 'Navigating Banner' tutorial.

6.4.   The **Key Block** (Figure 6, Box 3) is where you start on a form, as it is where you enter information that determines what is entered or displayed on the rest of the form. In the above example, the Key Block requires an *ID* and *Name* before you can proceed.

6.5.   The **Tabs** (Figure 6, Box 4) are only available on certain forms. They allow more rapid navigation through the form, by allowing you to skip straight to certain blocks.

6.6.   The **Information Block** (Figure 6, Box 5) is the where the data is displayed that relates back to whatever was entered in the Key Block. It is also where data is edited.

6.7.   The **Fields** (Figure 6, Box 6) are the individual boxes where you can enter, query, display and change individual items of data.

6.8.   **Records** are sets of related fields. For example, in **SPAIDEN** the *Last Name, First Name, Middle Name, Prefix, Suffix, Preferred First Name* and *Full Legal Name* fields all make up one 'Name' record. There can be multiple records within a block, or, as in this example, a single record within the block.

This concludes the Introduction to Banner tutorial. To learn how to navigate the Banner system, please refer to the 'Navigating Banner' tutorial.